

POLICY COMMISSION BLUE PAPER

<p>RESPONSIBLE BODY</p> <p>Policy Commission for Economy, Tourism, Regeneration and Transport</p>	
<p>PROJECT NAME</p> <p>Value for Money (VFM) Tourism</p>	<p>REFERENCE NUMBER</p> <p>E0505</p>
<p>1 PURPOSE OF ENQUIRY AND PROPOSED OUTCOME</p> <p>1.1 To provide a more efficient tourism service on the Isle of Wight in order to make the best use of Council resources and to ensure the effective delivery of the Tourism Development Plan. (Observations on the Tourism Development Plan can be found in Appendix A.)</p> <p>1.2 To enhance the quality of the tourism experience of the Island.</p> <p>1.3 This enquiry has been undertaken to fulfil a manifesto commitment.</p>	
<p>2 RECOMMENDATIONS</p> <p>Strategy</p> <p>2.1 Sharpen the Council's tourism strategy by bringing Isle of Wight Tourism (IWT, the Council's own tourism department), Festival and Event Management and the Isle of Wight Economic Partnership (IWEPP)'s brand promotion 'Inspire' project together into one strong corporate Tourism Strategy function. Strategy for optimising the economic impact of tourism should be a front line responsibility of the top Board level in Council governance. Significant savings arising from recommendations in this Blue Paper will more than provide for a Tourism Strategy budget, including any generic advertising that may be considered necessary.</p> <p>2.2 Confine Isle of Wight Council (IWC) participation in the Isle of Wight Tourist Board (IWTB) to strategic matters, allowing IWTB management to operate in the sector interests of the Island's tourist industry.</p> <p>2.3 Hold data derived from the Destination Management System (DMS) as a corporate asset, for informing tourism strategy.</p> <p>Operations</p> <p>2.4 Franchise rights to publication of the Council's official accommodation guide, associated literature and the www.islandbreaks.co.uk website; requiring full commercial value for goodwill and strict performance obligations from an exclusive franchisee.</p> <p>2.5 Enter into Tourist Information Partnerships at ferry ports with transport operators and provide services that are open when people travel. Integrate the remaining Tourist Information Centres with the Council's information services in libraries, museums and, ultimately, in customer-facing one-stop-shops.</p> <p>2.6 Transfer tourism call centre activity to the corporate call centre, using Destination Management System software as a tool.</p> <p>2.7 Close Westridge offices and transfer the corporate Tourism Strategy function to the corporate centre. After implementation of the above recommendations it is expected</p>	

that staff numbers in the corporate Tourism Strategy function would be fewer than ten people, including a strategic events team.

This body of work and the above recommendations were agreed and accepted by the Members of the Policy Commission for Economy, Tourism, Regeneration and Transport on Wednesday 10 May 2006.

**Cllr George Brown
Commissioner**

3 BACKGROUND TO PROJECT

THE NATIONAL CONTEXT:

- 3.1. Tourism is important to the national economy, with an impact varying from destination to destination. There are currently national initiatives in tourism relating to Destination Management Organisations (DMOs) and Destination Management Partnerships (DMPs). This has come from a central Government drive towards making Regional Devolvment Agencies (RDAs) more proactive in tourism. This involved switching funding from the English Tourism Council (now VisitBritain) into the RDAs in 2002 to encourage them to rationalise the tourism set ups in their respective regions. Some have chosen to create formal DMOs (NEast/NWest) whereas others have gone along the DMP route. The RDAs are accountable to the Department for Culture, Media and Sport (DCMS) ¹
- 3.2. During a visit to Weymouth & Portland Borough Council, the Commission learnt that despite this national drive for DMOs, some Authorities are not engaging in the DMO process e.g. Bournemouth and Poole are not joining with the Dorset DMO as they were more urban than the rest of Dorset. The Isle of Wight has a unique environment and it could be argued that the Island likewise would not benefit from joining in such a regional organisation with a regional branding.

THE LOCAL CONTEXT:

- 3.3. "Tourism is vital to the Island's economy. However, the industry is a highly fragmented and often complex one, mainly populated by very small businesses."² A Tourism Development Plan (TDP), approved by the Council in October 2005, addressed the structure of tourism bodies on the Island, placing strategic responsibility for tourism in the hands of the IWTB. The Commission takes issue with this part of the TDP (see Recommendations, above, and Appendix A, below).

1. Smith, N. 2006. *Information the Head of Tourism may wish to include in his presentation to the Commission*. Isle of Wight Council
2. Isle of Wight Council. 2005. *Isle of Wight Tourism – Guide to Services 2005/06*. Isle of Wight Council, p.2

4 CONSULTATION EVIDENCE

4.1 The Commission has consulted widely through formal and informal meetings, and written correspondence with:

- Isle of Wight Council officers
- Isle of Wight Councillors
- The Chamber of Commerce
- Mr David Shirley of the Visitor Attractions Association
- Mr Martin Potter of Island Life Magazine
- Mr Kevin Daniells of isleofwight.com
- Tourism South East
- Weymouth and Portland Borough Council
- Isle of Man

5 ISSUES IDENTIFIED

5.1 FINANCIAL:

The main areas of potential saving identified by the Commission are: -

- 5.1.1 Franchising print and website design, production and advertising sales on terms that will provide continuing revenue to the Council.
- 5.1.2 Cessation of direct service to commercial businesses in the tourist industry.
- 5.1.3 Integration of the Tourism Call Centre with the corporate information service.
- 5.1.4 Transfer of TIC activity (other than in Ryde, Cowes and Yarmouth) to other Council information premises.
- 5.1.5 Partnering the ferry port TICs with transport operators, using shared premises.
- 5.1.6 Closing Westridge offices.
- 5.1.7 Reducing the corporate tourism operation to fewer than ten people, including some transfers in from Cultural and Leisure Services.
- 5.1.8 Calculation of net savings will require detailed discussion with the Head of Tourism, other Service Heads and some outside bodies.
- 5.1.9 The 2006/07 budget for Tourism, and 2005/06 revised income figures are as follows:

<u>Tourism – General</u>	Budget
Expenditure, recharges and adjustments	<u>2006/07</u>
General employees	691353
Other employee costs	20041
Other premises costs	8000
Travelling expenses	8652
Other Transport Costs	4200
Materials equipment and supplies	271891
Services purchased	867528
Provided by contractors	20000
Recharges - SLAs	11575
Recharges from others	26457
Internal recharges	-10000
Contingencies and adjustments	-27807
Asset Rents	11536
Accounting Code adjustments	39367

Support service charges 66809

2009602

Income

Sales fees charges and rents -1174591

835011

Tourist Information Centres

Budget

Expenditure, recharges and adjustments 2006/07

General employees 330337

Other employee costs 5944

Fuel light & water 6070

Other premises costs 42210

Travelling expenses 2975

Materials equipment and supplies 3400

Services purchased 17685

Provided by contractors 4100

Recharges - SLAs 2100

Recharges from others 1000

Contingencies and adjustments -100278

Asset Rents 9717

Building maintenance 7064

Accounting Code adjustments 2330

Support service charges 25537

360191

Income

Sales fees charges and rents -120000

240191

	TOURISM- INCOME ANALYSIS			
	2005-06-Revised Budgets			
	<u>As at 31st March 2006</u>			
	<u>Description</u>			<u>Amount</u>
				£
	<u>Tourism</u>			
	IW Guide	Accommodation Advertising		506,350
	Attractions Guide	Advertising		30,550

	Camping & Caravan Leaflet	Leaflet income		5,000
	Call centre	Commission		14,000
		Ferry Booking Income		15,000
		Leaflet drop income		15,091
	Summer Pocket Guide	Guide income		197,650
	Winter Pocket Guide	Guide income		55,000
	Image Campaign	Contributions		171,000
		CCTI contribution		10,000
	Exhibitions	Exhibitions income		36,000
	Eating Out Guide	Guide income - current year		24,000
		Guide income - New Year		28,000
	Internet	internet income		25,000
	Revised budget 2005-06 per Budget Book			1,132,641
TICs				
	Sales-trading			94,000
	Commission			13,000
	Car Park Income Commission			7,000
	Accommodation Booking Fees			11,000
	Revised budget 2005-06 per Budget Book			125,000

5.2 STRATEGIC:

Recommendation 2.1 – Tourism Strategy

5.2.1 There is much history attached to tourism management on the Isle of Wight, and in particular the Council's relationship with the tourist industry. The Commission recognises an opportunity to reverse past trends by placing strategic responsibility firmly in the hands of the IWC. Only the Council has a mandate to shape the Island to the needs of residents and to make it attractive to those visitors who bring economic benefits to the Island.

5.2.2 Tourism requires a sharper, higher profile in the Council's corporate strategy, if this leading generator in the Island's economy is to grow and change to meet new market opportunities and competition. Professional input is in silos, with the Head of Tourism, Head of Cultural and Leisure Services and the Managing Director of IWEP all playing roles. The picture is further distorted by a quasi-executive IWTB, on which the IWC does not have voting control. It is indicative that the Managing Director of IWEP sits as a voting member of IWTB and enjoys considerable latitude in the unilateral pursuit of projects with tourism implications. The Council's

professional Head of Tourism makes no direct contribution to IWEP's strategic priorities.

- 5.2.3 The Council's corporate tourism strategy should decide such matters as the value of generic Island promotion in the Press and on television. Campaign budgets, sources of funding contributions, agency arrangements and advertisement approval are also matters for corporate decision at strategic level.
- 5.2.4 The top Board level in Council governance will have overarching responsibility for delivery of the Inspire project. This project is inextricably linked with the Island's tourism economy and will require top level tourist strategy and monitoring.
- 5.2.5 By concentrating its resources on strategic matters, the Council should reduce the headcount of those employed directly on tourism to fewer than ten people, including a strategic events team. Corporate Call Centre costs will increase if the Commission's recommendations are accepted, but there should be economies of scale. The cost of Tourist Information Centres is considered under Recommendation 2.5, below.
- 5.2.6 Appendix A, below, includes examples of strategic plans with tourism implications.

Recommendation 2.2 – Relations with the IWTB and the Tourist Industry

- 5.2.7 IWTB exerts more of a "bottom-up" than "top-down" influence on the Council's Tourism Department. This is not surprising, considering the commercial interests represented on IWTB. The Chamber of Commerce (CCTI), itself a membership organisation, played a leading role in construction of the Tourism Development Plan, which relies on consensus in the tourist industry with direct operational support by the Council. Whilst the broad objectives of the TDP are not challenged by the Commission, its task organisation for achieving those objectives is considered weak, especially in conferring strategic responsibility on the largely consensual IWTB. The Commission was interested to learn that the Isle of Man Government has decided to focus its professional tourism resources on policy and to "shed doing the doing".³ IW Tourism has displayed an opposite tendency in the arm's length strategy of its TDP and its operational involvement in day-to-day activities, such as publishing and information services.
- 5.2.8 The Commission does not denigrate the work of IWTB which is at least partially representative of the commercial providers of accommodation and attractions on the Island. In conjunction with the CCTI, one of its key members, it is well placed to coordinate such matters as quality improvement schemes and industry training. It is inappropriate for the Council to continue to provide operational support to the commercial part of the tourism economy when its responsibility is to the whole community, including residents, businesses and the environment. Only the IWC is truly independent and has a responsibility for ensuring that the needs of the whole destination, including residents, businesses and the environment are represented and considered in the management of tourism⁴. It is understood that in the past the Southern Tourist Board has offered financial support to the IWTB in role of representing the tourist industry.

Recommendation 2.3 – Destination Management System Data

- 5.2.9 Data derived from the Destination Management System represents a comprehensive and continually growing picture of tourism supply and demand on the Island. It is held in a system with powerful analytical capability. The Council's DMS investment has been substantial in cash and resources and it is sensible to extract the maximum value. Because of contractual obligations, it is necessary to hold the DMS system within the Council and the Commission recommends that it is used as a tool in the corporate call organisation. Substantial operating saving can be achieved if the Council's franchisee for print and website publishing is required to transcribe input for the system into electronic form.

3. Le Page, G. 2006. *Value for Money Tourism (E5/05) – Visit to Isle of Man Wednesday 5 April – Thursday 6 April 2006*. Isle of Wight Council, Isle of Wight

4. IW Chamber of Commerce, Tourism & Industry. 2006. *IW Tourism Value for Money Review - 31st January 2006*. IW Chamber of Commerce, Tourism & Industry, Isle of Wight.

5.3 OPERATIONAL:

Recommendation 2.4 – Franchising print and website operations

5.3.1 Operations presently undertaken by IWT which fall within the capability of the commercial sector should not be a demand upon Council management resources. There is healthy competition between commercial firms whose business is in print and website design, publishing and advertising. Franchising under strict conditions is entirely feasible, especially as the Council's in-house operations have an established record of advertising revenue and wide distribution.

5.3.2 The Commission is aware that the Island's accommodation and attractions providers have an ever increasing choice of publishers and media for marketing their establishments. Some have already reduced their advertising space in IWT's official accommodation guide, or have pulled out altogether. This is evidenced by the decrease in larger scale advertisements in the Official Guide ⁵. Free registrations on the Council's islandbreaks website are growing, with its unique selling point of exposure to those who access Englandnet. Nevertheless the way ahead for tourist industry advertising is far from clear and it is likely that the most effective commercial publishers will lead the way. This is not, in the Commission's view, an arena in which Council officers should compete against the private sector.

5.3.3 By franchising print and website publishing any risks associated with market movement are transferred away from the Council. Neither Weymouth & Portland nor the Isle of Man Tourism Departments operate print publishing and distribution ⁶, as their managements consider that they cannot compete with commercial skills and economies of scale. It is also the stated opinion of the CCTI that private sector print and website publishing should be more effective than an internal Council operation ⁷. Presentations from Martin Potter and Kevin Daniells illustrated that there is a business will to take this on ⁸.

5.3.4 A franchise agreement should be drafted to ensure that IWC-branded official literature and website meet tight quality and performance standards. It will also be necessary to specify the feedback of DMS software input required of the franchisee. It is assumed that the tendering process will conform to top procurement and pre-qualification standards, including full financial diligence.

5.3.5 Should the procurement process indicate that the strength of candidates is better harnessed by franchising separate candidates for print and website operations, this would be considered an acceptable alternative.

5. Potter, M. 2006. *Notes of Informal Meeting with Martin Potter held on 6 March*. Isle of Wight Council, Isle of Wight.

6. Overview and Scrutiny Team. 2006. *Value for Money Tourism (E505) – Visit to Weymouth Friday 31 March 2006*. Isle of Wight Council, Isle of Wight.

7. IW Chamber of Commerce, Tourism & Industry. 2006. *IW Tourism Value for Money Review - 31st January 2006*. IW Chamber of Commerce, Tourism & Industry, Isle of Wight.

8. Isle of Wight Council. 2006. *Policy Commission for Economy, Tourism, Regeneration and Transport notes of evidence 31st January 2006*. Isle of Wight Council, Isle of Wight

Recommendation 2.5 – Tourist Information Centres

- 5.3.6 Bureau-based information services for visitors should be provided with a clearer focus on need. Those arriving by ferry with requirements for accommodation or travel information, or a booking service, may assume that such information will be available on their arrival. There is a community of interest between the Council and travel companies in satisfying that requirement, for public relations and welcoming purposes. Southern Vectis, the particular ferry operator and the Council all have offices in Ryde, Cowes and Yarmouth, whose functions are customer-facing, information-providing and booking. The Commission's recommendation to enter into partnership negotiations with transport operators is not based upon market testing, but rather on the commonsense of sharing facilities at entry ports.
- 5.3.7 The information needs of visitors after they have arrived on the island coincide to a large measure with those of residents, and should be catered for initially through the libraries and museums service, integrating the current TICs in towns where there is no port of entry with the Council's Information Services. Ultimately, 'one stop shops' should combine the needs of visitors and residents in one place.
- 5.3.8 The Commission cannot predict the outcome of negotiations with transport operators to set up a combined information service at ferry ports, or the differential cost of welding tourism information to the Council's information services. Nevertheless, it is assumed with confidence that the overall cost of recommended arrangements will be less than the cost of maintaining present TICs. There will also be consumer benefits.
- 5.3.9 It is emphasised that the welcoming quality of all providers in the private sector, as well as Council staff in information functions, should be advanced by training, preferably through IWTB or CCTI. The Commission was impressed by a bespoke training scheme on the Isle of Man, which covers attractions, carriers, heritage, hotels, pubs, restaurants, retail, self catering and taxis. This scheme, more specific to an Island environment than 'Welcome Host', is available for adaptation to the Isle of Wight⁹.

Recommendation 2.5 – Call Centre Operation and DMS

- 5.3.10 The Commission's recommendations are all "silo-busting". There will be savings in establishment costs and overheads if the present Tourism Call Centre is integrated into the corporate organisation.
- 5.3.11 The DMS, operated within the tourism silo, is a software system developed at considerable cost, but in which IWC – a continuing major contributor - has no intellectual property rights. The system allows information on registered accommodation and attractions providers to be accessed universally through the Regional Devolvment Agency's Englandnet website. Its "availability" function can be used for automatic on-line booking. The system also holds information on individuals who request Accommodation Guides or provide information on themselves through the islandbreaks web pages.
- The Commission is not persuaded that the DMS offers significant economic benefits from its automatic accommodation booking capacity. It is, however, a useful system for holding industry information in standard form for multiple publishing and reference purposes. It also provides the most complete and dynamic data on would-be visitors for market research and targeted advertising.

9. Overview and Scrutiny Team. 2006. *Value for Money Tourism (E5/05) – Visit to Isle of Man Wednesday 5 April – Thursday 6 April 2006*. Isle of Wight Council, Isle of Wight

- 5.3.12 Because of the conditions of the DMS software development contract with Hampshire County Council it is necessary for its central control to remain within the Council. If the system is retained as a tool in the Corporate Call Centre, it is proposed that input of accommodation providers' and enquirers' information in electronic format should be a condition of the franchise contract recommended above.
- 5.3.13 Further development of the DMS at the Council's expense should be curtailed. If the tourist industry wishes to develop the availability functions of DMS or enhance its inter-website capacity, it would be appropriate for IWTB to underwrite such expenditure.

Recommendation 2.5 – Close Westridge Offices

- 5.3.14 If the above recommendations are accepted it will no longer be necessary to maintain Westridge as offices for IWT. Apart from significant establishment savings, proximity to the Corporate Centre is essential if tourism strategy is to assume a higher and more appropriate economic profile.

5.4 LEGAL:

- 5.4.1 Because of contractual obligations, it is necessary to hold the DMS system within the Council.
- 5.4.2 The provision of tourism services is not a statutory obligation.

6 GLOSSARY (From Isle of Wight Council. 2005. *Isle of Wight Tourism - guide to Services 2005/06*. Isle of Wight Council, Isle of Wight)

- 6.1 Tourism Strategy – what the Isle of Wight Council chooses to do to optimise the beneficial impact of tourism on the Island's economy.
- 6.2 Isle of Wight Tourism – the department of the Isle of Wight Council that is dedicated to the promotion and development of tourism. It has put together the new Tourism Development Plan.
- 6.3 Isle of Wight Tourist Board – a partnership that has been established on the Island by the Regional Tourist Board, Tourism South East (TSE) to oversee the implementation of strategic plans for the long term development of tourism. It consists of representatives from Tourism South East, Isle of Wight Council, Chamber of Commerce, Tourism and Industry, Ferry Operators, the Isle of Wight Economic Partnership, IW College/COVE, AONB and the Arts.
- 6.4 Chamber of Commerce, Tourism and Industry (CCTI) – the Chamber is the private sector lead membership body that seeks to represent the interests of all businesses on the island. It has a joint membership arrangements with TSE.
- 6.5 Other Tourism Associations - Visitor Attractions Association (VAA) and Places of Interest and Leisure Attractions Association (PILAA).
- 6.6 Destination Management System (DMS) – a system that holds information on over 850 tourism related businesses and is used to feed the Tourist Information Centres, Call Centre and website with information on places to stay, events, attractions, eating out, local shops, and transport.
- 6.7 Isle of Wight Economic Partnership (IWEP) - The Isle of Wight Economic Partnership

is an independent not for profit company guided by a Board of 8 non-executive directors drawn from both business and public sectors. The main aim of IWEP is to improve the quality of life for Island people by developing the economy, creating new jobs and enhancing the environment.

- 6.8 South East England Regional Assembly (SEERA) – is the representative voice of the region. It comprises 112 members, including elected councillors nominated by the region's local authorities. There are also regional representatives chosen by the voluntary sector, environmental groups, faith communities, business and economic partnerships, education and cultural networks and town and parish councils. The Assembly is part-funded by the region's local authorities and has the opportunity to draw down resources directly from central government.

7 Financial/Reputational Risk Assessment by Tracy Ringer, Business Development Manager, Finance (Economic Development and Regeneration)

Nature of Risk	In-house	Franchised	Possible controls
Locate Tourism strategy (plus events team from leisure services) with the Corporate centre – risk that this service will not embed satisfactorily having been detached for so long.	1 x 1 = 1	n/a	Careful man management and supervision. No adverse affect on budget, potentially a cost saving.
Close Westridge Offices once strategy function relocated – risk that the space will be wasted and costs such as rates etc will fall harder on other services located there.	1 x 3 = 3	n/a	Identify an alternative service to occupy the space. Close the building altogether (relocating the squash courts etc.) and offer for sale generating a potential capital receipt. No adverse affect on Tourism budget but may be for other services unless a cost saving/sale can be achieved.
Franchise rights to publication of the Council's official accommodation guide, associated literature and the islandbreaks.com website - risk that this will not generate as much as currently achieved by dealing with publication and distribution from in-house.	n/a	1 x 2 = 2	Possibly an adverse affect on the budget, but potentially a cost saving/income generation activity. If this were retained in-house there is the risk of a decline in the market for advertising revenue in future years.
Integrate TIC provision with transport operators (Tourist Information Partnerships at ferry ports) and/or the Council's information services in libraries, museums and, ultimately, in customer-facing one-stop-shops – risk that tourism speciality will be diluted.	1 x 2 = 2	1 x 2 = 2	Need to ensure that appropriate staff are kept informed as to tourism strategy and facilities. No adverse affect on the budget, potentially a cost saving.
Transfer call centre activity to the corporate call centre – risk that tourism speciality will be diluted.	1 x 2 = 2	n/a	Need to ensure that appropriate staff are kept informed as to tourism strategy and facilities. No adverse affect on the budget, potentially a cost

			saving.
Use DMS software within the corporate call centre as a tool – risk that user licence numbers will need to be increased for potential number of users.	1 x 2 = 2	n/a	Possible adverse affect on the budget, however there may be cost savings available from other aspects of DMS provision.
Risk that staff will leave who may be key players in the re-structure of the Tourism function.	1 x 2 = 2	n/a	Careful man management and supervision. Possible adverse affect on the budget if replacement staff cost more than current staff.

Risk score methodology:

Impact		Likelihood	
1 – Low, under £250,000	X	1 – Very unlikely	= Risk
2 – Medium, under £500,000		2 – Possible	
3 – High, under £1m		3 – Probable	
4 – Catastrophic, over £1m		4 – Very likely	

8 EVIDENCE / BACKGROUND PAPERS / ADDITIONAL INFORMATION

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Date: 2 May 2006

APPENDIX A - TOURISM DEVELOPMENT PLAN

DRAFT

The Tourism Development Plan, referred to in the Commission's terms of reference, was accepted by Full Council on 12 October 2005. It is a document co-authored by the Head of Tourism and CCTI. The Commission endorses the thrust of the plan but takes issue with its placement of the Isle of Wight Tourist Board in the lead position on strategy. Accountability for delivery of the objectives of the TDP rests with different managements, and requires resources, over which IWTB has no control. The TDP includes objectives covering branding (IWEF), quality of accommodation, restaurants and attractions (individual businesses), transport services (providers), Island Plan, civic realm, festivals and events, information and general infrastructure (IWC). In the Commission's view no organisation other than the IWC, or subsequently the top Board level in Council governance, has anything approaching the necessary authority to influence these objectives.

The TDP states that CCTI should be the formal representative of the whole tourism industry on the Island. The implication is that all businesses in the industry should be subscribing members of CCTI, or not be represented on the IWTB. The Commission recommends that this part of the TDP should be amended to state that the IWTB expects to represent the interests of all businesses in the tourism industry, whether or not they are subscribing members of CCTI.

The Commission recommends that the Tourism Development Plan is revised by the Council as the basis of its Corporate Tourism Strategy. Strategic plans are required for regeneration of the Bay (including planning strategy for change of use of outmoded holiday accommodation); a single Island sports training centre suitable for the 2011 Island Games and pre-Olympic squad acclimatisation (this project should include the closure and regeneration of time-expired existing leisure facilities for other purposes); fixed facilities and market-led accommodation for extreme sports, Cowes Week extension, Newport Harbour facilities, air service; Three Islands Sky channel and general infrastructure improvements for residents and the attraction of target groups of visitors. This list should be extended, or have items removed, as an integral part of Corporate Tourist Strategy.