DRAFT

TOURISM DEVELOPMENT PLAN

Working Smarter Towards a Sustainable Future

The 2020 Vision for Tourism

August 2005

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EXECUTIVE SUMMARY

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, £25 million 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.

It is an industry with the capability to have long term sustainable growth and the value to the island by 2020 could increase by over 40% if it responds to the changing markets and customer needs.

However, the future of tourism presents a number of challenges. Projections show that, over the next twenty years, tourism worldwide will grow both in terms of visitor numbers and revenue generation. During this period, not only will the demand for quality and value for money increase but also the expectation of a memorable and safe experience will become a high priority.

The island has made great strides in certain areas in recent years and has some major events firmly established in the international calendar that have helped to boost the Spring months particularly. It also has a very busy peak period in July and August. However, there is more to do to make tourism a truly sustainable industry that creates more wealth, better paid jobs and further enhances the quality of life.

The TDP recognises that the island should be part of a global tourism market place and identifies the necessary key developments required. Vital in this process is a greater integration between destination marketing and destination management than ever before.

The TDP identifies the key Customer Groups that the island should target to bring it the best economic, social and environmental benefits for the future.

The **'Bedrock'** of the tourism experience is a better skilled tourism industry and quality of the natural and built environment and transport infrastructure. Enhanced accommodation, high quality eating out and retail provision, expanded strategic festivals and cultural provision and increased development of outdoor and green activities will also be vital in creating a better tourism product.

The industry is dominated by a large number of small and medium sized businesses that have a limited ability to invest and, often, a lack of the necessary skills both within the ownership of the businesses and also the key employees. The TDP proposes a range of initiatives to support businesses operating in accommodation, attractions, catering and retail sectors that will improve the professionalism and viability at all levels. The whole plan will aim to build confidence in the private sector through providing an appropriate structure in which ongoing investment and profitability can be both facilitated and maximised.

Ultimately, the island is a small place and any tourism growth needs to be managed responsibly if it is not to lead to severe social and environmental problems. The TDP outlines how the island can minimise the impact of growth on transport infrastructure and the environment generally as well as contributing positively to other quality of life and social issues.

The widespread adoption of the new island brand, developing e-marketing and building greater partnership working are proposed as the key tools in promoting the Isle of Wight as a high profile all year round destination.

It is crucial to have a committed and responsive public sector if only because a large proportion of the visitor experience is in the public realm – beaches, parks, highways, townscapes, footpaths, toilets etc. However, it also sets down the framework within which new development on the island takes place.

Vital to this commitment is not only the adoption of the TDP per se but also an on going ability to engage with the private sector and other associated partners in evaluating, adapting and improving the TDP. These can then be fed into other future strategic plans and relevant development processes.

The private sector itself needs to be galvanised and speak with 'one voice' so that all the partners can move forward in an agreed way.

The TDP proposes that the Isle of Wight Tourist Board should be the focal point that brings together these key groups. The Board should also have access to a strong support structure of research and monitoring to enable it to make an effective evaluation of the success of the TDP.

The TDP advocates that, ultimately, 'Working Smarter' and 'Building Confidence' at all levels are the key ingredients in driving forward the necessary actions to maximise tourism's economic, social and environmental impact on island life.

INTRODUCTION

The Isle of Wight sits on the fringe of one of the most prosperous regional economies in the world but is far enough away to be different.

In strategic terms, the Regional Tourist Board (TSE) regards it as a sub region of the South East whilst SEEDA, the Regional Development Agency, has given it Special Policy Area status through the SE Plan.

The new Planning Act, which came into force in 2004, requires local authorities to replace the current Unitary Development Plan (UDP) with a Local Development Framework (LDF). This is intended to streamline the local planning process and promote a proactive, positive approach to managing development and delivering change. It also provides the island with a unique opportunity to put in place the necessary structures to encourage and enable an exciting and prosperous future.

The Local Strategic Partnership (LSP) is preparing the Island Plan 2020 Vision for the holistic development of the island which will be an essential element of the guidance for the LDF. Tourism and its role in regeneration is one of the key areas for the Island Plan.

Tourism should be seen as a catalyst for change in the island economy and community as a whole. Increasingly, the quality of life is as important a factor in the decision of inward investors and re-locators as it is to the indigenous population. Hence, the standards of leisure facilities, arts venues, retail outlets, eating out establishments and transport options all play their part in making the island an attractive and viable option for new investment. Moreover, the expenditure generated directly into these areas by visitors is vital to their continued survival and development.

The Tourism Development Plan will seek to ensure that the Isle of Wight maximises the potential of the tourism industry and enables it to grow in a way that is economically, socially and environmentally sustainable. It will set the foundation for a long-term vision to 2020 and will be encompassed within the wider Island Plan.

More specifically, it will identify the following :-

- ❑ Short Term Actions – 1 – 3 years
- ❑ Medium Term Objectives – 5 - 10 years.
- ❑ Long Term Vision – 2020

THE VALUE OF TOURISM

It is sometimes forgotten that the support for tourism is based on the same economic development aims of employment and wealth creation as any other sector. Increasingly the effectiveness of support for tourism requires to be demonstrated in these terms.

However, what makes tourism 'different' to other sectors and particularly where it is a major part of the economy, is the significant impact it can have on the overall quality of life of the resident population.

Tourism Product

An audit carried out by Isle of Wight Tourism in 2005 identified over 1500 commercial accommodation establishments on the island (see Page 13). This includes 400 Hotels and Guest Houses, 1000 units of self catering and 80 Holiday & Camping parks accounting for nearly 44,000 bed-spaces.

An earlier audit in 2003 identified a further 848 food and drink establishments and over 300 attractions and leisure enterprises as tourism related.

There are five main harbours or marinas on the northern part of the island – Cowes, Yarmouth, Newport, Island Harbour and Bembridge – and a much smaller haven at Ventnor on the southside. Cowes has 7 major sailing clubs and is the base for the UK Sailing Academy.

Visitor Numbers

The Isle of Wight Tourism Monitor Annual Report 2004 recorded 2.66 million visits arriving by ferry. This includes overseas and UK visitors and comprises both staying trips and day trips for leisure and business travel. Island resident movements and visiting yachts are not included in this survey (although the STB study 2000 estimated 197,000 yachtsmen came to Cowes alone during the year plus another 50,000 at UKSA).

Ferry statistics show that in 2003 there were 9.27 million passengers carried during the year. Assuming the visits recorded by the Monitoring Survey are one way and hence need to be doubled to account for the movement off the island, then tourism related traffic accounts for 2.63 x 2 = 5.26 million passenger movements. This is 57% of all ferry passenger traffic.

- ❏ Staying Visitors account for 1.56 million (59%) of the visits
- ❏ Day Visitors account for 1.07 million (41%) of the visits

Five Year Trend - Since the Monitor began in 1999 there has been an overall increase in visitor numbers of 0.3% with increases in staying visitors (+ 6%) being offset by falls in day visitors (- 8%).

Staying Visitors

Although only 7% of the staying visitors were from overseas in 2004 it was the highest ever recorded level and up 16% on the year before. Domestic visitors accounted for 93% of the trips.

❑ Domestic Staying visitors – 52% stayed in commercial accommodation (hotel, self catering, caravan, tent). This equates to 5 million bednights. 38% were staying with friends and relatives (VFR) whilst second homes accounted for 6% of type of accommodation used.

❑ Overseas Staying Visitors – 44% of overseas visitors were actually on a day trip. Of those on a staying visit (approx 97,000) 41% were visiting friends and relations, 38% (37,000) specifically on holiday and 14% on a business trip. An estimated 350,000 bednights were taken up in commercial accommodation.

Five Year Trend - Domestic staying visitors has fallen by 0.6% and Overseas Visitors increased by 15%. In the domestic market there have been increases in short breaks (+19 %) and decreases in long stay visits (-11%). VFR has fluctuated but is largely unchanged.

Length of stay

The average length of stay is 4.4 nights but there is wide variation:-

❑ Hotels - 5.1 nights
❑ Guest Accommodation – 4.2 nights
❑ Self catering - 11.1 nights
❑ Static Caravans/Chalets – 4.9 nights
❑ Touring caravans/tents – 6.6 nights
❑ VFR - 4.1 nights
❑ Second home/caravan – 7.5 nights

Five Year Trend - Domestic length of stay has fallen from 4.8 to 4.4 nights. Short break stays have been fairly static at 2.3 nights whilst long stay visitors has fallen from 6.9 to 6.7 nights.

Day Visitors

The largest proportion (51%) of domestic day trips was for leisure (472,000). Business Travel generated 362,000 trips and VFR 162,000 trips. Overseas visitors made 80,000 leisure trips and 4,000 and 5,000 for Business and VFR respectively.

Five Year Trend - Fallen by 8% since 1999. VFR and Business day trips account for the decreases whilst Leisure day trips have actually increased.

Socio-economic profile

A profiling study in 2003 of 8,000 staying visitors to the island revealed that the three most dominant market segments (based on CAMEO UK Groups) were :-

Affluent Home Owners	25%
Wealthy retired neighbourhoods	16%

Smaller Private Family Homes	16%

However, the remaining 43% of the visitor profiles were predominantly classified as being from poorer home owners and tenants and less affluent segments and mostly in the C1C2 DE social groupings.

Visitor Expenditure

The Monitoring Report * records the total visitor spend on the island for 2004 as £361 million pa comprising :-

- ❑ £291 m from domestic staying visitors,
- ❑ £ 34 million from overseas staying visitors and
- ❑ £ 34 million from domestic day visitors and
- ❑ £ 3 million from overseas day visitors.

The Cambridge Model (Sandown Bay 2003) provides a further breakdown of where that expenditure takes place :-

	Staying Visitors	Day Visitors
Accommodation	34%	-
Food and Drink	21%	52%
Retail	17%	13%
Attractions	10%	16%
Transport	19%	19%

*** Value of Yachting -** The Report only records data on visitors travelling to the island by ferry. It does not record data on visits to the island made by other forms of transport particularly visiting yachtsmen. However a STB study in 2000 estimated that this may be worth £19m directly to Cowes and £5.5 million to the rest of the island.

In addition, many of the businesses concerned are locally owned and subsequently leakage off the island is relatively low compared to other sectors. The multiplier of wages paid to staff, purchase of local supplies and services and regular refurbishments create additional benefits across the economy. Tourism is a "final good", all the final touches have to be provided on the Isle of Wight and so the value is captured here. Tourists travel to the 'factory' to consume the product i.e. they travel to the destination to enjoy their holiday. Extrapolation of the estimates of supplier and income induced spending in the Sandown Bay study suggest that this multiplier effect could generate a further £150 million in the local economy.

Employment

In the region, tourism provides employment for more than 225,000 people (around 8% of the region's workforce). This rises to 403,000 people when related industries are included (9.5% of regional employment) (Source: SEEDA).

The 2001 Census figures for the Isle of Wight show that 9.7% of employment is directly in the Hotels and Catering Sector. This equates to 5,285 people. Similarly, NOMIS Labour Market Statistics shows tourism related employment (accommodation, eating out, museums, sport and leisure) to be 5,620 and 11.2% of employee jobs.

However, other sectors such as retail and transport are heavily dependent on tourism and The Value of Visitors study (2004) estimates that the tourism related employment is actually 12,865 or 24% of the total workforce on the island.

A Cambridge Model study of the Sandown Bay area in 2003 estimated that indirect and induced employment adds another 42% to the direct jobs. Using the NOMIS base figure this would give a total of approximately 8000 jobs that would be supported by tourism spending which is 16% of the employee jobs.

In real terms, because of the nature of the seasonality and temporary employment in the industry and the islands greater reliance on, for instance, cross solent transport and yachting (800 jobs supported by expenditure of yachtsmen STB 2000), the figure for actual jobs is probably between the two at approximately 20%. This would equate with similar tourist areas in the UK where there are equivalent bed-space and population levels.

Tourism has a reputation for providing low-grade jobs that are mainly seasonal and poorly paid.

However, 10 years ago, tourism was little known at degree level. Now 60% of secondary schools are offering GCSEs or A Levels in tourism and leisure. There are over 2,000 FE courses in tourism and related subjects offered in the South East alone. Most sectors within tourism and leisure have a higher proportion of graduates than the national average and 16% of jobs in tourism are management jobs.

In addition, it is an invaluable source of employment for particular groups within society, and often in areas where no other jobs exist – ethnic groups, women returners to work, older people, school leavers. It is also a people industry where customer care and communication skills are transferable and are for life. It is ideal for offering flexible working hours, low barriers to entry and sometimes a dynamic and vibrant customer facing environment.

Tourism is also populated by thousands of small businesses that are largely family run or employ less than 5 people. These businesses are the bedrock of an economy such as the island has where large employers are few and far between. Micro-business support and growth will be one of the key aims of the Tourism Development Plan.

The island has a Centre for Vocational Excellence (COVE) for hospitality and catering which will play a major part in equipping the workforce with the necessary skills and to build career structures to support a more sustainable industry.

Quality of Life

The extent of facilities and services that are created by tourism are varied and substantial and give island residents a much greater choice and quality than would normally be available to a population of 133,000. The level of retail, eating out, leisure, arts, attractions, activities and public transport would be much poorer or simply not exist without the additional 2+ million people that come to the island each year. The island has a particularly strong provision of marina and dock facilities that without visitors would not otherwise be available to residents.

Cross Solent Travel is heavily supported and subsidised by visitors coming over to the island. In the peak season over 12 crossings an hour from 4 ports provide residents, businesses and visitors with regular and reliable means of travel and access to the mainland.

The tourism industry also contributes to the preservation of the built and natural environment. Visitor related uses can provide new life for historic buildings and tourism developments can be the catalyst for the regeneration of derelict sites. Through visitor payback schemes contributions can be made directly in projects to directly enhance or preserve environmental projects.

Creating a Positive Image

Tourism can help raise the awareness of places, change perceptions, create interest and encourage inward investment and civic pride. The success of festivals and events and the links through the community can have far reaching effects on people's identification and integration with their local area. A place that people want to visit is usually a good place in which to live and work.

Across a broader spectrum Tourism encourages :-

❏ Diversity of employment
❏ Inclusion, participation and development of potential
❏ Lifelong learning activity
❏ Community Capacity building
❏ Social renewal and raising of aspirations
❏ Entrepreneurship
❏ Healthy Living and Well Being
❏ Success and Celebration of Local Distinctiveness and Cultural identity

THE CHALLENGES FOR TOURISM

There are three primary challenges in the development of tourism on the island :-
(i) Meeting customer needs
(ii) Building confidence
(iii) Ensuring Sustainability

Tourism needs to be aware of and adapt to the changing needs of potential visitors. Studies show that the visitor of the future will be diverse and demanding and typified by the following :-

- ❏ Increased numbers of older travellers- who will be healthier and richer
- ❏ Increased interest in holidays that promote good health and well being
- ❏ More holidays in which arts, culture and history play a prominent role
- ❏ Continued increase in the use of the internet for searching and booking
- ❏ More demand for destinations with high environmental excellence
- ❏ A continuing trend for shorter holidays because of time pressures
- ❏ Combining holidays with hobbies, interests and learning experiences
- ❏ Increasingly discerning customers who expect and demand quality and value

But, ultimately, the challenge is to **Build Confidence**……..

...in the visitor 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

And, tourism development must be :-

Economically Sustainable

Through creating wealth and improved viability in business and providing better paid and higher skilled jobs. Key to this is reducing seasonality and increasing yield from tourism.

Socially Sustainable

It should result in an overall better quality of life for island residents. It can provide better retail, leisure, eating out and transport provision and should address where it could assist in resolving issues relating to public realm, congestion and housing problems.

Environmentally Sustainable

It should ensure that the natural environment is conserved and enhanced and be proactive in the minimisation of pollution, energy use and green field development.

How does the island compare with other UK Destinations ?

Accommodation Quality

Isle of Wight Council was one of the first local authorities to operate an 'inspected only policy' for the use its services i.e. all accommodation operators must have been rated by the RAC/AA/VisitBritain(ETC). Now, over half the local authorities in Britain do so. This has resulted in a higher than average participation in the ratings scheme than nationally or other comparable regions.

Total Bedspaces and % Rated by AA/RAC/ETC

Type	No of est	Units	Pitches	Bedspaces	No Rated	% Rated
Hotels	116			7355	67	58%
Guest Acc	285			4983	180	63%
Self catering Independent	600	864		5243	183	30%
Self catering Agencies - 7	440	440		2435	440	100%
Holiday Parks with T&C	58	2953	2315	19778	34	59%
Touring & Camping only	21		1345	4035	10	48%
Total	1520	4257	3660	43829	914	60%

The national average of participation in the ratings scheme is 47%. At 60% overall the island is well above average.

Level of Quality

In terms of levels of quality ratings by sector there is comparative data on mean ratings against which the island can measure itself :

Hotels - % of establishments in each category - stars						
	1 star	2 star	3 star	4 star	5 star	Mean
England	3	44	44	8	1	2.6
Cumbria	4	60	35	1	0	2.33
South West	5	53	36	6	0	2.43
Wales	4	35	45	14	3	2.8
Scotland	3	25	48	22	2	2.95
IOW	2	60	36	2	0	2.4

Guest Accommodation - % of establishments in each category - diamonds

	1 D	2 D	3 D	4 D	5 D	Mean
England	0	6	45	45	4	3.47
Cumbria	0	2	40	54	4	3.6
South W	0	4	41	49	6	3.57
Wales	4	27	55	13	2	2.85
Scotland	3	21	52	22	1	2.94
IOW	0	3.5	40	54.5	2	3.5

Self Catering - % of establishments in each category - stars

	1 star	2 star	3 star	4 star	5 star	Mean
England	2	10	45	38	5	3.34
Cumbria	0	4	42	45	9	3.59
South W	1	9	47	38	5	3.37
Wales	0	5	22	55	20	3.96
Scotland	6	25	46	23	0	2.86
SE	2	18	47	24	3	2.9
IOW	1	13	43	36	1.9	3.1

Holiday and Touring/Camping Parks - % of establishments in each category - stars

	1 star	2 star	3 star	4 star	5 star	Mean
England	0	5	25	48	22	3.87
Cumbria	0	2	15	43	40	4.21
South W	0	3	20	61	16	3.9
Wales	N/a	N/a	N/a	N/a	N/a	N/a
Scotland	0	6	24	53	17	3.81
IOW	5	9	31	41	14	3.5

SWT Intelligence Project The Tourism Company 2003

This indicates that, although it might have a high proportion of participation in all sectors, the island's accommodation is falling below the average levels of quality rating in the hotel, self catering and Holiday and Touring Parks sectors although Guest Accommodation compares favourably.

Occupancy Rates

The Quarterly Monitor 2004 shows the following average bed-space occupancies achieved in commercial accommodation;-

	Quarter 1	Quarter 2	Peak	Quarter 4	Yr Ave
Serviced	21%	50%	71%	38%	40%
Self catering	18%	63%	94%	43%	54%
Holiday Parks	16%	62%	86%	48%	53%
Touring/Camping	7%	37%	78%	26%	47%*

* Quarter 1 excluded in average.

There is a lack of comparable national data for sectors other than the serviced accommodation.

In the National Tourist Boards UK Occupancy Survey 2004 the annual average bedspace occupancy for England was 46%, Scotland 44%, Wales 41% and for the UK overall 45%. However, these figures include a wide range of establishments from 5 star hotels in cities to the smallest diamond rated B & B. Hotels in Seaside areas are separately identified with a UK average bedspace occupancy of 42%. The island is 2% below this level.

Peak Season

It is clear that relative to the rest of the UK and even in the SE the island has very high peak season occupancies across all sectors but falls below average in the other periods of the year. For example Devon records peak occupancy of 64% for self catering (IOW 94%), 78% for holiday parks (IOW 86%) and 55% for Touring & Camping (IOW 78%).

Value

Estimates of value on tourist expenditure are made using established formulas and, hence, it is difficult to assess whether the spend per visitor on the island is any better or worse than comparable destinations.

The socio-economic analysis (see Page 7) suggests that nearly half the visitors to the island are from the lower socio economic groups is cause to conclude that value could be increased. Relatively low occupancy rates out of the peakseason is also another indicator.

However, the value can be increased/decreased if the mix of visitors changes. For example, if there is a reduction in day visitors or Visiting Friends and Relations(VFR) causing an overall drop in visitor numbers but there is an increase in staying visitors then the value may still increase because of the higher spend attributed to staying visitors.

There is a need to regularly assess levels of real visitor expenditure through visitor surveys.

THE 2020 VISION

The Local Strategic Partnership's 2020 vision for the island is :-

"A progressive island built on economic success, high standards and aspirations and a better quality of life for all."

Tourism as a key player in economic regeneration can and should play a major part in achieving that vision.

However, if it does nothing then :-

❑ Tourism is based on the past where the traditional summer holiday ruled and the island has a high dependence on the coach and school groups market
❑ The industry will not tap into relevant growth markets
❑ Many jobs will continue to be seasonal and of low quality
❑ Some tourism operators will continue to be trapped in a downward spiral unable to invest in quality of facilities or workforce
❑ Tourism's value and contribution to the local economy diminishes in real terms
❑ More traffic congestion and negative impact on local communities
❑ More harm to the environment and quality of life
❑ Loss of higher quality businesses
❑ Withdrawal of public sector commitment

Or it has a vision of :-

" ...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." (TSE – Tourism ExSellence)

This can be translated into the following long term key objectives for tourism on the Isle of Wight :-

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

Forecasting Growth to 2020

It will be important for the economic sustainability that the TDP aims to grow the value and not just the volume of tourism in the long term. The growth will also need to take into account social and environmental issues. The current occupancy data indicates that there is little room for increases in the volume of visitors during the peak. Moreover, issues caused by seasonality dictates that all the growth in volume should be in off peak periods. However, this should not prevent increases in value coming out of the peak periods through premium pricing strategies.

Research undertaken in the South West has concluded that during the 1990's tourism grew in line with disposable income at 2% pa and over the next 10 years that there will be the following growth per annum :-

	Trips	Spending*
Short Breaks 1- 4 nights	+5.8%	+5.3%
Long Holidays 4+ nights	0.4%	Nil net growth
VFR	+7%	+2.4%
Overseas	+3.5%	+2.5%
Day Visits	+2.1%	+2%

*Net increase in spend exc. Inflation.

In making the future projections it is assumed that the overall trend towards short and additional holidays will continue. Growth in spending overall is projected at 2.6% pa.

The projection based on past relationships between growth in income and spend on holidays in England is likely to be modified by :-

- ❑ An overall aging of the population with growth in the 45+ age groups but also some growth in the 15 – 24 age groups
- ❑ A gradual increase in the proportion of the population falling within the ABC1 socio-economic groups
- ❑ Increases in single people with no children in the 16 – 34 age group and an increase in the 55+ age groups and some decline in the number of families with young children.

The changes in the population aging and in socio-economic composition, with higher spending groups tending to increase faster than the average, could result in an increase of up to 1% pa over the projected spend set out above.

Implications for Isle of Wight

Based on these average levels of annual growth if the island can meet the changing customer expectations it could expect to see the following position by 2020:-

	2004 data	Net Growth pa	2020 Projection
Staying Visitor Spend	£325 million	2.6%	£452 million
Day Visitor Spend	£37 million	2%	£48 million
Total Spend	**£362 million**		**£500 million**
Staying Visitor Trips	1.5 million	4.4%	2.49 million
Day Visitor Trips	1.1 million	2.1%	1.45 million
Total Trips	**2.6 million**		**3.94 million**

Hence, by 2020, the island could see a 40% growth in expenditure (at 2004 prices) to just over £500 million and a 50% increase in visitor trips to 3.9 million – over 1.3 million more than in 2004. This will mean, in terms of cross solent traffic, an extra 2.6 million passenger movements a year – an increase of 28% on the current capacity of 9.3 million.

The number of bednights spent on the island would increase from 5 million to 7 million pa. These would mostly come in short breaks out of the peak periods.

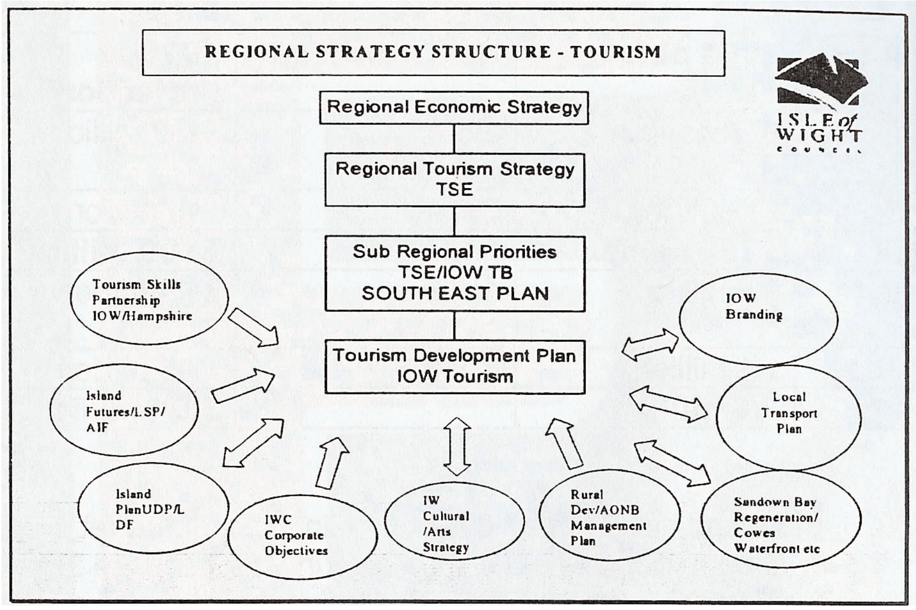
If cars increase in the same proportion it could result in an extra 170,000 cars per annum as a result of visitor related activity.

Hence, it will be important that the TDP focuses on ;-

(i) How to grow volume in the off peak and
(ii) How to grow car free tourism visits

STRATEGIC HIERARCHY

The TDP must be consistent with other regional and local strategies as well helping to influence those that are emerging.



TSE Sub Regional Priorities in Tourism ExSellence

- ❑ Capitalising on the special appeal of being an 'island' making the crossing part of the experience and overcoming perceptions of the difficulty and cost of getting there.
- ❑ Positioning the Isle of Wight brand to maximise both its product strengths and potential growth markets.
- ❑ Raising adequate resources to market tourism and achieving a better integration between IOW Council, tourism industry, TSE and other partners.
- ❑ Reducing seasonality and developing an all year round, sustainable and profitable tourism industry.
- ❑ Generating more support for tourism on the island from politicians and residents and a greater recognition of its importance to island life.
- ❑ Becoming more IT focussed to respond to changes in the way customers access information and book holidays.
- ❑ Improving product and service quality to meet the needs of tomorrows visitors
- ❑ Attracting new investment as well as encouraging indigenous growth to improve basic infrastructure, particularly in the urban areas, and regenerating Sandown Bay
- ❑ Managing tourism to protect environmental quality and safeguard the interests of the local community.

The South East Plan

The emerging SE Plan recognises :-

"The need to improve the tourism offer to one that focuses on a higher quality, higher value product."

And should seek to do this through :-

(i) Support for quality hotel development and conference facilities
(ii) Support for appropriate tourism related retail facilities
(iii) Support for tourism related centres of vocational excellence including any associated academic establishment
(iv) Exit strategies for redundant tourism accommodation coupled with contributions to improved tourism related infrastructure.

Island Plan

The draft Island Plan sets out the 2020 Vision from the Local Strategic Partnership (LSP) :-

"A progressive island built on economic success, high standards and aspirations and a better quality of life for all."

and is led by economic regeneration that "supports growth and investment in tourism" as well as other key sectors.

TOURISM DEVELOPMENT PLAN FRAMEWORK

It is proposed that the TDP has two key horizontal themes of Sustainability and Quality. However, the catalyst to help drive and implement effective change should be the public and private sectors working in a Smarter way :-

Sustainable Island

With tourism growth comes responsibility and the TDP will seek to ensure that the recommended actions address economic, social and environmental sustainability issues.

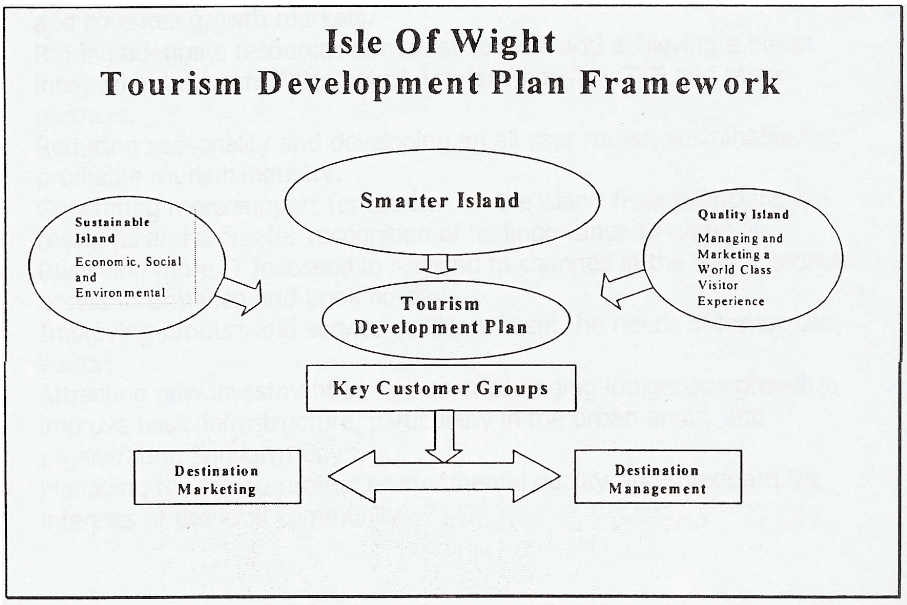
Quality Island

The island should aspire to provide a world-class visitor experience at all levels. This needs to be both managed and marketed. Critical to this will be an overarching Destination Management Plan that deals with the whole Visitor Experience Chain.

Smarter Island

Making it Happen - the TDP will identify ways of providing 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.

Having established these as the fundamental criteria for the framework it is proposed that the **needs of Key Customer Groups** should guide the development of the tourism products and services. This will require greater integration between destination management and destination marketing than has been the case to date.



KEY CUSTOMER GROUPS

" The Customer is King. Any industry that does not focus on the needs, expectations and requirements of its customers is doomed to failure " (Scottish Area Tourist Board)

Increasingly and especially for short breaks and first time visitors, people are less interested in a destination for its own sake and more interested in the experience they are likely to have.

Five key groups have been identified that will maximise the economic, social and environmental benefits :-

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. Some preschool children also holiday with grandparents - this can be to give the parents or single parent a break and is often out of the peak season. 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. Imaginative toddlers pools, availability of armbands and special sessions for younger children need to be considered in leisure complexes. 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. Family attractions and activity providers, however, will have an extended opportunity to provide for this age group. Children are more independent at this age and so the ability for informal games and sports, Children's Clubs and opportunities for discovery will be important. 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. Outdoor Activity Centres, Music Festivals and provision of social facilities for young people within accommodation and attractions may be key. Could have potential as a short break associated with an event or activity.

2. Chill Out

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

Despite predictions to the contrary ten years ago, there are now increasing numbers of people working longer hours. 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. They tend to be very loyal once they have found what they want. They also work hard but need to wind down and recharge their batteries. 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. Alternative therapies such Reiki, Shiatsu, Reflexology, Meditation and Yoga are increasingly fashionable. 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 is primarily concerned with all those areas that effect the quality of the 'visitor experience chain' and how that might need to change. It also explores how the island should determine the quality and relevance of new development.

In more definitive terms quality is about :-

- ❑ Meeting and exceeding customer expectations
- ❑ Increasing visitor satisfaction resulting in more repeat business and recommendations
- ❑ Increasing economic viability
- ❑ Improving the reputation of tourism as a credible and worthwhile sector of the economy
- ❑ Helping to build a reputation for the island of a high quality of life

Complaint monitoring over the last few years by Isle of Wight Tourism indicates that visitors consistently complain about the following :-

- ❑ Poor attitude towards the visitor from the manager / proprietor
- ❑ Poor quality of facilities and services
- ❑ Cleanliness
- ❑ Poor customer service
- ❑ Poor standard of service / food / catering
- ❑ Misleading Information
- ❑ Overcharging
- ❑ Poor public facilities and amenities such as public conveniences

The 'Bedrock' for Development

It is proposed that the quality of the island visitor experience should be underpinned by three basic foundations :-

1. Improvement in Skills and Training
2. Quality of the Natural and Built Environment
3. Improved Transport Infrastructure

1. Skills and Training

Tourism is a service industry and as such is highly dependent on the quality of business owners, managers and front-line employees.

It is dominated by a large number of small and medium sized businesses that have a limited ability to invest and, often, a lack of the necessary skills both within the ownership of the businesses and also the key employees. This includes many 'lifestyle' businesses that don't necessarily aspire to grow or to improve their product and service.

General employment in tourism is typified by high turnover due to seasonality, part-time working, low pay and skill levels and lack of progression. However, in recent years tourism businesses are increasingly complaining about the shortage of labour on the island and some have turned to using foreign workers. Indeed, the labour market of the future will be characterised by :-

❑ low unemployment rates and subsequent recruitment difficulties
❑ demographic changes resulting in less young people and more older people in the indigenous population and
❑ because of the expansion of the EU, the increased availability of foreign workers

Hence, Tourism will need to engage much more positively with the labour market if it is to beat off the increased competition from other sectors for limited skilled labour.

This should include :-

❑ Emphasising the opportunities for people of all ages, gender, ability and economic circumstance.
❑ Considering how to engage the 45+ age group in particular
❑ Presenting itself as a sector that relies on common, generic and transferable skills to move from one part of the industry to another
❑ Providing leadership and management development opportunities which will influence the ethos of businesses towards excellence, improvement and staff development

The 'Working Smarter' ethos also includes ensuring a co-ordinated approach between the various training providers on the island and the industry.

The TDP advocates that the priorities for action are in the following areas :-
❑ Support for micro-businesses
❑ Training for front-line employees in a range of tourism and cultural sectors
❑ Support for management development
❑ Effective delivery and support for relevant COVE's

Short Term Actions :-
❑ To establish relevant training programmes and one to one support services for owner operators to improve business skills.
❑ Assist the industry to access effective business advice
❑ Support new entrants to the industry
❑ Raise the awareness of and engagement in quality standards

throughout different sectors of the industry
❑ To improve the overall standards of skills in hospitality and catering and employees in the industry generally
❑ To address the basic skill needs of foreign workers and ensure the provision of adequate staff accommodation .
❑ To introduce a 'Welcome Island' programme of Customer Service
❑ To improve the image and perception of jobs in the tourism and cultural sectors

Medium Term Objectives :-
❑ To ensure the sustainability of the COVE for tourism, hospitality and catering on the island
❑ To increase the number of tourism and cultural employees with NVQ 3 or equivalent to 50%
❑ To increase the number of accommodation operators engaged in the NQAS to 80% of the total stock
❑ A strong support network for existing and new micro-businesses

2020 Vision :
❑ A more highly skilled and qualified local workforce
❑ Reduced staff turnover and improved staff retention
❑ Habitual good practice and high standards amongst business owners
❑ Tourism seen as a credible and positive career opportunity

2. Quality of the Natural and Built Environment

Natural Environment

The natural environment is the key asset for the future of the island's tourism development. It is the arena that will supply the basic products for a number of the Key Customer Groups – Its Adventure, Chill Out and Close to Nature in particular. High quality beaches will not only continue to be essential to the traditional and freestyle family holiday market but will also feature in extreme sports, beach soccer and general leisure use.

The conservation and protection of the island's natural environment is overseen by a number of agencies as well as private landowners. The Isle of Wight Council is a key player as it has control of several major services on the island such as the AONB Service, Rights Of Way Network, the Countryside Service, the Coastal Protection Service and the Beaches and Parks service. In addition, there is the National Trust which owns a substantial amount of land and property, English Nature and the Wildlife Trust.

The TDP acknowledges the role played by the relevant agencies and confirms the need to support the respective strategies.

Short Term Action

❑ To support the AONB Management Plan in integrating the AONB into marketing, event development and interpretation.
❑ To support the ROW Improvement Plan
❑ To secure the investment required to enable the island to maintain and increase the number of Seaside and Blue Flag Beach Awards
❑ To support the CPS in securing funding to maintain and develop the coastal areas
❑ To integrate more with the National Trust, English Nature and the Wildlife Trust in promoting the understanding, enjoyment and preservation of the respective environments.

2020 Vision

❑ **To establish the island as nationally renowned as an important and treasured landscape**

Historic and Built Environment

There are almost 2000 Listed Buildings on the Island. Of these, 28 are Grade I, which are buildings of major national importance. The Island currently has 24 designated Conservation Areas identified for their special architectural and historic merit.

The Isle of Wight Society (1995) identified over 50 different heritage linked locations on the island of which the English Heritage properties dominate - Osborne House, Carisbrook Castle, Yarmouth Castle and Appledurcombe House. The National Trust also has 5 historic properties and in 2004 the Brading Roman Villa development added another very high quality heritage attraction to the island.

There are also a number of private Manor Houses that can provide a more intimate and less commercial visitor experience.
The island's strong maritime connections are portrayed in a number of small museums across the island – Cowes Maritime Museum, Classic Boat Museum, Shipwreck & Maritime Museum, Ventnor Heritage Museum, East Cowes Heritage Centre, Museum of Smuggling History, Marine Heritage Exhibition. However, there is no high profile centre on the island that celebrates its long associations with the sea. In view of the strength of sailing and yachting, the recent achievements by Ellen Macarthur, Shirley Robertson and the presence of UKSA this would appear to be a potential development opportunity. UKSA has also recently purchased Gypsy Moth IV with a view to it being permanently located on the island. However, any such development must clearly distinguish itself from the National Maritime Museums at Greenwich and Falmouth.

The Isle of Wight Council's **Museum Service** broadly distinguishes two major areas of interest - that of geology, and that of human history of the Island, and these are developed as themes within the museums run by the Service. To this end, Dinosaur Isle was originally established **"To be a national centre of excellence in the conservation, display and interpretation of the Island's dinosaurs and diverse geological heritage"**, The island is one of the best locations in Europe to find fossils and dinosaur remains and should continue to utilise this strength to attract visitors.

Securing an international designation such as World Heritage Site status would bring considerable credibility to the islands geological importance and boost the area worldwide as a green tourism destination. The Coastal Protection Service is proposing that this is a possibility following on from the designation of the adjacent Jurassic Coast of East Devon and Dorset.
Heritage in all its forms has particular appeal to some of the Key Customer Groups – Sheer Indulgence, Chill Out – and the overseas markets e.g. USA, Australia, Japan.
The TDP recognises the importance of the historic buildings and landscapes to the future of tourism and supports the respective agencies and services in ensuring the conservation, enhancement and interpretation of the island's heritage

Short Term Actions :
❑ To support the preservation and enhancement of the island's built environment and to raise awareness of the importance of good design in achieving quality development
❑ To maximise the wealth of historic buildings and landscapes on the island in promoting to key markets
❑ To support the continued development of Dinosaur Isle as a National Centre of Excellence
❑ To support the consolidation of heritage attractions where appropriate e.g. Marine Heritage Centre
❑To support an application for World Heritage/GeoPark site status

Medium Term Objective
❑ To establish Dinosaur Isle as a National Centre of Excellence for dinosaurs and geological heritage
❑ To secure World Heritage/Geo Park status

2020 Vision
❑ To have a high level of understanding about the importance of historic and built environment and resources and advice to ensure its preservation and enhancement

Public Realm and Infrastructure

The existing public infrastructure, facilities and services are vital to the visitor experience and the local authority spends millions of pounds each year in maintaining it. Also, as the planning authority, Isle of Wight Council has a major influence on the quality and design of new development within the private sector.

However, future restrictions on local authority funding mean that both the existing expenditure and any new development opportunities will be under pressure.

The Environment Services Directorate in the IW Council operates many key services including planning, highways and engineering, property services and IW Tourism. Hence, an integrated and focused view on the importance of the maintenance and improvement of public realm and facilities will be essential.

Knowing the scale of the problem is very often the best starting point and regular audits of esplanades and key public areas looking at public toilets, street furniture, lighting, litter bins, railings, buildings, signing etc should be established. Strategies for the public realm should be common place including the adoption of a 'Zero Tolerance' policy with on going alert and inspection regime that would identify and deal with problems quickly. Ensuring that the public authorities are aligned at the practical level includes improving internal commitment and 'bending spend' to ensure minimum standards as well as exploring potential external methods of delivering improved services and facilities.

The increased use of Planning Obligations, such as 106 agreements, on developers should be used to assist in raising extra investment into the public infrastructure and facilities. The re-investment of capital receipts from the sale of Council owned land or property into public facilities and services could also be an option.

The private sector also plays in part in the aesthetics of town and village centres. Some parts of the main shopping areas in the resorts could benefit from shop front improvement schemes and these should be encouraged as part of the regeneration programmes.

The Island in Bloom concept would assist in improving the overall welcome at the gateways to the island as well as dressing up town and village centres during the main part of the tourism season. Community support for Island in Bloom will be crucial to its long term sustainability

Short Term Actions:

- ❑ To obtain the Council's agreement to and adoption of the Tourism Development Plan
- ❑ To support the Council in the adoption of Public Realm Strategies in all major towns (and villages) on the island
- ❑ To undertake an quality audit of all esplanades and key tourist areas to assess condition of toilets, street furniture, street lights, seats, paving etc
- ❑ To encourage the Council to adopt a 'Zero Tolerance' policy with an improved inspection and enforcement regime with regard to the public realm
- ❑ To encourage a greater use of Planning Obligations such as 106 agreements and re-investment of Capital Receipts to secure funding for improvements in the public facilities and infrastructure
- ❑ To encourage shop improvement schemes within the regeneration programmes
- ❑ To improve gateway areas and town and village centres under the Island in Bloom initiative.

Medium Term Objectives

- ❑ To have a regular monitoring and refurbishment programme for the public realm in place
- ❑ To have secured wholesale private sector and community support for the improved quality of the public realm

2020 Vision

- ❑ **To have a world class public realm**

3. Transport Infrastructure

The actions identified under the TDP are entirely consistent with the recent 'Transport Vision – A Connected Island' approved by the IW Council :-

" Our vision for transport is an integral part of the overall 2020 vision for the future of the Island, which leads to a more prosperous, accessible, healthy, environmentally friendly Island. At the heart of this 2020 vision is the economic regeneration of the Island, which in turn is dependent on the development of the Island's transport system."

"......where all methods of transport including walking and cycling with public transport form an interlinked transport network across the Island, the Solent and beyond. This enables travel of people and goods from wherever they are, to the destinations of their choice both on and off the Island, with safety, reliability, ease of access, and affordably at a convenient time."

The forecasts for growth of tourism alone, let alone any residential increases, has major implications for the transport network and if extra visitors are being asked to travel to and around the island without their car then there needs to be an infrastructure and service to support that.

Within the Green Tourism Plan (see Page 53) there are a number of actions aimed at promoting and developing more car free tourism to and on the island.

Currently the majority of the accommodation stock on the island is in the Sandown Bay area so the transport infrastructure feeding that particular part of the island is vital and access by road, cycle, rail, air and the sea needs to be addressed in the Bay Regeneration Programme and the LTP 2.

The proposed bid for a Private Finance Initiative (PFI) is intended to resolve long term problems with the maintenance and quality of the roads on the island as well as, in future phases, to develop integrated transport and cross solent travel provision.

The future viability of Island Line railway is a concern although a Community Rail Partnership has been established recently to focus a greater resource on promoting and developing the service. The impending Ryde Interchange development should also assist the line as well as the integration of transport generally. Other interchanges should be supported for the gateways to the island.

In recent years, the Tourist Brown Signing system has been inconsistent and poorly maintained resulting in an over proliferation of signs many of which are in a poor condition. This has been addressed recently with an audit and record of all signs, a new policy and application process and proposals for an ongoing bi-annual audit. In the medium term, a form of official route branding for major roads on the island should be considered that may also help reduce the number of brown signs required and encourage greater use of public transport.

Other general traffic signing is also poorly maintained in places but will potentially be dealt with under the PFI.

The increased promotion and development of safe cycling routes, footpaths and bridleways will be an important part of reducing the use of cars even if visitors do come to the island in their car.

Short Term Actions

❑ To support and encourage the provision for Car Free travel on the island – Also see Green Tourism Plan

❑ Feed the TDP recommendations into the LTP 2 and

Regeneration Projects

- ❑ To support the Council's application for a PFI to upgrade the road and other infrastructure on the island
- ❑ To support the Ryde Interchange project
- ❑ To support rail development and promote use by visitors
- ❑ To put in a place a sustainable Tourism Brown Signing policy, process and bi-annual audit

Medium Term Objectives

- ❑ Investigate access to Sandown/Shanklin by sea as part of the regeneration projects – marina/pierhead development
- ❑ To support further Interchanges at Gateways to the island
- ❑ To investigate the development of the most effective use of the island's airports including the potential for a heliport at Sandown Airport
- ❑ To investigate the concept of Route branding for the main tourist routes around the island.

2020 Vision

- ❑ **To have a fully integrated and viable transport system that enables visitors to travel with safety, reliability, comfort and convenience.**

DESTINATION MANAGEMENT

1.Commercial Accommodation

In 1994, the Isle of Wight was one of the first UK destinations to introduce an inspected only policy for accommodation and now over 50% of destinations in the country have followed suit. Harmonisation between the inspection bodies (AA/RAC/ETC) and, more recently, between Scotland, Wales and England have re-enforced the credibility of this policy. Although it is recognised that any inspection scheme will never be perfect or cover all types of provision or, indeed, ever afford to stand still, the principle of accreditation of quality is a sound one.

The new Visit Britain Strategy **'Quality in Tourism'** recognises the role of quality in stimulating investment in service and facilities, raising productivity and boosting profitability. It also notes that **"quality assurance needs to be in tune with the lifestyle of our customers and meets and satisfies their needs."**

It proposes a target increase in participation in the star ratings scheme across all accommodation sectors from the current 47% to over 80% by 2010. At 60% (see Page 12) the island has a participation rate that is currently higher than the national average but has mean ratings that are generally below average.

The adoption of the TDP is an opportune time for the island to re-affirm its support for an inspected only policy across all commercial accommodation providers and to continue to work with the inspection agencies to maximise participation and improvements of mean ratings on the island.

Short Term Action :

❑ To re-affirm support for an inspected only policy in order for accommodation providers to access official marketing and other tourism services

❑ To work with inspection agencies on increasing the participation on the island and the improvement, where appropriate, of those already participating

Medium Term Objectives

❑ To raise the participation rates to 80% and mean ratings to the highest for any comparable UK destination.

2020 Vision

❑ **To align the island's accommodation offer with the aspiration for a world class visitor experience**

Serviced

The provisional analysis of the serviced sector shows that although there is a high participation (61%) in the Quality Assurance schemes, the levels of quality would appear to be at best average relative to other comparable UK destinations. There is concern that many medium and large hotels and guest accommodation are too reliant on the coach and school groups market. This tends to be low margin, high volume business which has an uncertain future and isn't particularly viable in terms of indirect spend on other tourism related services and facilities. Future market growth would appear to be with customers who will be increasingly discerning and demanding even in the coach markets.

In order to facilitate a better understanding of the way the island's serviced accommodation operates and what future there may be for the sector, a Hotel Sector Futures Study has been commissioned. This will also provide evidence for the Local Development Framework and Regeneration Programmes on potential Hotel development for the island. It will look particularly at the effect of the current Hotel Retention Policies under the UDP and possible exit strategies that could be encompassed within the new LDF.

Short Term Action :
❏ Commission Hotel Sector Futures Study - TSE

Holiday Parks

This sector has, nationally, been one of the fastest growing with large improvements in quality of chalet and caravan accommodation standards and on site leisure facilities. However, in recent years, two factors appear to have combined on the island that have created problems with residential occupancy of sites ;-

(i) In order to develop an all year tourism season the local authority has allowed permission for extended opening periods to 46, 48 or even 52 weeks of the year
(ii) Operators have increasingly focused on sales of caravan/chalet holiday homes rather than operating hire fleets. This is primarily because it releases a short term capital injection and is seen as less 'hassle' in terms of recruiting staff to clean hired fleets and the extra management time involved in promoting them.

Subsequently, purchasers of chalets/caravans have become full time residents on some parks which appears to have been allowed by the park owners. In turn, the local authority has also been unwilling to enforce the terms of the planning permission and site licencing with regard to holiday use.

The British Holiday and Home Parks Association (2004) warns operators against the serious implications that can flow from this situation including insurance, health and safety and legal issues as well as the threat, particularly on mixed used sites, of deterring genuine holiday usage because of the "very different and unwelcoming appearance" that residential use can bring. The local authority is also concerned that such usage creates an unplanned burden on public services such as health and education.

A second issue with holiday parks is that in recent years a number of sites on the fringes of the urban areas have become surrounded by other permanent housing and commercial developments raising issues about the continued desirability of the site for holiday use.

The analysis of Holiday Parks taking part in the Quality Assurance schemes also shows a below average level of quality when benchmarked against other areas in the UK.

The issues surrounding Holiday Parks on the island are complex and in the absence of any generic or specific research on this sector it will be necessary to undertake a specific study that can make an accurate assessment of the variety of stock, its ownership and the respective issues on the island. It will also assess future market growth for this sector.

Short Term Action

❑ Commission Holiday Parks Audit and Futures Study

Self Catering

Self catering on the island mainly takes the form of holiday cottages, houses and flats and is an important component of the rural and coastal economies. In recent years it has had particular relevance to farm diversification and rural regeneration.

The Isle of Wight Tourism audit in 2005 recorded 1300 units of self catering across the island. A study by Southern Tourist Board in 2003 found that :-

❑ The market on the island is highly seasonal with an average number of 20 weeks sold pa – peak weeks averaged 83% falling to 13% in the winter

❑ 40% of operators reported an increase in demand in recent years

❑ Domestic families on holiday were the single most important segment

❑ The average weekly tariff of £345 was just slightly below the regional average.

The Quarterly Monitor 2003/4 recorded higher levels of occupancy - 94% in the peak down to 18% in the winter. These peak figures are probably some of the highest in the UK.

Only 8% of visitors that come to the island and stay in commercial accommodation, will use self catering. But the average length of stay is the highest of all commercial stock - 11.1 days.

The quality assessment of the sector on the island shows a below average level of rating achieved relative to other UK areas.

The STB study also identified the following key market aspirations in relation to the self catering product :-

- ❑ Customers tend to be younger and more likely of child rearing age
- ❑ Whilst families are the core market, letting agencies have noted increasing demand from a number of other user groups notably ;-
    - ❑ Childless Couples wanting to participate in activity holidays (DINKS/SINKS)
    - ❑ Empty nesters and retired couples

- ❑ An increasing demand for larger units, to house two families sharing or a large group
- ❑ Healthy demand for high quality accommodation, towards the 4 star and 5 star end of the market
- ❑ Reasonable proximity of shops, pubs, places to visit and things to do e.g village locations
- ❑ A more service-oriented environment, including emphasis on welcome and ancillaries such as meals, baby sitting and laundry
- ❑ The increasing importance of off season lets and short breaks, requiring a large catchment within a 2 hour drive time
- ❑ Ancillary leisure facilities, whilst not necessarily the key driver of demand, may be of particular help in building out of season trade.

This sector would appear to have the greatest potential for growth in terms of increasing the supply and quality on the island and also in terms of increasing yield. Self-catering also supports other services such as shops, food and drink and attractions.

Short Term Action :

- ❑ Support and encourage appropriate new self catering development particularly in rural areas
- ❑ Encourage upgrading to 4 and 5 star standards
- ❑ Review as part of the Hotel Sector Futures Study

Medium Term Objective

- ❑ To increase provision of high quality self catering on the island

2020 Vision

- ❑ **To increase the value of tourism to the island through more and higher quality self catering that operates throughout the year**

Touring and Camping

IW Tourism data identifies 21 specific touring sites on the island although many static caravan sites also take touring and camping. The Quarterly Monitor shows that approximately 8% of visitors stay in this type of accommodation. Occupancy is around 80% in the peak season falling to 37% in the Spring and 19% in the autumn. Few sites are open in the winter.

The quality assessment shows a high participation in the quality assurance schemes but a below average level of rating achieved compared to other UK areas.

At the moment the UDP presumes against any new touring and camping sites from operating outside the holiday season – May – October.

Whilst the demand for camping and caravan holidays appears to have levelled out since the rapid rise in interest in the 1970s and 1980s, they are still a popular activity and there is increasing demand by users for sites to be fully serviced and of high specification. However, there remains only limited scope for additional sites, or extensions to existing facilities, if the very fine landscape character of the island is to be safeguarded.

It is important that the impact of caravan and camping development upon the environment and nature conservation interests is minimised. The visibility of sites, both close to and from longer distant views, and the ability of the local highway network to accommodate caravans, are crucial factors.

However, future trends for green tourism experiences, the growth of some overseas markets e.g. Dutch market and more single sex and younger groups attending festivals may help the relatively low occupancy rates of existing sites in the Spring and Autumn.

Short Term Action :

❏ Encourage existing sites to participate in Green Island Awards

❏ Integrate sites with Festival and Special Event Promotions and Overseas Marketing

Medium Term Objectives

❏ Monitor need for developments of further sites

❏ Increase occupancy rates in the Spring and Autumn

2020 Vision

To have a thriving and profitable Touring and Camping sector

Second Homes

The Census 2001 identifies 3.8% of housing on the island as being a second residence or holiday accommodation. Although this is higher than the national average, when compared to similar tourist areas in Devon, Cornwall or Wales it is still relatively low :-

❏ North Cornwall -	8.1%
❏ North Devon -	4.4%
❏ South Hams -	11.0 %
❏ Devon -	3.5%
❏ Cornwall & Isles of Scilly -	4.6%

However, in common with these other areas, second homes can be concentrated in particular villages and small communities causing very localised impacts. On the island, nearly 20% of homes in the Seaview, Freshwater (Norton) and Gurnard wards are classified as 'second homes with no residents'.

One of the concerns is that most of the expenditure by visitors staying in second homes goes to owners outside the area. However this may be offset by :-

❏ Visitor expenditure occurs across a range of services other than the accommodation itself e.g. shopping, eating out – this would tend to be retained in the area

❏ Expenditure by home owners locally on rates, services (housekeepers, gardeners), maintenance and refurbishments. The Cambridge Model (2003) estimates this as being in the region of £1000 per property.

❏ There may be a proportion of second home owners who actually live on the island. Due to escalating property prices in recent years there has been a large growth in investment in properties for let as holiday and residential use.

The Quarterly Monitor shows that 6% of visitors to the island stay in a second home or static/chalet that they own.

Short Term Action :
❑ Review as part of Hotel Sector Futures Study and Holiday Park Audit and Market Study

Medium Term Objectives
❑ To reduce the loss of housing stock to second home owners

2020 Vision
To have enough housing stock to meet the island's needs

2. Tourist Attractions

The island has a large and diverse range of visitor attractions. IOW Tourism lists at least 60 discrete venues in its Attractions Miniguide 2005. The Tourism Baseline Audit 2003 identifies 200 possible places of interest for visitors. The island has a particular strength in heritage attractions.

The Quarterly Monitor shows that, in recent years, visits to attractions generally, has been in decline and that new visitors are more likely to go to attractions than regular or VFR visitors. This highlights the on-going need to refresh and update the content of attractions in order to encourage visitors to return but also might point to an over supply.

The Quarterly Monitor also shows that as much as 38% of the 1.4 million staying visits are with friends and relations (VFR) on the island – over 20% of overseas visitors are also staying with friends or relatives. Key activities for the VFR market include visits to attractions and eating out and are generally prompted by the host. So increasing awareness amongst the resident population of attractions on the island could serve to improve numbers. International experience with "be a tourist in your own town" or "Resident First" promotions have increased local and visitor use of attractions and eating out venues.

Changing visitor demographics have also made it increasingly difficult for family attractions. The Quarterly Monitor shows that 75% of leisure visitors to the island are adult only groups – a complete reverse to the position 20 years ago. Other factors are :-

❑ The average length of stay is now also only 4.4 nights which restricts the amount of time available for visits to attractions
❑ Visitors are increasingly coming for outdoor activities – walking, cycling, water-sports

❑ Projections on population growth show a fall in number of families and a rise in empty nesters and households without dependents.
❑ The strong dependence on coaching groups that are almost exclusively older adults

Attractions, like accommodation operators, are also faced with higher customer expectations with regard to quality, service, value for money and overall 'memorability' of experience.

A recent global study by the Scottish Tourist Board identified the following critical success factors in visitor attraction management ;-

❑ Product development Innovations – new concepts, consumer directed technology, animation and realisation
❑ Marketing and Promotional Initiatives – partnerships, repeat visit incentives, lifecycle extension initiatives, seasonality extension initiatives
❑ Revenue Generation and Funding – on site retail and catering, corporate hospitality, stay longer on site initiatives
❑ Education and Training – managerial qualities, training and HR developments
❑ Community and Public Sector Intervention – community relationships, quality assurance measures

Existing attractions on the island should be encouraged through the Business Support programmes to consider all these aspects.

The volume of attractions on the island means that very careful consideration should be given to any proposals for new attractions. The priority should be given to improving the quality of all existing attractions to meet changing consumer demands and to help improve viability.

Proposals for both new and upgraded attractions should be judged against the following criteria :-

❑ Do they fit with the Key Customer Groups ?
❑ Will they facilitate regeneration ?
❑ Are they complementary to existing attractions (or will they displace business) ?
❑ Do they provide wet weather facilities and help extend the season ?
❑ Are they accessible by public transport and/or incorporate a Green Travel Plan ?
❑ Do they help reinforce the distinctiveness of a locality ?

It is likely that there will be fewer traditional attractions on the island in the long term. This could be because of outright loss or, perhaps, through the need to pool resources. In some cases, access issues may require a degree of consolidation of specific themed attractions. Integration with new accommodation or retail developments may be another solution. However, these could be replaced by a greater number of, say, outdoor activity providers, health and spa services, eating out and retail.

Short Term Action

- ❑ To ensure relevant business support and training for attractions
- ❑ To create initiatives to encourage awareness in VFR market
eg Island Open Day
- ❑ To encourage the adoption of Green Travel Plans for key attractions linking to accommodation providers on the island
- ❑ Support appropriate diversification and innovations within existing family attractions
- ❑ Support for existing attractions development in regeneration areas – Dinosaur Isle, Marine Heritage Centre

Medium Term Objectives

- ❑ To focus new attraction developments in the regeneration areas
- ❑ Under the LDF, to enable some attractions to change use or consolidate

2020 Vision

To have a thriving and profitable attractions sector

3. Eating Out

Almost every visitor to the Isle of Wight is interested in food and drink. Self-catering, B & B and VFR account for over 70% of the staying visitor market and there are fewer accommodation operators in the serviced sector wanting to provide evening meals. In addition, the majority of day trip visitors will also require catering at some stage of their visit.

The Cambridge Model estimates that at least 20% of expenditure by staying visitors and 50% of day visitors spend is on food and drink. This equates to £83 million each year on the island.

The UK market is currently growing due to the high levels of media and consumer interest in quality food. There is also a drive towards healthy eating to combat obesity, particularly in children, and other health issues. Overseas visitors will be interested in local produce and traditional local dishes.

The island has been one of the first in the UK to run a Quality Assurance scheme for eating out and helping catering establishments at all levels to improve their quality and presentation of food, service and efficiency and overall cleanliness. This is now being adopted nationally by Visit Britain.

The island currently has one Michelin star restaurant.

The Centre of Vocational Excellence (COVE) in Catering and Hospitality will be central to the ongoing development of standards of eating out on the island. This includes the creation of a training restaurant.

A Farmers Market also takes place every Friday in Newport and there is an Isle of Wight Farmers and Producers Association

There are several areas where the island could move forward :-

- ❑ The establishment of a single industry led body to co-ordinate standards, marketing and supply of local produce
- ❑ Support and development of the Farmers Market
- ❑ Promotional initiatives such as a Food Trails, Food and Drink Festival etc
- ❑ An IOW Food Award Scheme voted on by visitors
- ❑ Greater collaboration between food and drink producers, restaurants, shops and accommodation operators

Short Term Actions :

- ❑ To promote the COVE for Hospitality and Catering to eating out Venues to improve catering and service skills
- ❑ To support the establishment of a Training Restaurant via the COVE
- ❑ To promote the Quality Assurance Scheme for eating out
- ❑ To encourage all eating out establishments to become no smoking
- ❑ To establish an annual IOW Good Food Award based on nominations from visitors
- ❑ To support the establishment of a single industry led body to co-ordinate standards, marketing and supply of local produce
- ❑ To establish an annual Food and Drink Festival
- ❑ To develop and promote Food Trails

Medium Term Objectives

- ❑ To have all the island's eating out establishments participating in the Quality Assurance scheme and using local produce where appropriate
- ❑ To secure at least one other Michelin star restaurant on the island

2020 Vision
To establish the island with a reputation as a high quality and value for money destination for eating out

4. Arts and Entertainment

The island is home to a vibrant artistic community and has a varied provision of facilities within the arts sector both public and private sector as well as through various Trusts and the voluntary sector.

The Isle of Wight Council's Arts Unit has four strategic aims :-
- ❑ **Providing regular access to high quality arts**
- ❑ **Developing a stronger artistic sector to bring greater creativity to the Island.**
- ❑ **Promoting arts in supporting tourism.**
- ❑ **Enhancing our environment through public and environmental art.**

It oversees public facilities such as the Theatres at Shanklin, Ryde and Medina and the multi-purpose Quay Arts Centre. Promotional initiatives include the production of island Arts and Crafts Guide and an Arts Map promoting an Open Studios Week in August across 24 different venues. It also supports carnival and celebratory arts including the Learning through Island Events Project that is aimed at supporting individuals and organisations who are involved in running events on the Isle of Wight. This has gained accolades nationally and the island has forged links with other major carnival events such as Notting Hill.
The Isle of Wight Literary Festival is also gaining in strength and receiving support via the Arts Unit.
As well as a regular programme of high quality exhibitions, live entertainment, film and workshops, Quay Arts operates a very successful Summer School that attracts many staying visitors.

The Arts Unit has also co-ordinated a number of Public Art projects including the award winning Seaview Duver Coast Protection Scheme. It has supported Island 2000 in the delivery of other projects such as Ventnor Way Markers, From Source to Sea (six sculptures along the course of the Eastern Yar River)
The Koan at St Mary's hospital, the Cowes Floating Bridge and Boat Trail and The Brading Dragon and The Brading Bull. In 2005 the What If ? Esplanades programme secured Arts Council funding for public art on the sea fronts.

Private Sector arts provision includes galleries and studios. Ten are identified in the Arts and Crafts Guide but the Open Studios week in September utilises over 50 different venues.

There are two other theatre venues on the island - Trinity at Cowes and the Ventnor Winter Gardens. Dimbola Lodge museum, the home of pioneering Victorian photographer Julia Margaret Cameron, has a comprehensive programme of photographic exhibitions and workshops as well as music and illustrated talks.

On a broader level of appeal the island has the Cineworld Multiplex, Planet Ice (which also doubles up as Ryde Arena) and LA Bowl. Osborne House is also staging major musical and other events on a regular basis.

The role of arts activities and facilities in the quality of the experience of the Chill Out, Close to Nature and Sheer Indulgence Customer Groups will be increasingly important. Hence, the integration and support of the arts and the on-going investment into venues and facilities is vital to the aspirations of the TDP.

The development of 'Cultural Quarters' particularly around the Quay Arts complex in Newport and Shanklin Theatre should be considered as part of the respective Regeneration Projects. Funding schemes such as Arts for Business and Percentage for Art will enable private sector contributions to the provision of public art.

The development of residential arts based workshops and Summer Schools concepts throughout the off peak periods of the year could assist in boosting occupancies. The development of niche Arts Festivals, possibly themed on particular strengths of the island e.g. photography, literature, should be explored.

Public Art projects on Esplanades, gateways and in regeneration areas can enhance the identity and local distinctiveness and should be integral to Public Realm strategies.

Short Term Actions

- ❑ To ensure the inclusion of Public Art in Regeneration Projects
- ❑ To encourage the development of Niche Festivals – Film, Photography, Literature
- ❑ To package arts workshops and schools with accommodation
- ❑ To support Carnival Arts Development
- ❑ To Secure investment for key venues at Shanklin and Ventnor
- ❑ To support and encourage the use of Ryde Arena and Osborne House as concert venues

Medium Term Objectives

- ❑ Development of Cultural Quarters in Newport Harbour, Shanklin
- ❑ Establishment of National Centre of Excellence for Carnival Arts
- ❑ Establish Island wide Public Art

2020 Vision

To establish the island as a premier destination to learn, enjoy and experience a wide variety of arts based activities

Festivals and Special Events

Festivals and events have become increasingly important to the island in recent years for the following reasons :-

- ❑ Major Strategic Events can generate additional tourism business, more spending, jobs etc
- ❑ They provide a persuasive reason to visit often out of the main season
- ❑ They secure media coverage that raises the profile of the location and showcases the best attributes
- ❑ Benefits flow to many associated businesses
- ❑ They provide opportunities on the island for use of public transport
- ❑ They require and stimulate partnership and can build community morale

In recent years the island has established a number of Festivals that are officially referred to as the Key Strategic Events. They are :-

- ❑ The IOW Walking Festival – May – 14 days – PR coverage of £93k in 2004
- ❑ IOW Music Festival – June – dominated by the Nokia Rock Festival over 3 days – creating £8 million visitor spend/£1 million PR in 2004
- ❑ Skandia Cowes Week - August – 8 days – est 2.1 m visitor spend/£3 m PR coverage for Skandia
- ❑ IOW Cycling Festival – September - 9 days - £3k PR coverage
- ❑ White Air Extreme Sports Festival – October – 10 days – est. £60k PR coverage

These events receive specific financial and logistics support of the Councils Cultural and Leisure Services Events Team. There are many other events on the island that also receive such support on an annual basis and the Team will also initiate and coordinate with event organisers on an ad-hoc or one off basis. The Council has also created an Events Safety Group to co-ordinate with major event organisers at the earliest stage on issues to do with licensing, Health & Safety, highways and emergency services.

The main principles of the Festival and Events Plan are :-

- ❑ To agree and establish the key Strategic Events for the island in partnership with relevant partners .
- ❑ To use the Strategic Events as an integral part of the branding to create "top of the mind" awareness of the island for tourism and commerce both domestically and overseas
- ❑ To targeted Strategic Events to have the greatest positive economic, social and environmental benefit to the population of the island

❑ To ensure that Strategic Events should be unique, differentiated and showcase the island's attributes, and generally be of a world class standard to appeal to a world wide audience.
❑ To ensure that all Events are supported by appropriate, effective institutional arrangements with adequate resources
❑ To ensure that all Events organisers should regard the Isle of Wight as an innovative and "hassle free" events destination.
❑ To ensure that Events take place throughout the year but to aim to develop at least eight Strategic Events during the year

There are already a number of events that could be moved to the level of being Strategic Festivals – Jazz Divas (April), Motocross (May), Wight Diamond (May), Beach Soccer/Sports (July/ August), Powerboat (September),Ryde Carnival (September), the Bestival (September) - there may be potential for establishing the following additional events:-

❑ Niche Arts Festival/Artists Schools – April/May
❑ Food and Drink Festival – Autumn
❑ Festival of the Coast – Autumn
❑ Wight Christmas Festival - December

Short Term Actions
Establish IOW Events Board to :-
❑ Provide a strategic direction for Festivals and Events so as to maximise financial and other resources into the Key Strategic Events and any one off celebrations.
❑ To identify potential future Strategic Events by \ encouraging the establishment of new events or development of existing events
❑ To compile a calendar of future Festivals and Events on the island and make freely accessible to interested parties
❑ Allocate Grant funding and/or support for Festivals and Events
❑ To consider and resolve infrastructure and support issues with regard to major events on the island.
❑ To link with the Events Safety Group
❑ To encourage accommodation and transport operators to develop packages associated with the events
❑ To promote integrated green travel options on all Strategic Events

Medium Term Objectives
❑ To create at least eight different Strategic Events on the island
❑ To increase occupancies by in the Spring and in the Autumn

2020 Vision
To establish a world class reputation for the island as a venue for Festivals and Special Events

5. Outdoor Activities

The island has relatively large provision for both formal and informal outdoor activities and has particular strengths in a number of specific ones. The island's environment is also ideal for learning as it doesn't consist of extreme terrains or isn't subject to extreme weather conditions. Hence activities such as walking, cycling, horse-riding, sailing and watersports can be done in relative safety.

Four out of the five official Strategic Festivals are based around outdoor activities – The Walking Festival, Cowes Week, the Cycling Festival and White Air Extreme Sports. But in recent years there have been a number of other niche outdoor activities and sports that are beginning to see the island as a key base.

The TDP is focusing on the promotion and development of the following five Key Activities that have a particular strategic fit :-

Sailing/Yachting

The island has a global reputation for sailing at the centre of which is Cowes known as the 'Home of World Yachting'. It is also the base for the UK Sailing Academy (UKSA), seven major sailing clubs and, more recently, double Olympic gold medal winner Shirley Robertson and world record holder Ellen MacArthur and her team. A considerable cluster of maritime industry exists in Cowes and East Cowes as well as a diverse range of associated businesses such as specialised clothing, equipment, photography, arts etc.

A study in 2000 by STB, estimated that £25.9 million was spent by visitors coming to Cowes due to the attraction of yachting. These same visitors also spent a further £8.1 million elsewhere on the island.

In addition, approximately 33,000 yachts visited Cowes of which 73% stayed for at least one night. Nearly half were involved in racing events. This equated to 200,000 Yachtsmen during the year and an expenditure of £18.7 million in Cowes and £5.5 million throughout the island. £8 million was spent on eating and drinking in Cowes, £6 million on marine goods and services and £3.8 million on mooring fees and accommodation.During Cowes Week the study estimates that yachtsmen spent just over £3.1 million and visitors £1.5 million.

The Royal Yacht Association (Watersports Participation 2003) estimate that between 2 and 2.5 million people in the UK participate in " all forms of boating under power or sail". Participation in sailing nationally is projected to increase by 5% pa.

Locally, UKSA has reported a strong growth in the demand for training and learning to sail packages. This has been caused by the increasingly sophisticated technology for yachting systems and the drive towards high standards of licensing and competence. This has created a global shortage of yacht skippers, qualified instructors, waterfront managers and resort managers. Indeed, 20% of UKSA clients come from overseas. UKSA also report that 70% of their clients are career change professionals choosing sailing or water-sports as their future vocation.

There is also provision on the island for yacht charters, RIB and powerboat hire.

Sailing and boating has particular relevance to Freestyle Families, Its Adventure and Sheer Indulgence Customer Groups

Walking

The island has the most concentrated and highly regarded network of public rights of way in the UK with 319 miles of footpaths including a 67 mile coastal path around the entire island.

The range of walking opportunities on the island is typified by the annual Walking Festival that also happens to be the largest in the UK and possibly in Europe. It is an activity can be adapted to fit in with nature and wildlife study, fossil hunts, Ghost walks, pub walks, heritage, gardens etc.

The island doesn't have extreme terrains as seen in Scotland or Switzerland for instance, so casual walking is the strength. However, for those that wish to have a walking holiday on the island there is the BagTag service which moves luggage from stop to stop.

Walking has particular relevance to the Chill Out and Close to Nature Customer Groups but is being increasingly enjoyed by families. With the growth in awareness and appreciation of exercise in improving mental and physical health it is anticipated that walking both as the main holiday purpose and as an ancillary activity will continue to grow. It is, however, limited with regard to packaging as a holiday activity unless it is specifically tied in with an activity such as nature study.

Cycling

Cycling has increased in popularity as a leisure pursuit due to the introduction of the mountain bike – over 10% of the population now own a mountain bike. There are primarily two types of user – casual and the rugged enthusiast and the island can cater for both.

There are over 200 miles of cycle routes including the 62 mile Round the Island route. There are eight off road cycle ways that have been developed as part of the National Cycle Network (Sustrans) that are ideal for the casual user. In addition, the annual White Diamond mountain biking festival has developed 40 KM and 60 KM endurance rides whilst the Cycling Festival in the Autumn has 3 hills, 7 hills and 14 Hills cycling/orienteering events. The Isle of Wight 'Randonnee' is an annual 100KM cycle ride and a mini-randonnee of 30KM, which is usually held on May Day Bank Holiday.

The island is used by at least one tour operator for cycling holidays as part of a joint package with the New Forest crossing from Lymington and uses a variety of accommodation from hostels to country house hotels. There would appear to be more opportunities to develop this connection.

Good signage, road safety and well maintained cycle tracks are important to the casual users so the expansion of off road routes will be essential. In order to encourage more visitors to cycle once on the island, there needs to be a greater degree of cycle hire facilities and cycle friendly transport.

The Green Tourism Plan (see Page 53) identifies a number of actions for the promotion and development of cycling.

Extreme Sports

The recent surge in interest in the island as an extreme sports destination is largely due to the development of the White Air Festival at Sandown. As well as a range of water-sports it has developed skate boarding, BMX, mountain boarding and even street luge.

It has raised the profile of the island with a younger audience typified by the Its Adventure Customer Group and has great potential with the Freestyle Families group too.
There are also a number of established water-sports operators that can provide tuition and equipment hire for surfing, windsurfing, kite-surfing, wakeboarding, waterski-ing and kayaking.

Appley Beach at Ryde is now also the UK's only permanent Beach Soccer venue and the base for the England Beach Soccer Association. It operates over a 16 week period through the summer catering for several thousand participants and spectators.

Hang gliding and paragliding is particularly popular on the island with at least one club based here that offers 'learn to' breaks.

Equestrian

The island has 165 miles of bridleways with the ROW service looking to increase that in the near future. There are several horse riding stables that actively promote themselves including two large indoor arenas that stage regular shows and competitions. TSE has identified Equestrian Tourism as an activity that has development potential and has identified four strategic priorities ;-

- ❑ To raise the profile of the South East as a focus for equestrian tourism
- ❑ To maximise the sustainable potential of the additional, high value niche markets offered by equestrian tourism in the South East
- ❑ To create new product and marketing links and packages between good quality equestrian and tourism products and services for the benefit of both sectors
- ❑ To integrate relevant initiatives for, and highlight the mutual benefits of, equestrianism and tourism development.

The British Horse Society has a membership of over 100,000 and there are 40,000 riding clubs in the UK. Horse riders generally have a bias towards the 15-24 and 35-44 age groups with high representation from the AB socio-demographic groups. Those with families are the most likely to take a riding holiday.

TSE has identified some other primary target markets of which the most relevant to the island are:-

- ❑ Groups of friends/young professionals going racing or riding on second holidays and short breaks
- ❑ ABC1 Horse owners in South West, Midlands and East
- ❑ Individuals/couples/groups with or without their horses
- ❑ Groups and individuals seeking to compete and/or learn specialist activities

Some specific objectives of the strategy are to investigate the feasibility of a major indoor equestrian centre, encouraging quality enhancement schemes for operators, establishing various 'hotspots' of equestrian development and to have a regional 'Festival of the Horse'.

There is the potential to develop an international standard indoor arena from at least one of the current stables on the island and although realistically that may never be a Regional Centre it could act as the catalyst for the island to become one of the 'hot spots'.

In addition, there are other opportunities for development of outdoor activities on the island:-

Multi Activity

One of the largest growth areas in recent years has been the multi-activity breaks particularly for celebratory events, incentive and corporate markets. There are two companies on the island that already provide this kind of experience and will combine all of the Key Outdoor Activities as well as other niche types.

Niche

There is provision for specialist types of outdoor activities/sports that appeal to a small market place but, nevertheless, add to the overall perception of the island as a place where anything is possible. These include golf, flying, gliding, shooting, nature safari, speedway, mini-rugby

The provision of generic information on outdoor activities, the potential of the internet and the role of ferry operators in packaging activity holidays is covered under **Destination Marketing**.

Short Term Actions

❑ To support the promotion of the key outdoor activities particularly to the 'learn to ' market place

❑ To support key infrastructure developments needed to assist the key outdoor activities

❑ To support the incorporation of infrastructure in mix use developments in regeneration areas

❑ To ensure that all activity providers are aware of and conform with the relevant licencing and safety regulations

Medium Term Objectives

❑ To establish Centres of Excellence for all Key Outdoor Activities on the island

2020 Vision

To establish the island as a world-class destination for the key outdoor activities

6. Retail

The Economic Impact Study of Tourism in Sandown Bay (2003) estimated that 17% of visitor spend went on retail – if this is applied to the total direct expenditure on the island (£361million) then approximately £60 million pounds accrues to the retail sector each year.

The Drivas Jonas report (2005) estimates that tourist spend approximately £27.5 million on comparison goods and £8.2 million on convenience goods – a much lower total of £35.7 million. However, the report projects that by 2016 this will have risen by 4.8% pa to £59.9 million and £8.9 million respectively.

Drivas Jonas recommends that there is little need to provide more convenience shopping (e.g. food supermarkets), especially out of the town centres, as the current and approved provision should be sufficient to meet the growth. However, there is forecasted to be a large growth in comparison shopping based on expenditure by tourists which will be consistent with the need to " maintain the vitality and viability of the town centres".

If the expansion in the Key Customer Groups occurs and the overall improvements in quality of public realm take place then appropriate changes in the retail sector in the main resorts and towns should follow. The extension of the season and move towards higher spend visitors should assist in addressing perceptions of closed resorts in the off- season and the proliferation of cheap gift shops in some resorts. The suitability of Amusement Arcades and Gaming Centres within the ground floor premises on Primary Shopping Frontages and even Esplanades needs to be addressed if the quality and the ambience of the resorts is to improve.

The concept of cultural quarters in Newport and Shanklin could see specialist shops growing up in arts, crafts, clothing etc.

Potential mix use developments of retail and accommodation could benefit certain regeneration areas such as Sandown where for example large hotels face on to the High St.

Rural communities and rural attractions could develop specialist retail outlets particularly tied to, say, local produce, arts and crafts and countryside pursuits. Farm shops may also enable a degree of convenience shopping in rural areas that may not be allowed under the Drivas Jonas recommendations.

Short Term Actions

❑ Support Drivas Jonas report on encouraging town centre comparison retailing

❑ Encourage mix use developments with retail element in regeneration areas

❑ Applications for amusement centres and arcades should be subject to the strictest scrutiny and, ideally, phased out in primary shopping locations

❑ Support specialist retail in rural and attraction diversification

❑ To support specialist retail that relates to key Outdoor Activities or arts and cultural provision

Medium Term Objectives

❑ To improve the range and quality of comparison goods retail outlets in town centres and cultural quarters

❑ To increase specialist retailers in rural areas and attractions

2020 Vision

To have a thriving and viable retail sector that is open and trading all year round

GREEN TOURISM PLAN

The TDP recognises that with growth comes responsibility. It is vital that tourism does not degrade or destroy the environmental assets that will be the one of the bedrocks of its future viability. Indeed, the growing interest in green tourism from a world-wide perspective is undeniable and presents many opportunities to bring new audiences to the island. The Green Tourism plan runs as a horizontal strand through both the Destination Management and Destination Marketing Actions. Fundamentally, it aims :

To create opportunities for the industry for improved viability and quality whilst addressing the imbalance between tourism development and environmental degradation.

It specifically addresses the following :-

- ❏ Impact of businesses on environment – business support
- ❏ Impact of visitors – AONB, local produce, ROW network
- ❏ Transport – the growth of car free opportunities
- ❏ Marketing Opportunities of green tourism
- ❏ Long term sustainability of Island 2000/Green Island Awards
- ❏ Development of tourism in Rural Areas

The island has already established a number of creditable delivery agents of environmental initiatives some of which are leaders in their field. In particular, the Green Island Awards scheme and the Island 2000 Trust stand out as worthy embellishments to the work of the normal environmental agencies such as the AONB, Wildlife Trust etc.

The thrust of TDP will be to make the island a place of international repute with regard to its 'greeness' .

Specific Objectives

- ❏ To continue with the Green Island accreditation and awards scheme to verify and support businesses environmental performance
- ❏ To support the work of Island 2000 and the further development of the Gift to Nature visitor payback scheme
- ❏ Development of further sustainable tourism initiatives to increase the penetration of Key Customer Groups
- ❏ To establish the island as a flagship sustainable tourism destination

Rural Tourism

It is not the intention within the TDP to make particular distinctions about tourism in 'rural' areas on the island. In relative terms and certainly from the perspective of most tourists, the island is small and although the majority of visitors stay in resort locations many of the experiences they enjoy are in the rural locations. Many of the actions identified in the TDP will impact on the rural economy, in particular:-

❑ The focus on 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

Short Term Actions

To ensure the continued development of the Green Island Awards scheme

❑ To identify a resource within the core establishment costs of IOW Tourism as part of the Quality Development Team
❑ To expand the project to provide high quality business support service
❑ To expand its membership to include more mainstream businesses

To maximise the impact of Island 2000 on developing green tourism products in key areas.

❑ To establish a Service Level Agreement with Island 2000 that identifies clear priority areas consistent with the TDP
❑ To focus the work of Island 2000 in key regeneration project area
❑ To support the development and uptake of the Gift to Nature programme

To improve the visitors understanding and enjoyment of the special environmental qualities of the island.

❑ To support the AONB Management Plan
❑ To improve the profile of the AONB within the generic marketing of the island
❑ To support the RoW Improvement Plan

To develop opportunities for visitors to travel to and on the island without the need for a car

❑ To increase the provision of luggage transfer on the island
❑ To develop and promote cycle transfer, hire and delivery on the island
❑ To encourage the further development of safe off road cycling routes and provision of cycle lanes on existing highways

- ❑ To provide Car Free Travel Planners via the internet or print to prospective visitors
- ❑ To increase and promote through ticketing opportunities on the rail/ferry/public transport network
- ❑ To improve the availability and access to visitor information, including foreign languages, and tickets for public transport on the island.
- ❑ To support the Ryde Interchange project
- ❑ To support the establishment of the Community Rail Partnership
- ❑ To promote links from Southampton Airport to the island by rail/ferry/public transport
- ❑ To promote integrated transport options for major festivals and events on the island – Walking/Cycling/Rock Festival – and very busy holiday periods e.g. August Bank Holiday
- ❑ Develop a specific 'Green Day' special promotion with free travel on public transport
- ❑ To encourage new and existing tourism operators to develop Green Travel Plans for their visitors
- ❑ To raise the awareness of walking and cycling opportunities to the industry through 'Welcoming Walkers and Cyclists' courses and access to relevant promotional material
- ❑ To support the development of 'themed' public transport serving particular Key Customer Groups – Surf Bus, Ramblers Bus

Medium Term Objectives

- ❑ To improve the regeneration and vitality of rural areas
- ❑ To establish a programme of regular conferences on the island with regard to green issues.

2020 Vision

To establish the Isle of Wight as one of the premier Green destinations in Europe

DESTINATION MARKETING

According to a report released in March 2004 by Key Note, word of mouth prompts nearly half of the 141 million holidays taken in the UK, above television advertising and brochures. Respondents were asked to indicate what prompted their last holiday decision:

- ❑ 46% said friends and relatives.
- ❑ 19% said holiday brochures.
- ❑ 4% said television programmes.

Hence, an excellent quality visitor experience will not only bring its rewards directly but will also lay the foundation for future economic sustainability.

This demonstrates the point that **Destination Marketing** depends as much on the **Destination Management** part of the TDP as it does on the inherent proactive promotion and advertising activities.

However, 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 island is fortunate, relative to most other traditional UK destinations, in having several major players, other than the local authority, that focus large expenditures on promoting the destination i.e. the ferry operators. They have also developed as holiday tour operators selling packaged breaks and working with the travel trade. This kind of generic marketing is relatively rare in most other mainland UK destinations.

The relationship and roles of the public and private sector marketing activities, including the provision of response and information services such as Call Centres and Tourist Information Centres, needs to be clearly understood and defined to ensure effective integration and maximised use of resources. This section and the Working Smarter analysis will address this issue.

Domestic Marketing

Marketing to the domestic visitor will need to address three issues:-

- ❑ It is highly competitive, particularly with many coastal locations looking to also extend the season, so level of awareness, distinctiveness of the destination and book-ability will be important.

- ❑ Long stay holidays in the UK are not projected to increase at all in the medium to long term with all the growth being in short breaks and VFR business

- ❑ The TDP framework determines specific Key Customer Groups so the marketing will need to increase its reach and penetration of these groups.

Overseas Markets

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. Overseas tourists have higher per night, as well as per trip, expenditure average. Hence, investment in marketing overseas, particularly in the Northern European – Holland, Germany, France - countries could reap considerable benefit. The island is also popular with visitors from long haul destinations such as the USA, Canada and Australia. The needs of the Key Customer Groups are as applicable in these markets as they are for the domestic tourist and the island already has some products that could be promoted effectively overseas.

Marketing Objectives

- ❑ To raise the general profile of the Isle of Wight in the domestic and overseas market place
- ❑ To reposition the Isle of Wight brand in accordance with the proposed key marketing themes and Inspire Branding Programme
- ❑ To increase reach and penetration to the proposed Key Customer Groups in order to increase yield and reduce seasonality problems
- ❑ To maximise the opportunities available through the development of the internet and information technology generally.

The Isle of Wight needs to ensure that it increases it reach and penetration of the Key Customer Groups. This will be a combination of :-

- ❑ Building a compelling brand,
- ❑ Improving the level and effectiveness of public/private marketing spend in raising and sustaining the island's profile
- ❑ Using technology to improve effectiveness and penetration of message
- ❑ Optimising yield and seasonality

1. Building a Compelling Brand

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. Strong branding also provides consumers with compelling reasons to visit.

The adoption of the new island brand through the Inspire project in Spring 2005 provides the foundation for cross public/private sector promotion of consistent messages about the strengths of the island. This could be worth several million pounds of collective expenditure every year.

The brand has been designed to help raise the profile of the island and promote it as a modern, progressive and attractive place for people to visit, invest and live.

The 'Core Thought' for the brand is "Natural Dynamics". This is explained as:-

"...the force that makes the Isle of Wight a different and special place to live, work and visit. It's a different kind of spirit than you'll find anywhere else because only the Isle of Wight has this particular relationship between the natural environment and its people and their lives....people really can leave work and be on the sea within a few moments or step out of their back doors and instantly be in an area of outstanding natural beauty. It's just much easier to get close to this other world than it is in other parts of the UK or the world."

A number of Resonant Hooks have been identified in the branding research ;-

- ❑ A more balanced lifestyle choice
- ❑ A less manufactured, more earthy outdoor experience
- ❑ A safe enjoyable learning environment
- ❑ A natural well-being retreat
- ❑ A hub for marine related or water oriented technologies

These are all consistent with the motivations identified within the Key Customer Groups in this Plan.

2. Improve level and effectiveness of public/private marketing spend

Experience from other highly successful international destinations show that there is a proactive policy to organise themselves and to enhance public- private sector collaboration. Strategic alliances have also enhanced the ability to develop and promote destinations and products.

Fortunately, the island has a history of the key tourism players working in partnership, primarily through the Image Campaign. However, other tourism marketing activities need to be better integrated with the Image Campaign work and a new Marketing Strategy Group is proposed.

If the island is going to maximise the impact in the day and staying visitors markets both domestically and overseas it will need to establish wider alliances on the island, mainland and abroad.

This could involve more opportunities for joint IOW Tourism and private sector activity in conjunction with :-

- ❑ Co-ordinated PR programmes with ferry ops, Festival organisers, Inspire, English Heritage, National Trust
- ❑ Strategic Festivals
- ❑ Joint promotions with New Forest, Southampton and Portsmouth
- ❑ Greater integration with TSE/Visit Britain campaigns for overseas.
- ❑ Joint promotions with key transport operators – SW Trains, Southampton Airport

The Inspire Branding programme may also bring together other non-tourism related sectors in generating positive and compelling imagery of the island.

3. Use technology to improve effectiveness and penetration of message

According to the Office of National Statistics (September 2004)) by the second quarter of 2004, 52% of households in the UK (or 12.8 million) could access the Internet from home, compared with just 9% (or 2.2 million) in the same quarter of 1999.
5000 new users come online everyday in the UK. There is also a demographic bias towards ABCs and males but there is an increasing number of females and older age groups (silver surfers) using the net. One of the top searches on the internet is for information on travel and holiday destinations and increasing numbers are using online booking facilities.
In the key overseas markets large proportions of the population are now connected to the internet :-

- ❑ USA – (57%) 166 million,
- ❑ Netherlands (61%) 10 million,
- ❑ Germany (55%) – 37 million
- ❑ France (39%) – 18 million

E Marketing

It is no exaggeration to describe e-marketing as a revolution for the marketing industry generally. For the first time, it gives businesses of any size access to the mass market at an affordable price and, unlike TV or print advertising, it allows truly personalised marketing. Specific benefits of e-marketing include:

- ❑ global reach
- ❑ lower cost
- ❑ trackable, measurable results
- ❑ 24-hour marketing
- ❑ shorter lead times
- ❑ a level playing field
- ❑ personalisation
- ❑ one-to-one marketing
- ❑ more interesting campaigns
- ❑ better conversion rate

Englandnet

The Englandnet project was established in 2002 to provide a national and international distribution system for all of England's tourism products and in particular for those from the SME sector. England net is not a booking system in itself but will draw information from regional or sub-regional booking and information systems. This will then appear on www.visitengland.com and www.visitbritain.com . The IW Tourism's Destination Management System (DMS) is the nominated supplier of data – individual businesses will not be able to go direct or via any other commercial provider. The DMS has been created so that it's reservations, bookings and data display is technically interoperable with the Englandnet system.

Information from Englandnet will also be provided to internet portals such as wanadoo.co.uk to guarantee millions more online customers and potential visitors.

The Role of the Destination Management System (DMS)

Isle of Wight Tourism introduced a DMS in 2004 to provide an integrated online system that would feed the website with live data as well being utilised by the Call Centre and TICs. The impending connection, as the sole distributor of Isle of Wight data, to the national Englandnet system only re-inforces the importance of the DMS to the future marketing of the island at home and abroad. The commercial aims and inherent competitiveness in the online enquiry and booking systems of the ferry operators mitigates against the 'data consolidator' and through booking approach of the Englandnet system. However, the ability of commercial operators to package holidays (see Yield and Seasonality), present deals and special offers and to provide another route to market for businesses can only add to increasing the impact in the market place.

Business Engagement

However, support will be required to enable individual operators to fully engage with real-time and other levels of online booking and to keep pace with e marketing generally. This will be covered in the Skills and Training Action Plans.

4. Optimise yield and seasonality

The innovation and flexibility of private operators will be vital in attracting the Key Customer Groups.

Tourism is different from, say, manufacturing in that it has a fixed capacity i.e. a hotel can't make more rooms, and the product is both perishable (once the opportunity to sell is gone it can't be sold again) and subject to peaks and troughs of demand. Hence, 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.

At peak periods the island demonstrates a very high level of occupancy relative to other UK destinations so the opportunity exists to premium price but it must be accompanied by the right quality and authenticity. For example, some visitors will pay extra towards environmental management projects - overseas tour operators often seek accommodation with good environmental policies such as those encompassed in the Green Island Awards Scheme.

The Internet has created an unprecedented opportunity for businesses to sell themselves 24 hours a day in a global market. Also virtual tours of the accommodation and web-cams show potential visitors exactly what is on offer. Special packages for groups - for example, couples, off-season breaks, special events – and special offers generally can be quickly created and posted on the web to help sell vacant accommodation.

The TDP has identified specific packaging opportunities and potential clusters that could attract higher spending customers in the off-season for outdoor activities, arts, festivals, etc.

Moreover, the island is uniquely placed in having two relatively large tour operators that can package and deliver holidays on the island. Sheer logistics, marketing spend and legislative requirements make it difficult for individual businesses to sell packaged products. However, both Wightlink and Red Funnel have the capability and commercial awareness to deliver this service. They also have the added incentive to fill ferry capacity in the off peak periods.
In order to provide for individual customer needs, as when they wish to enquire, and, ultimately, to secure the spend, it is essential that there are effective response and distribution mechanisms. The provision of 24 hour coverage and ability to book through the internet is vital but many visitors, especially in the older age groups, still consider the reassurance of human contact and particularly an 'honest broker' to be just as important. This can be either before the visit or whilst on the island. Hence, the provision of an official Call Centre, Tourist Information Centres and other distribution outlets on and off the island are an important part of the marketing mix. However, there is some duplication of on-island distribution systems for attractions literature and this should be reviewed as to whether a more effective service could be operated

Short Term Actions

❑ **To encourage the island wide adoption of the recommendations of the Inspire Branding Study**

❑ **Improve level and effectiveness of public/private marketing spend through :-**

❑ To improve integration by establishing a Marketing Strategy Group, as a sub group of the IOW Tourist Board
❑ Secure effective leverage of private sector expenditure through the branding project and CCTI membership
❑ Investigating Joint promotions with New Forest, Southampton and Portsmouth where appropriate
❑ Greater integration with TSE/Visit Britain campaigns for overseas.
❑ Joint promotions with key off island transport operators – SW Trains, Southampton Airport, Brittany Ferries
❑ Review literature distribution systems on the island

❑ **Use technology to improve effectiveness and penetration of message through :-**

❑ Supporting the development of the Destination Management System (DMS) in order to maximise the benefits from Englandnet
❑ Investigate the creation of a single database for island operators
❑ To increase the range of outlets for and access to DMS information
❑ Developing an E marketing strategy that targets key customer groups and overseas markets
❑ Up-skilling businesses for greater use of technology and developing on-line booking capability.

❑ **Optimise visitor expenditure and reduce seasonality through :-**

❑ Festival & Special Event led campaigns
❑ Building holiday products to penetrate key customer groups e.g. activity based short breaks.
❑ Greater use of technology to increase immediacy, targeting of campaigns and increasing use of pricing strategies.
❑ Review of on island marketing and leaflet distribution systems

Medium Term Objectives

- ❑ To increase expenditure on generic marketing by 50%
- ❑ To clearly establish the Isle of Wight brand in the domestic and overseas market and have widespread use across the island

2020 Vision

Attracting and retaining visitors that assist in increasing expenditure and match the brand and product values of the island

WORKING SMARTER

The long-term success of the TDP will be dependent on having in place the correct structure that will not only enable and encourage necessary change but also optimise the effectiveness of current delivery in the public and private sector.

At the highest level this will need to incorporate a commitment to tourism as a vital part of the island's future. This should then be supported by policies and services that are aligned and responsive to the planning, development and maintenance of core and tourism related infrastructure.

At ground level, the comprehensive 'buy in' and subsequent actions of key partners will be equally as important. In particular, the role and abilities of the private sector are fundamental to the successful delivery of a world-class visitor experience.

Finally, the TDP will also need to be monitored, evaluated and updated on a regular basis in order to retain its validity.

Who are the key players in the island's tourism future ?

The main delivery agents of tourism are :-

Tourism South East

TSE is SEEDA's preferred delivery agent for tourism in the South East, with a remit for setting strategy on their behalf and advising on tourism policy and priorities. Also provides training, research, marketing and lobbying services.

Isle of Wight Council

Involving primarily :-

❑ Isle of Wight Tourism – Strategic development, marketing, TICs, call centre, Destination Management System, quality development and monitoring, complaints, business support and training, research and monitoring, liaison with Council Services

❑ General Services – beaches, countryside and coastal management, rights of way, highways, leisure and arts facilities, events, street lighting, signposting, roads, car parks, toilets, tourist attractions etc which all effect the visitor experience. Control and monitoring of businesses on the island involves input from Planning, Environmental Health and Licensing, Property Services, and Waste Collection and Disposal.

Private Sector

Businesses in accommodation, attractions, activities, catering, retail and transport. CCTI and other tourism associations.

Isle of Wight Economic Partnership

Regeneration programmes, inward investment, Area Investment Framework, Inspire Branding

Cross Solent Transport Operators

Red Funnel, Wightlink, Hovertravel – marketing, packaged holidays, day trip promotions, event support, product development

Skills and Training

Isle of Wight College, Centre for Vocational Excellence (COVE) for Hospitality and Catering, Learning Partnership, Business Link

National and Regional Perspective

Throughout England the Regional Development Agencies have been taking a greater interest in, and control of, tourism. All, now see tourism as playing a significant part in the economic well being of the regions, warranting public sector support but at the same time seeking the full engagement of the private sector. In some RDA areas e.g. the North West, East Midlands and the South West there have been radical proposals for the rationalisation of the structure of tourism. This has already resulted in the formation of Destination Management Organisations (DMOs) or Partnerships (DMPs).

DMOs are, generally, a formal amalgamation of district level Tourism Departments into one larger sub regional public/private sector company limited by guarantee. DMP's are less formal but with key partners signed up to and accountable for, the delivery of an agreed plan. Both arrangements would be based on a recognisable brand or geographical area e.g. Cumbria or Manchester.

There is no one standard model for a DMO or DMP although South West Tourism (Towards 2015) identifies a DMO as potentially providing the following :-

- ❑ Leading on the development of action plans for the destination area
- ❑ Acting as the primary point of contact for the private sector at sub regional level
- ❑ Providing ICT and e-tourism services
- ❑ Providing information through TICs and other distribution routes to visitors and residents
- ❑ Marketing the destination
- ❑ Carrying out or commissioning research
- ❑ Providing advice and support to businesses
- ❑ Ensuring engagement with local partners and organisations

TSE has chosen, in its strategy Tourism ExSellence, to identify six sub regional partnerships including one for the Isle of Wight. TSE has decided to retain its membership system and continue with regional marketing initiatives (based on specific brands rather than destinations), business support and research.

Currently the Isle of Wight sub regional body has no funding and has been unclear as to what its powers and role should be in delivering the sub regional priorities.

The Role of the Private Sector - The Need for One Voice

The 'island' factor has some advantages, one of which is that there is a strong identification within the Isle of Wight as it being a distinct entity. Many other 'destinations' in the UK suffer from internal fragmentation with a multitude of representative tourism bodies very often driven by resort or sector interests. This has, in the past, enabled a good working relationship between the main players in initiatives such as the Image Campaign and also with support for generic publications for the island.

The island is also relatively fortunate in having only two main trade Associations competing for membership - the CCTI and the VAAA. The CCTI is much the larger of the two and is establishing a branch structure across the island. It also engages with the wider economic sectors.

The VAAA is much smaller, primarily tourist attraction based and provides marketing and distribution opportunities to its members. Another association representing attractions, known as PILAA, doesn't undertake any specific activity for its members but is an associate member of the CCTI. It is proposed that one representative voice for the attractions sector would be a more effective way forward.

The ideal situation would be for private sector interests to be channelled through one body – the CCTI. The advantages of this would be :

- ❑ This would enable a more balanced view both within the tourism industry and the island's economy as a whole
- ❑ It would focus membership resources into one body
- ❑ It would reduce confusion in the private sector
- ❑ It would be more effective for the public sector to deal with one body

The Role of IOW Tourist Board

In effect, Isle of Wight Tourism provides all the services envisaged in other regions as sitting with a DMO albeit within the local authority control. But it needs to formally engage with the other key delivery agents.

In 2004 TSE established a sub regional committee on the island now known as the Isle of Wight Tourist Board. This would appear to be the logical 'umbrella' under which this should happen. The Board's primary focus should be the delivery and evaluation of the TDP.

This would then link with the regional agencies through TSE increasing the potential influence on matters such as project funding and support. It would also represent Tourism on the Local Strategic Partnership and feed into the Island Plan for 2020.

It is proposed that the Board is re -constituted with the following representation:-

- ❑ Chairman – independent
- ❑ TSE
- ❑ IWC – three Councillors
- ❑ IW Tourism
- ❑ IW Economic Partnership – Regeneration/Branding
- ❑ Private Sector – CCTI 6 reps (Serviced 1, S/Cat Acc –1, Holiday/Touring Parks 1, Attractions – 1, Activity – 1, Gen - 1)
- ❑ COVE/ IW College - skills and training issues
- ❑ Transport – Red Funnel and Wightlink
- ❑ AONB Manager – representing all environmental issues
- ❑ IWC Arts Manager – cultural and arts issues

The current Image Campaign Group would be renamed the Marketing Strategy Group and would be a sub group of the Board. IW Tourism would provide the link to the Environment Services Directorate and other initiatives such as Island 2000, the Community Rail Partnership, Events Board etc.

Short Term Actions

- ❑ To establish the IOW Tourist Board as the strategic lead for the Tourism Development Plan and responsible for monitoring and evaluating its progress
- ❑ To reconstitute the Board to ensure that it encompasses representatives that can deliver the key Actions and Objectives of the TDP
- ❑ To ensure that the Board has direct links into the emerging Island Plan/LDF process and the Regeneration Programme
- ❑ To establish an effective proactive and reactive approach to inward investment (See Encouraging and Enabling Appropriate New Development P.68)
- ❑ To support the CCTI in engaging membership from the private sector and delivering the 'one voice' for the industry
- ❑ To implement a co-ordinated Skills and Training programme (see Destination Management Skills and Training P.24)

Medium Term Objectives

❑ To have the IOW Tourist Board clearly established as the lead body in integrating tourism development

❑ To have the CCTI representing the majority of island businesses

2020 Vision

To have the public sector responsive, aligned and committed to its role in infrastructure and development investment and to have the private sector focused, professional and working in partnership at all levels.

Encouraging and Enabling Appropriate New Development

The Working Smarter ethos dictates that the island needs to create an environment in which potential investors have confidence in proposing new development. This requires that, firstly, there is clarity on what kind of development is desired and, secondly, that there is an effective response structure, certainly for any major initiatives. Such an approach will also support a more pro-active strategy for both inward investment and new indigenous growth.

The new Local Development Framework will streamline the local planning process and promote a proactive, positive approach to managing development and delivering change.

The Regeneration Programmes will need to encompass the broader principles and key actions of the TDP. Studies that have been recommended as actions in the Hotel and Holiday Park sectors will help to identify development sites and potential exit strategies in the regeneration areas. Proposals for new attractions will need to be considered carefully and, ideally, incorporated into the regeneration areas.

Short Term Actions

❑ Establishing a Development Team to engage with potential major planning applications at an early stage

❑ Review outcome of Hotel Sector Futures Study and Holiday Parks Audit and Future Market Study and inform LDF process

❑ To ensure that potential new Tourist Attraction developments bring
a net additional benefit to the island

❑ To assess new planning applications or potential approaches for new or indigenous attraction developments within the following criteria :-

❑ Do they fit with the Key Customer Groups ?

❑ Will they facilitate regeneration ?
❑ Are they complementary to existing attractions (or will they displace business) ?
❑ Do they provide wet weather facilities and help extend the season ?
❑ Are they accessible by public transport and/or incorporate a Green Travel Plan ?
❑ Do they help reinforce the distinctiveness of a locality ?

❑ To ensure the principles of the TDP are accounted for in consideration of applications for new development and within the Regeneration Programmes

Medium Term Objectives
❑ To have an established responsive and proactive approach to new development

2020 Vision
To secure the most economically, socially and environmentally beneficial new developments for the island.

Monitoring and Evaluation

In order for the island to Work Smarter it will need to have relevant research and monitoring systems in place. It will also be vital to have clear baseline data against which there can be regular assessments of progress.

The island is fortunate to have one of the most comprehensive tourism monitoring systems in the UK – the Quarterly Monitoring reports which gather information from visitors on the ferry services and from accommodation operators. The passenger figures on all routes are also monitored including the numbers of cars, coaches and commercial traffic as well as foot passengers.

This can be supplemented with research from other sources to provide information on changes in employment levels and skills, quality assurance, visitor perceptions, value of new development etc.

It is proposed that the baseline incorporates 2004 data which is then reviewed annually with a major tri- annual review against forecasts and national benchmarking. Subsequent amendments could be made to the TDP at that time.

New Studies/Data

❑ It is proposed that a Cambridge Model is undertaken on 2004 information in order to give a definitive set of information on value, jobs and multiplier effects.

This will not only resolve current conflicting research but will also enable accurate benchmarking with other UK locations who use the same model including all the areas in the South West. This would then be repeated in each tri-annual review.

❑ A Socio-economic analysis is also required for the baseline year using CAMEO UK classification – this will be obtained from approximately 30,000 ferry survey respondents and DMS enquiries and again be repeated at the end of each three year period.

❑ A specific economic impact study on sailing and yachting covering all the harbours on the island.

Tri Annual Review

The reviews would take place in 2008/2011/2014/ 2018/ 2021 using trend information from the previous three years e.g. the 2008 review would assess 2005 – 2007 data. Data from the Census in 2011 and 2021 could also be used

It is proposed that the reviews evaluate progress in the following key areas:-

❑ Net growth in value – staying and day visitors/domestic and overseas
❑ Growth in volume – staying and day visitors/ domestic and overseas
❑ Seasonality - Changes in occupancy rates
❑ Changes in Socio Economic classifications
❑ Growth in Car, Coach and Foot traffic
❑ Passengers on Island Line
❑ Employment levels
❑ Skill levels - NVQ's
❑ Accommodation Quality - NQAS Participation and mean levels of ratings by sector
❑ Quality of Eating Out – participation in Eating Out Quality Assurance
❑ Value of New Development

Short Term Actions
❑ To commission a Cambridge Model Economic Impact Analysis of the island to assess value, jobs and multiplier effects
❑ To undertake a socio economic analysis of visitors to the island using CAMEO UK
❑ To undertake an economic study of sailing and yachting
❑ To establish definitive baseline figures using 2004 data

Medium Term Objectives
❑ To undertake tri-annual reviews of Key Performance indicators

2020 Vision
To have an established, robust and efficient system of monitoring and evaluating tourism related data