

Isle of Wight
Tourism Development Plan

Working Smarter for a
Sustainable Future

The 2020 Vision for Tourism

Executive Summary
August 2005

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Working Smarter for a Sustainable Future **The 2020 Vision for Tourism**

INTRODUCTION

In 2004, Tourism South East designated the Isle of Wight as a discrete sub region in its Regional Tourism Strategy and produced a set of sub regional priorities for the island. It also established the Isle of Wight Tourist Board.

The Tourism Development Plan (TDP) has been produced by the Isle of Wight Council Tourism Service, in consultation with the Tourist Board, and identifies how these priorities might best be implemented. The TDP will also integrate with the wider Island Plan for the period up to 2020 and, more specifically, with the Local Development Framework and Regeneration Programmes.

The Tourist Board itself has now endorsed the TDP in its present format.

It sets out a 2020 Vision where tourism will be a "***high quality, thriving, competitive and sustainable tourism industry..... which generates wealth, promotes environmental quality, enriches the quality of life and brings enjoyment to visitors.***"

The impact of tourism on the Isle of Wight is extensive. The island's economic, environmental and social well being is fundamentally influenced by the way in which the tourism industry operates.

Tourism is worth over half a billion pounds to the islands economy.

It currently generates £360 million of direct tourist expenditure, £25million from visiting yachts and a further £150 million through the multiplier effect on suppliers and income induced spending. It also supports over 20% of jobs on the island.

Forecasts of growth in short breaks, overseas markets, visiting friends and relations and day trips indicate that, if the island responds to changing markets and visitor expectations, then it can expect net expenditure to increase by nearly 40% by 2020 to half a billion pounds directly and, potentially, another £200 million through the multiplier effect. This will come mostly from another 1 million staying visitors who will be primarily visiting in the off peak periods of the year.

The Actions contained in the TDP will aim to make tourism :-

- **A better employer** – with a better paid, skilled and satisfied workforce
- **Radically less seasonal** – longer, flatter patterns of business
- **A creator of more wealth** – higher spend from visitors and more profitable businesses
- **Of higher quality** – across the whole spectrum of visitor experience
- **Achieve higher levels of repeat business** – with more satisfied and motivated customers
- **More acceptable locally** – where tourism is seen as a credible part of the economy and positive contributor to the quality of life on the island
- **Enhance and protect the environment** – by ensuring that key assets are not spoiled by over development or excessive use.

However, ultimately, the challenge for TDP is to ***Build Confidence***.....

.....in the visitors that the island can meet their needs and expectations.

.....in the Public Sector, so that tourism is seen as a credible and effective contributor to the economic, social and environmental well being of the island and to align expenditure accordingly.

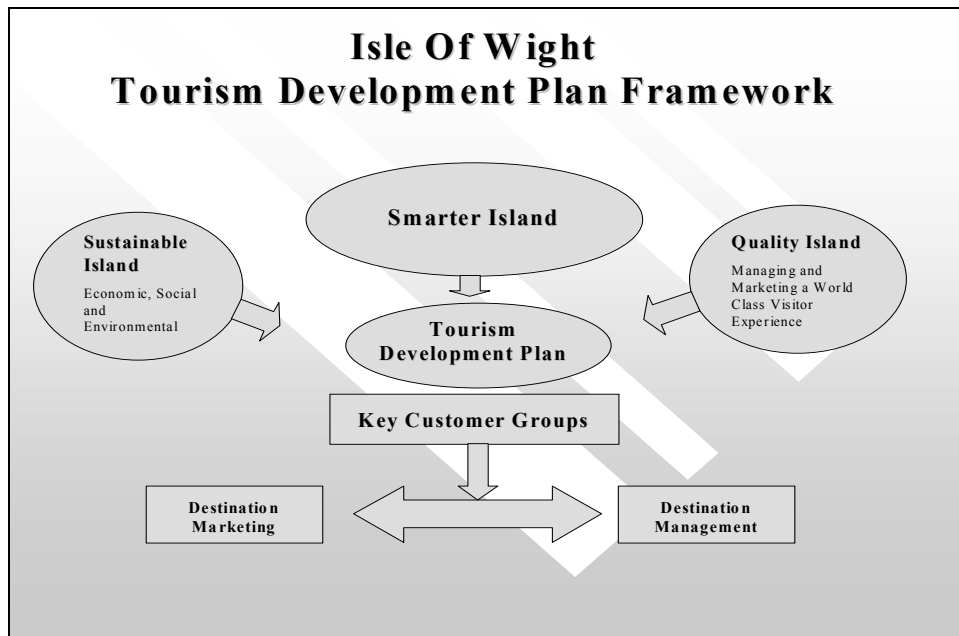
....in the indigenous private sector to regularly invest in their enterprises and human resources and have pride in being an island business

....in the community that tourism can bring a much higher quality of life through improved facilities, services and opportunities.

...in potential inward investors to consider the island as a welcoming, dynamic and viable opportunity

TDP FRAMEWORK

The TDP lays down a basic framework that identifies three key horizontal strands :-



- **Sustainable Island** – tourism growth will need to address economic, social and environmental sustainability issues.
- **Quality Island** – the island should aspire to provide a world-class visitor experience at all levels. This needs to be both managed and marketed.
- **Smarter Island** – provision of targeted and collective improvement opportunities for the private sector to improve skills and professionalism ; to have the public sector responsive, aligned and committed to its role in infrastructure and development investment; and to have greater partnership working at local and regional levels.

The Framework proposes that the priorities for developing the tourism product (**Destination Management**) and the way the island is promoted (**Destination Marketing**) will be determined by identifying the **Key Customer Groups** that will bring the best economic, social and environmental benefits. Vital in this process is a greater integration between destination marketing and destination management than ever before.

KEY CUSTOMER GROUPS

1. Family Fun

Preschool, Traditional and Freestyle Families

The family market is the mainstay of the Isle of Wight's business but currently it tends to be focussed into relatively short periods of the year and, not unsurprisingly, largely tied to school holidays. However, the market can be split into three defined segments :-

- **Preschool** – a holiday with babies and children under 5 can be very stressful and there is an increasing reluctance to go abroad because of safety issues to do with travel, food and healthcare. To target this market the customer needs to be reassured that it can be safe, hassle free and there are specific facilities or services for that age group such as cots, babychairs, buggies, especially adapted bicycles and properly accredited crèches and babysitting. There will also be an increasing consciousness of healthy eating so imaginative menus and enforcement of no-smoking areas will be important. The availability of free play facilities generally on the island or within paid attractions or other tourist facilities such as pubs and accommodation will be crucial. Water quality and beach cleanliness are essential. The availability of high quality baby changing facilities within public toilets, eating out establishments and attractions is also key
- **Traditional** - holidays with children aged between 5 – 12 have different challenges to those with younger children and are primarily based around the school holiday periods. With the impending changes in the school year to fixed two week breaks in April and October and a shorter Summer holiday there are new opportunities. The beaches will continue to be the major attraction in the summer but may lose their appeal in the early and late breaks. Parents can also get involved on a more equal basis with the older children in outdoor activities such as cycling, watersports and horseriding.
- **Freestyle Families** – teenage children are strongly influenced by their peer groups and fashion. They also need to develop their independence and try new activities. Parents may also want their own time safe in the knowledge that their children are being looked after. Outdoor activities and the arts are two potential areas where the island could be seen as 'cool' to teenage children.

2. Chill Out

DINKS (Dual Income No Kids) and SINKS(Single Income No Kids), Empty Nesters (children grown up and moved away)

There are now increasing numbers of people working longer hours and stress is also the most common cause for taking time off work. They are commonly known as 'money rich, time poor' and although they are not tied to the needs

of children they are restricted by their employment. This means they can take breaks whenever they like but they will be in frequent short bursts. The concept of leaving the mainland to go to an island 'retreat' has considerable power for this group. It could involve simply doing nothing for a few days or it could be doing an activity such as golf, sailing, walking or cycling. Pursuits that aid mental well being such as learning to do something or discovering new things will be popular for this customer group. The Rock Festival in its current format has a strong appeal to this group. Rural areas and heritage and garden attractions are important here together with art galleries, museums and rural crafts. Quality of accommodation, eating out and general environment is crucial. They may prefer to travel without their car if the journey is quick and well organised.

3. Close to Nature

Empty Nesters, DINKS and SINKS

This customer group is concerned with and motivated by the natural environment and associated 'Green' issues. The island has distinct natural attributes with its coastal scenery, countryside and extensive provision of walking routes. The Green Island Awards, Gift to Nature project, Bag Tag and the AONB and other designations, already demonstrate the island's commitment to its environment. There would also be interest in the island's wildlife such as the Red Squirrel, birds and butterflies. Walking and cycling would be key activities including off road and safe routes. Local products, particularly organic food, Farmers markets and local produce on menus would have an appeal. They would recognise that travelling without the car needs greater planning and patience but has great environmental benefits. Hence, a car free holiday experience could be very attractive but would entail a fully integrated transport system both on and off the island. Green tourism is also very popular in Northern European countries where there may also be concerns about driving to and in Britain.

4. Its Adventure

Youth, DINKS and SINKS; Freestyle Families: Empty Nesters.

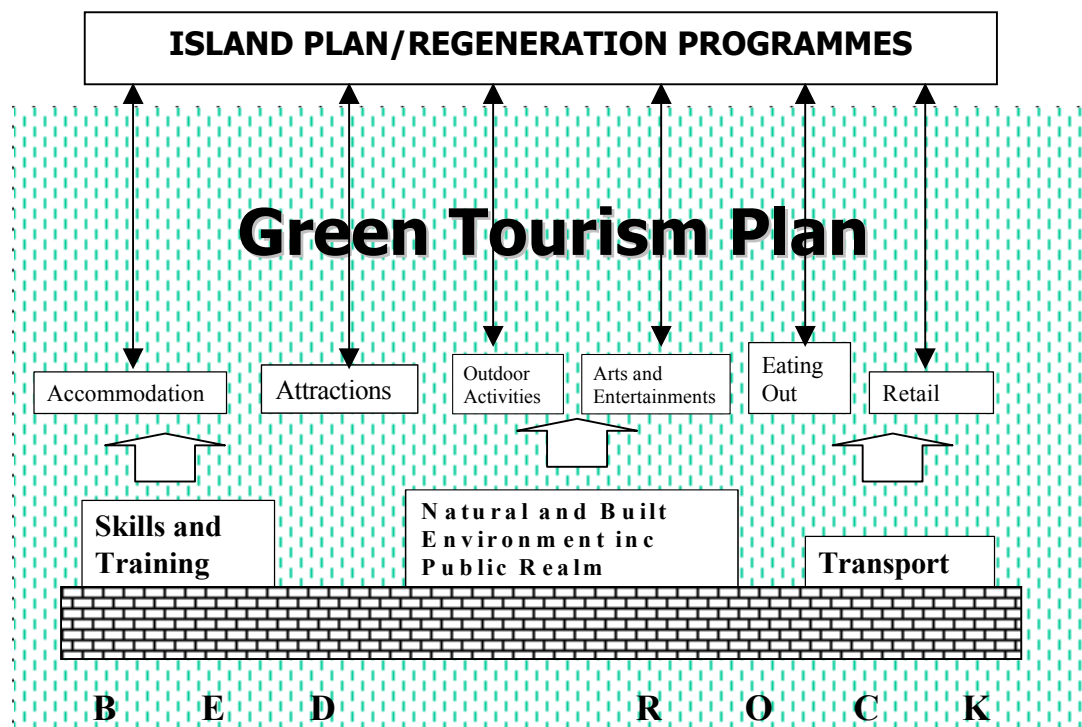
This group is slightly younger although it increasingly includes Empty Nesters and is an all year round market. This group is seeking to challenge itself in both familiar activities and new experiences. However, safety and good instruction are paramount too. The island already has a world-wide reputation for sailing and a growing one for extreme water sports both linked to major Festivals. Land based activity such as mountain biking, horse riding and paragliding also have potential for growth. There are already examples of outdoor activities being used for the corporate incentive and team building markets.

5. Sheer Indulgence

DINKS and SINKS; Empty Nesters; Golden Oldies

An increasing number of people want and are prepared to pay for, an extra special experience. Celebration is probably the main driver where fine dining, pampering, personal service and treats are key elements. Anniversaries, weddings and honeymoons demand that kind of attention. Health and beauty treatments - aromatherapy, Indian Head Massage or facial – combined with saunas, steam rooms and Jacuzzis are popular. High quality local produce and top class service will be key to the eating out experience. Scenic locations, quiet countryside or coastal areas are preferred but standard of facilities could be more important. High quality arts – galleries, arts centres, shops – and high quality heritage attractions such as Osborne House and Brading Roman Villa will be an important part of the mix. The association with the upmarket image of sailing and yachting will be a major advantage to the island.

DESTINATION MANAGEMENT



The Destination Management Plan identifies the key issues for the development of a world-class visitor experience. These can then be adopted into the Island Plan and be used as guiding principles within the Regeneration Programmes

The Plan identifies the '**bedrock**' of the tourism experience as being encompassed by three specific areas :-

- **Skills and Training** – meeting the needs at three levels – front line employees, managerial staff and micro-business support. The co-ordination of the relevant training agencies and particularly the role of the COVE for Hospitality and Catering on the island is crucial to this area.
- **Natural and Built Environment** – support for and co-ordination of AONB, ROW, Countryside and Coastal Protection services as well as the National Trust are essential to the natural environment; the built environment needs to recognise the need for Public Realm Strategies that engender effective co-ordination and delivery within Isle of Wight Council Services. There is also a need to use Planning Obligations and Capital Receipts for investment in public facilities and services and the conservation and interpretation of historical buildings.

- **Transport** – the recent 2020 Transport Vision - A Connected Island covers the main strategic issues. The TDP looks at specific actions to promote car free tourism, integration of public transport on and off the island, support for the Community Rail Partnership and, in the future, raises the possibility of route branding, better access by the sea into Sandown Bay and potential future of the airports.

In addition, the Destination Management Plan addresses six specific sectors as being fundamental to the visitor experience –

- **Tourist Accommodation** – The TDP strongly advocates that the support for the 'inspected only' policy should continue in line with recent national directives . The future viability and development potential of the serviced sector on the island will be addressed via a Hotel Sector Futures Study. Similarly, issues with Holiday Parks over use for residential purposes will be assessed before identifying potential growth. Camping and Touring has little potential for expansion other than for special events. However, Self catering provision is advocated as the one area that has the best possibilities for development on the island.
- **Tourist Attractions** – the consolidation of family and heritage attractions will be necessary in the future. All attractions will need to consider product development innovations, marketing and promotional initiatives, improved revenue generation and staff development initiatives. Any new developments will need to have a strategic fit and, ideally, be in regeneration areas and produce additional visitors to the island.
- **Arts and Entertainments** – the island should make more of the vibrant, artistic community with support for key venues and the development of Cultural Quarters. The extraordinary ability to stage large events gives the island a competitive advantage and there is potential in more "Strategic Events" to boost off peak periods.
- **Outdoor Activities** – Sailing, Walking, Cycling, Extreme Sports (inc Watersports) and Equestrian are identified as the key growth areas for support with particular emphasis given to a "Learn to.." experience with high standards of safety and teaching.
- **Eating Out** - the continued support for the Eating Out Quality Assurance scheme, establishment of a training restaurant through the Catering and Hospitality COVE and a co-ordinated network of local producers are key to maximising the benefits from the growing demand for high quality and value for money eating out experiences.

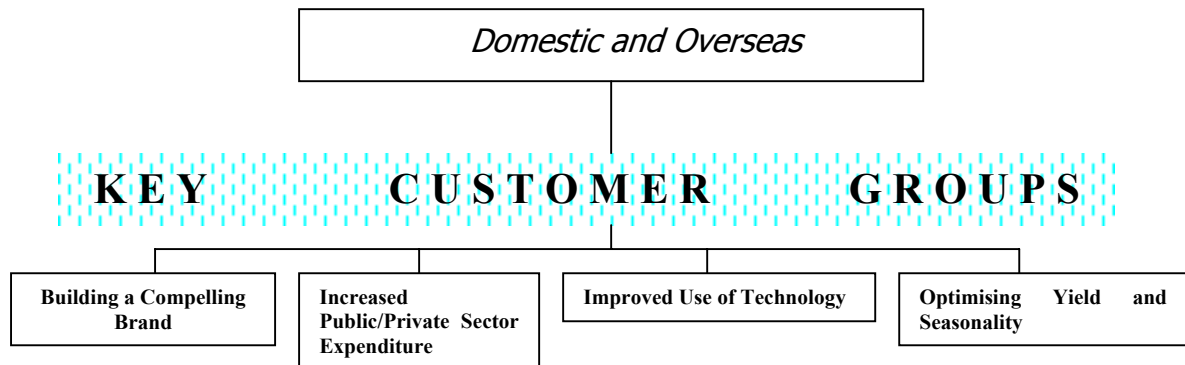
- **Retail** – the development of appropriate and viable retail environment in urban and rural areas is an important adjunct to the visitor experience. Encouraging mix use developments with retail element in regeneration areas and support for specialist retail in rural and attraction diversifications could have mutual benefits. Applications for amusement centres and arcades should be subject to the strictest scrutiny and, ideally, phased out in primary shopping locations. Support for specialist retail that relates to key outdoor activities or arts and cultural provision is also proposed.

A **Green Tourism Plan** cuts across all the Destination Management actions. Key actions here will be business support through the Green Island Awards scheme, developing green tourism products through Island 2000, promoting and developing car free tourism and improving visitors understanding and enjoyment of the environment in conjunction with the AONB/ROW Services.

The **rural economy** will particularly benefit from proposals in the TDP for:-

- Outdoor activities such as walking, cycling and horse-riding
- Promotion of Arts and Crafts trails
- Development and promotion of a Local Producers Network
- Eating Out initiatives such Food Trails, Food and Drink Festival
- Public transport improvements and integration with attractions
- Self Catering Accommodation development and diversification opportunities
- Island 2000 support for Gift to Nature and environmental projects
- AONB support and ROW improvements
- Specialist Retail in rural locations
- Business Support initiatives such Green Island Awards, Welcoming Walkers and Cyclists and general training and upskilling

DESTINATION MARKETING



In an increasingly and highly competitive global market place the effective marketing of a destination is essential. It is also a critical tool in effecting change, developing new markets and shaping people's behaviour.

The **Destination Marketing Plan** identifies four key areas for maximising the promotion of the island as a high profile all year round destination both domestically and overseas:-

- **Adoption of the new Island branding** – Tourism is becoming an increasingly competitive and crowded marketplace and in such an environment, brand image becomes a critical tool in differentiating one destination from another and one product from another. Cross sector support for the new island brand will multiply its impact on improving and changing the perceptions of the island.
- **Building greater partnership working** - Strategic alliances on the island, mainland and abroad will enhance the ability to develop and promote the island and its products.
- **Developing e-marketing** – e-marketing gives businesses of any size access to the mass market at an affordable price and, unlike more traditional forms of advertising it allows truly personalised marketing. However, small businesses in particular still need assistance on finding the best route to the customer and in adapting to the use of technology in their business. Support for an island Destination Management System and training and support for businesses are crucial to maximisation of e-marketing for the island.
- **Optimising yield and seasonality** - it is vital that operators employ yield management strategies that enable them to sell the right experience to the right visitor at the right time and for the right price in order to maximise revenue. E marketing including online booking, effective packaging and efficient response mechanisms will enhance the ability to fill capacity quickly and at the time when it's needed.

Overseas Marketing

In the overseas market it is predicted that there will be substantial growth to Britain (it increased by 11% in 2004) and, currently, the island has a very low proportion of overseas visitors relative to the rest of the region. It is, however, relatively accessible from key UK entry points – ferry ports, airports, Eurostar/Waterloo. The future expansion of Southampton Airport will provide even quicker access to key European markets. The growth of the internet now makes marketing overseas much easier and cheaper and the island will be more proactive in promoting to and servicing of overseas visitors.

WORKING SMARTER

The **Working Smarter Plan** makes recommendations on the composition and role of the Isle of Wight Tourist Board in overseeing the strategic leadership of the TDP . This includes how best to ensure effective integration with the private sector through the Chamber of Commerce Tourism and Industry (CCTI), and having the Chair of the Board linking into the Local Strategic Partnership.

It also re-affirms the actions identified within the Skills and Training 'bedrock' for improvements in private sector abilities and for Isle of Wight Council Services for planning, regeneration, transport and public realm and services issues.

The establishment of a more proactive approach to inner investment through a Development Group approach that involves key Council Services, the Economic Partnership and other relevant bodies e.g. local regeneration groups, TSE, CCTI etc is also proposed

A more co-ordinated and relevant research and monitoring programme with major tri-annual reviews are also proposed to aid 'smarter working'.