OUR ISLAND OUR FUTURE

2022-2032 STRATEGY

ANNUAL VISITOR ECONOMY REPORT 2025

PROGRAMME 2026 – 2029

VISIT ISLE OF MAN

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AN UPDATE FROM THE CEO

Having joined the Visit Agency ('Visit Isle of Man') as CEO in March 2023, I have now completed three years in post. It felt the right moment to pause, reflect and review not only what has been delivered during that time, but also the ten-year 'Our Island, Our Future' visitor economy strategy and to see what remains relevant, how we have performed against the targets, and what still lies ahead.

The strategy was unanimously supported by Tynwald in May 2022, when I was serving as a volunteer on the Visit Agency Board as one of the first two UK-based Board members across the Agencies. The strategy was ambitious and well defined. Some elements, as is often the case, have progressed well; others have proved more challenging.

I have reflected on the annual update report I wrote nine months into the role, at the end of 2023. In it, I described myself as a 'tourist' and wrote about the Island's culture, history and heritage; its magnificent outdoors; the myths, quirks and superstitions woven into the fabric of the Island and its people; its sporting events; its emerging food and drink scene; and the significant potential for blue tourism, all under the overarching banner of the world's first whole-nation UNESCO Biosphere. That opportunity remains every bit as strong as it was then, but I am pleased to say that we have made significant progress since the difficult post-Covid tourism environment of 2023.

It also remains for me to say a huge thank you to the A Team that is Visit Isle of Man — a team that has adapted, evolved and grown, both individually and collectively.

We have been on a remarkable journey, and I am immensely proud of what they have achieved. The Visit team was strengthened further by the addition of the wonderful Welcome Centre team in April 2024 and, later that year, we subsequently — 'moved in' with them at the Welcome Centre in the Sea Terminal.

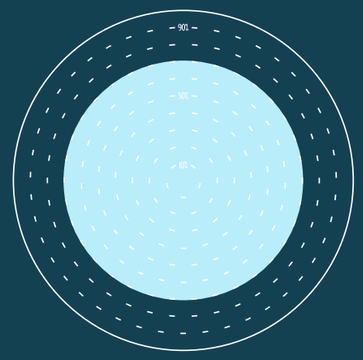
There has also been some movement in the Visit Agency Board membership, and I would like to thank everyone who has contributed. Their support has been unwavering and have mostly given their time on a purely voluntary basis. To my colleagues across the other Agencies, the Department for Enterprise and our sister Departments across the Isle of Man Government, I offer my sincere thanks. I know I am not always easy, but the old adage applies in my view 'nothing worth having comes easy', I am, it's fair to say, committed to driving positive change and continuous improvement. To the wider ecosystem of stakeholders across the visitor economy: we are on an exciting journey, with much still to achieve. Thank you for your support, advice and engagement. Let's up the ante!

Deborah Heather
CEO OF VISIT ISLE OF MAN

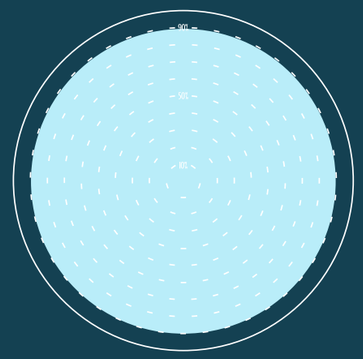
2032 TARGETS VS 2025 YEAR END

Our Targets (agreed back in May 2022) taken directly from the 'Our Island, Our Future Isle of Man Visitor Economy Strategy 2022-2032'.

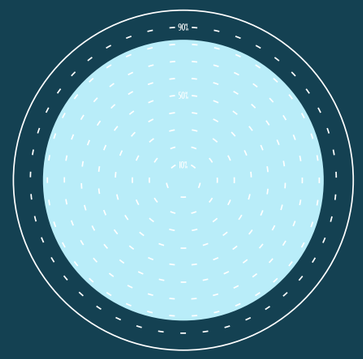
The original strategic targets were based on significant market research, comparisons with British island destinations and annual growth projections.



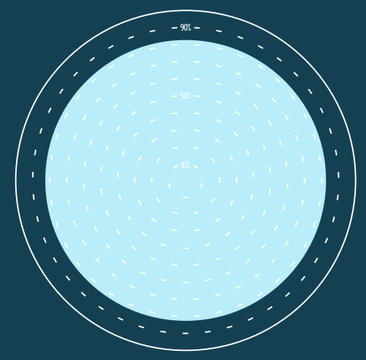
Visitors Per Year
TARGET - 500,000
ACHIEVED - 352,000
70%



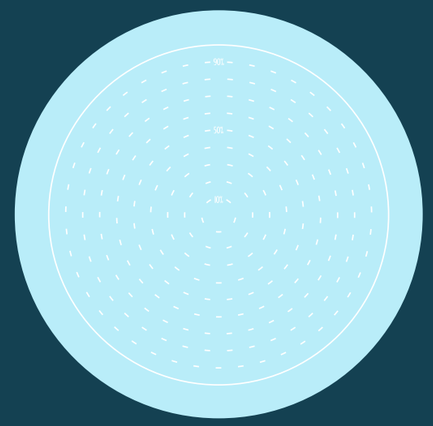
Visitor Economy Jobs
TARGET - 5,000
ACHIEVED - 4,477
89%



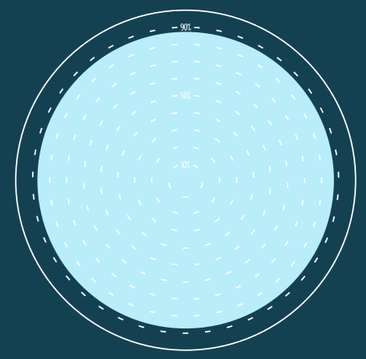
Annual Visitor Spending
TARGET - £310 million
ACHIEVED - £260 million
83%



Annual Economic Contribution
TARGET - £520 million
ACHIEVED - £433 million
83%



Avg. Spend Per Visitor
TARGET - £620
ACHIEVED - £789
127%



Annual Exchequer Benefit
TARGET - £49 million
ACHIEVED - £43 million
87%

All revenue, contribution and average spend totals have been adjusted for inflation. This felt the most transparent way to assess actual performance.

Up to the end of 2024, we relied on an Isle of Man Passenger Survey to measure visitor numbers to the Island — a globally recognised methodology based on exit interviews with around 10,000 passengers. However, like any survey-based approach, it was subject to nuance and anomaly simply because both interviewees and interviewers are human.

In 2025, we have continued to use the Passenger Survey as a sentiment measure. For this year, and for the future, visitor numbers have been established by analysing what is known as 'true origin of departure' data. This has been achieved by purchasing respected airline industry data and combining it with equivalent data received from the Isle of Man Steam Packet Company. It is not a perfect solution, and figures may move marginally either way, but it is based on significantly more of actual data than the previous methodology.

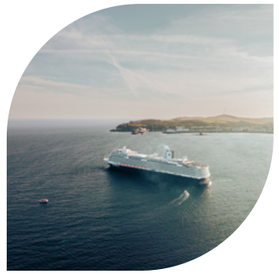
The average spend per visitor represents the most significant shift through to 2025: £430 in 2018 (unfortunately, 2019 figures were never published), rising to £551 in 2023 and £789 in 2025, all adjusted for inflation.

I believe this has been driven by a combination of factors: more ambitious pricing strategies among stakeholders on the Island, the impact of what we termed our 'noise' campaign, a sustained marketing and PR programme focused on driving demand, and a substantial increase in off-Island business development activity.

OUR ISLAND OUR FUTURE | 2022-2032 STRATEGY

OUR ACTION PROGRAMMES & PRIORITIES

While our action programmes remain broadly the same, there are some important refinements we believe should shape the second half of the strategy. Let me explain what they are, and why they matter.



Air & Sea Access Improvement vs Air & Sea Demand

While well intentioned, and clearly an important opportunity for growth, the fortunes of our connectivity routes are shaped by global forces across both air and sea travel. As a result, I believe our focus should be broader, it should include supporting and selling what we already have: backing the Isle of Man Steam Packet Company and the airlines that bring visitors to the Island, while also supporting the delivery and success of new routes.

The Visit Agency can influence, of course, but these are ultimately commercial organisations making commercial decisions. Our role is to collaborate, enable and support – fundamentally, as part of the 'account management' process.

In 2025, we saw year-on-year growth of around 15% in both air and sea visitors. Looking ahead, there are major opportunities in the Irish market, alongside other significant discussions taking place behind the scenes. For visitors and residents alike, both modes of travel are vital to our Island community, and the Visit Agency will remain focused on filling seats and car decks in the years ahead.

PRIORITIES

- **Maximise code share & interline agreements; target new markets**
- **Partnership campaigns**
- **Maximise cruise experience & opportunities**

Quality Improvement

When I arrived on the Island, an initiative called 'Visitor First' was already in place. It quickly became clear to me that destination stewardship needed to be broader than the word 'visitor' suggests – embracing engagement, culture and authentic experiences.

So, after a helpful nudge from Tynwald members, the 'Destination First Board' was established. While you may not yet have heard much about its work, I can assure you that significant progress has been made. Have you seen the Sea Terminal recently? Are you aware of the special places pilot at Cregneash? With ambitions to rolling this out to more of the Island's special places, as voted for by residents. This is not about creating another agency or department; it is a movement, a cultural focus, driven largely by volunteers and like-minded people – perhaps best described as 'forces of nature' – who want the best for their Island. It is soft power at its best.

Visitors have always loved this Island and, in 2025, 99.2% were satisfied or very satisfied. That is the equivalent of a net promoter score of almost 10 out of 10. In fairness, that level has not shifted greatly since I arrived; it has consistently been excellent. But this year we passed the 99% mark, which tells me we are attracting the right audiences and as we can see, delivering strong growth in average spend as well.

PRIORITIES

- **Stewardship (Destination First)**
- **Volunteer programme**
- **Tourism awards**
- **Welcome Centre Strategy**

Visitor Product Development

Having now spent three years on the Island, I have come to believe that the initial 2022 Visitor Product Development programme somewhat missed the mark; it was more a list of actions than a fully formed strategy. Some of our most significant challenges sit within this area, although there is clearly an invisible thread connecting it to other parts of the strategy. In the summer of 2023, the Visit Board and team held a workshop to identify what were then described as the 'crux' issues: seasonality, marketing and digitalisation.

Seasonality will always be a challenge for the Island, and the Visit team must respond accordingly. We have already made progress: we work much more proactively with travel agencies to market the off-season; we have reshaped our events programme, where possible, to support seasonal balance; and we have generated as much coverage as possible outside the peak period — including hosting the Guild of British Travel Writers on the Island in February 2024.
This will remain a perennial issue, but it is one that requires connectivity, sustained budget, effort and focus. It really is as simple as that.

PRIORITIES

- Digital booking system
- Seasonal product development
- Regenerative tourism initiatives, Eco Destination & Biosphere Development

Visitor Accommodation Transformation

The Isle of Man's tourism accommodation registration scheme would be the envy of most destinations, if they knew about it — particularly those grappling with overtourism. It means we do not face the problems created elsewhere by an unregulated sharing economy, where inappropriate accommodation can distort more traditional supply. For us, as visitor numbers grow, demand and supply can be managed in a far more controlled way.

That said, we do need to be honest and acknowledge that quality issues remain in some areas. Modernising the grading schemes, and the registration scheme itself will help us address this, but it requires some legislative change and will therefore take time. There are also challenges around value for money within some parts of the current provision; if that is not addressed, we risk displacement to competing destinations.

The third aspect of Visitor Accommodation Transformation is the need to attract different types of accommodation, and to encourage provision in different parts of the Island. This is not a challenge that will be resolved within the next year or 18 months. Shifting the quality and mix of provision is neither simple nor quick, but it will be a key focus for growth in 2026 and beyond.

PRIORITIES

- Improve quality & encourage new quality product
- Modernise accommodation standards
- Accommodation strategy

Events Development

The Tourism Events Development Scheme (TEDS) funding programme has consistently delivered thousands of visitors and millions of pounds in revenue: 11,783 visitors and more than £6 million in spend in 2025, to be precise.

But events achieve far more than that. Take the World Downhill Skateboarding Championship: it also generated 26 million of potential reach (13m from PR coverage and 13m from social content), while also offering up an opportunity for residents to experience a different international event, as reported. Events enable local and off-Island clubs and special interest groups to deliver specialist activity — the Parish Walk, bowls, darts, chess and more. I would also argue that Isle of Man plc is strengthened through events, not least through the role they can play in tackling some of the seasonality challenges we face.

The Visit team will continue to focus on a multifaceted events programme: recognising the value of the events we already have, supporting the attraction and conversion of new opportunities, and working towards the 'Golden Anniversary' programme, celebrating 50 years of the Tynwald Millenium', in 2029.

PRIORITIES

- MICE (Meetings, Incentives, Conferences & Exhibitions) / Festivalisatiion
- Sector events & PR stunts
- Golden Anniversary Millenium of Tynwald 2029 project

Talent Development vs Skills Development

This is a difficult one. The principle is right in terms of talent, but it is equally about recruitment into the industry. We do not want to focus on jobs for their own sake — if we increase demand, jobs will follow naturally. What we do want is to improve the attractiveness of the industry, and quality is central to that ambition.

Hospitality and tourism offer accessible and rewarding careers. They provide life- and career-enhancing experiences, from problem-solving to communication skills, and they allow people to progress through aptitude, attitude and hard work. I am reminded of an interview I once did for Panorama — it didn't make the final cut — in which I made exactly that point. The producer agreed, telling me that her best runners had always come from our industry. We then spent 30 minutes discussing the many sectors people can move into after being 'hospitality trained'.

We have decided to rename this area Skills Development. It is not just about product knowledge of the Isle of Man; it spans everything from entry-level training to middle- and senior-management development. After all, few things are more impactful in hospitality than an excellent on-the-job training manager — and that is how we will build skills.

PRIORITIES

- Entry level customer service
- Drive middle management & executive development programmes (e.g.HIT)
- Collaborate with sector & UCM

Market Development

Marketing is one of the areas of which I am most proud. I believe it has been an outstanding success: attracting different audiences, raising the Island's profile and achieving a great deal with limited resource. Just look at Wanderlust, Condé Nast and BBC Travel. Look too at the campaigns our marketing team delivered with Manx National Heritage around Archibald Knox. The combined activity of the wider Visit team contributes significantly here, as do the events delivered through TEDS, which are fundamental not only to the promotion of Isle of Man plc but also to the wellbeing of Islanders. We were genuinely blown away by the local turnout for the World Downhill Skateboarding Championships in 2025 — and, incidentally, the event returned to the Island on 3rd to 5th July 2026, at a bigger scale and taking place on the TT Mountain Course.

Digitalisation is critical for the Island and may well represent the single biggest opportunity for our industry. As in many predominantly leisure destinations, we have a high proportion of SME and micro businesses, many of which struggle to keep pace with advances in technology and are therefore reliant on secondary marketplaces to distribute and sell their product. As a result, they often pay substantial commissions, typically around 20% of revenue.

The good news is that we are on an island small enough to develop our own solution, return more money to the Profit and Loss statements of our stakeholders and reinvest in further activity by Visit.

That is about as much as I can say for now, but as with Visitor Accommodation Transformation, it is complex and will take time. Rest assured: we're on it.

PRIORITIES

- **Stakeholder partnership programme - campaigns & PR**
- **Stakeholder partnership programme - events & exhibitions**
- **Stakeholder partnership programme - quality development funding**

CONCLUSION

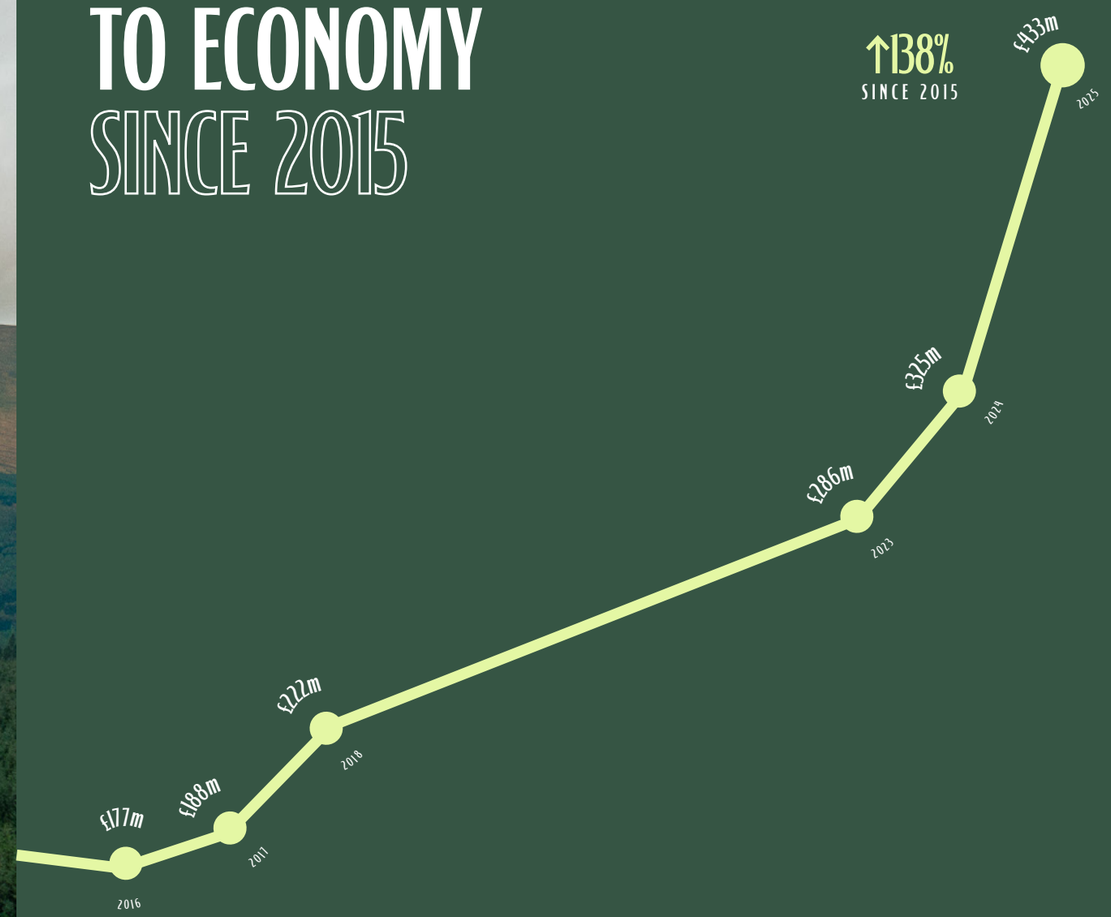
Four years on from the launch of **Our Island, Our Future**, I remain convinced that the strategy was the right one. The core ambitions still hold. What has changed is our understanding of where the greatest opportunities now lie, where the constraints are real, and where we must focus our effort if we are to deliver the strongest possible outcome for the Island. Meaningful progress has been delivered, we have learned a great deal, and we are entering the next phase with greater clarity, stronger evidence and renewed purpose.

The period since the launch of this strategy has been years of huge growth, both in the development of our team and our visitor numbers.

We've moved from very limited growth in the five years prior to Covid-19 to delivering an extra £200m into the economy since 2023, a £100m in 2025 alone. The industry has delivered £433m in total value to the economy in 2025, a 95% increase since 2018, having accounted for inflation.

Some of our ten-year targets have already been achieved, or are very nearly there, the others, we believe, are absolutely 'doable'. The question now is, how much more could be achieved with the benefit of further investment, focus and empowerment.

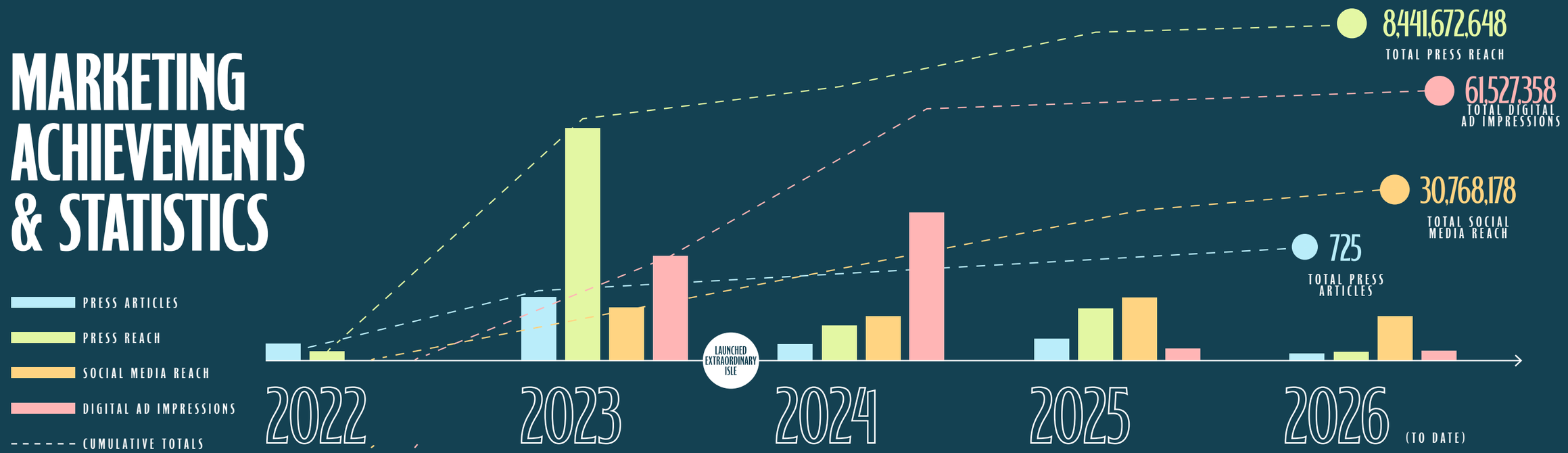
TOTAL VALUE TO ECONOMY SINCE 2015



Year	Visitors	R/Nights	After Inflation - A/S overnight visitors £	Revenue (Inc Cruise)	Exchequer Benefit (Total Revenue/6)	Total value to economy (Total Revenue * 1.67)	YOY difference Total value to economy (Total Revenue *1.67)
2015	292,268	1,479,805	£378	£108,892,029.42	£18,148,671.57	£181,849,689.13	£3,142,053.45
2016	313,975	1,443,883	£344	£106,299,180.73	£17,716,530.12	£177,519,631.83	-£4,330,057.30
2017	312,185	1,417,705	£368	£112,879,588.35	£18,813,264.72	£188,508,912.54	£10,989,280.72
2018	316,654	1,610,515	£430	£133,142,542.07	£22,190,423.68	£222,348,045.25	£33,839,132.71
2023*	326,087	1,689,435	£551	£171,603,968.64	£28,600,661.44	£286,578,627.63	£64,230,582.38
2024	332,613	1,622,667	£622	£195,150,605.65	£32,525,100.94	£325,901,511.43	£39,322,883.80
2025	352,301	1,731,885	£789	£259,513,917.50	£43,252,319.58	£433,388,242.22	£107,486,730.79

*Estimated Q1 and part of Q2 due to the reinstating of the passenger survey post covid.

MARKETING ACHIEVEMENTS & STATISTICS



2023

- Visitor numbers bounced back above pre-pandemic levels in 2023 – 318,000 visitors & £183.2m revenue in visitor spending
- Partnered with Dr Alex George, a distinguished doctor, mental health advocate and renowned podcast host, to record an exclusive three-part episode of his popular podcast 'Stompcast' on the Isle of Man, featuring special guest appearance by Peter Hickman. Generating PR reach of 1.9m.

2024

- Delivered approximately 330,000 visitors, generating **£212m in visitor expenditure**.
- Achieved a **98.7%** visitor satisfaction rate in the 2024 Annual Passenger Survey.
- Hosted over **50 members of the British Guild of Travel Writers**, the UK's leading association for travel media professionals.
- Delivered a **multi-award winning** TT and destination campaign; 'The Isle of Man, There's More To iTT'.
- Named as one of the **top ten** destinations in the 'UK Islands' category in the **Conde Nast Traveller's 2024 Readers' Choice Awards**.
- Named as one of the **top ten** most desirable Islands in Europe at the 2024 **Wanderlust Reader Travel Awards**.

2025

- Achieved a **99.2%** visitor satisfaction rate in the 2025 Annual Passenger Survey.
- Isle of Man named as one of the '**25 best places to travel in 2025**' by BBC Travel.
- Named the **3rd best island in the UK** in the **Conde Nast Traveller 2025 Readers' Choice Awards**.
- Became the **first destination in the British Isles** to host a stage of the **World Downhill Skateboarding Championship** in 2025, generating PR reach of 13m, and social video views of 13m – so over 26m of global coverage generated.
- Partnered with renowned TV broadcaster and marine biologist, Monty Halls, and became the **first destination** to pilot a new conservation project: the '**Big Blue Bag**'.
- Record cruise season, welcoming **26,357 cruise passengers** (highest number on record) and generating an estimated **£2.3m in cruise visitor spend**.

Year	Press Articles	Press Reach	Social Media Reach	Google Ad Impressions*
2022	41	214,383,078	-	-
2023	407	5,869,017,984	8,072,888	23,580,000
2024	102	838,634,817	6,655,723	33,658,185
2025	138	1,314,704,225	9,421,611	2,391,428
2026	37	204,932,544	6,617,956	1,897,745
TOTAL	**725**	**8,441,672,648**	**30,768,178**	**61,527,358**

* Google Ad impressions and spend varied over the 3 years dependant on wider campaigns, creating a timing issue when reviewing year on year.

OUR VISION FOR THE NEXT PHASE

For the next three years, the vision is clear: to build an Isle of Man visitor economy that is higher in value, stronger in quality, more resilient and increasingly year-round — one that reflects the distinctiveness of this extraordinary Island and delivers real benefit for our community, our stakeholders and our wider economy.

I have never believed that success is simply about chasing volume. It is about attracting the right visitors, growing value, extending the season and steadily improving the quality of what we offer. It is about building a visitor economy that is commercially stronger and more sustainable: one supported by robust air and sea demand, better accommodation, compelling experiences, a vibrant events portfolio and a more skilled and capable industry.

Above all, this is about backing the Isle of Man to be the very best version of itself. We should not try to imitate anyone else. Our strength lies in the uniqueness of our character, our culture, our landscape, our heritage and the pride people feel in this place. If we stay ambitious, work in partnership and remain focused on delivery, I believe we can create a visitor economy that is not only successful, but something the Island is genuinely proud of — one that enhances quality of place (and life) for residents as much as it enhances quality of experience for visitors.

There is still much to do, and I do not underestimate the scale of that task. But I am optimistic. The Island has the fundamentals, the authenticity, the distinctiveness to succeed. If we continue to be honest about the challenges, disciplined in our priorities and ambitious in our delivery, I am confident that the next chapter can be even stronger than the last.

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