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ISLE OF WIGHT DESTINATION MANAGEMENT PLAN

Version five of DMP for Visit Isle of Wight Ltd. January 2015

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1.0 Introduction

What is a Destination Management Plan?

- **Destination Management** is a process of leading, influencing and coordinating the successful management of all the aspects of a destination that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment.

- A **Destination Management Plan (DMP)** is a shared statement of intent to manage a destination over a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources, in order for the destination to be successful.

In other words, it is a Strategy and Action Plan for Sustainable Tourism in a destination.

So why does the Island need such a plan?

- Supporting the Island's visitor economy is not just about promotion but must cover a whole range of activities aimed at strengthening the quality of the visitor experience and the performance of businesses.

- Our visitors will enjoy a whole set of experiences delivered by many organisations in the public, private and voluntary sectors. It is essential that these sectors work together and in doing so achieve a better use and management of resources.

- A key benefit of having a plan is to identify what the real needs and priorities are for the Island, in order that financial and human resources can be used most effectively. If the plan is well researched, argued and presented, then such a plan can identify projects for support and strengthen the Island's case for funding.

- The number, and type, of visitor coming to the Island has a range of impacts on both people and the environment. These will need to be managed carefully if they are to be sustainable, and in turn will benefit from this careful management also.

2.0 The National Picture

Tourism is one of England's most important industries. It is worth £106bn to England´s economy, taking into account direct and indirect impacts, and supports 2.58 million jobs (*Deloitte 2013*).

Over the past seven years, domestic holiday bed-nights have increased by some 8% and domestic holiday expenditure has increased by around 37% (*VE Tourism fact sheet 2012*). Though the main cause for this has been the deep recession, the UK and the rest of the world has suffered. It is accepted that this renewal of interest by UK residents in taking their holidays in the UK is likely to carry on for some time to come.

The present government recognise how important tourism is to our economy and have set out a strategy, giving clear guidance as to how we should manage our tourism destinations.

> "Our strategy sets out how we will modernise tourism bodies to ensure they reflect the natural geography of a tourist area, allowing businesses and organisations to work together in partnerships to market their area in the most effective way. Most importantly, this strategy will ensure decisions on local tourism policy are driven by those that know their area best and allow the industry to take responsibility for its own future."
> *David Cameron-Government Tourism Policy 2012*

2.1 VISIT ISLE OF WIGHT

With the full support from the IW Council, a number of private and public organisations joined forces in September 2012 and formed the Island's Destination Management Organisation - Visit Isle of Wight Ltd.

This organisation rises to the challenge set out by the Government with the abolishment of Regional Development Agencies and the requirement for new models of cooperation to be established between the public and private sector to develop increased tourism and economic activity.

Visit Isle of Wight Ltd has just one goal – to promote and develop the Island as a leading visitor destination.

The Island's Destination Management Plan should help to guide Visit Isle of Wight, and its partner organisations, in how to achieve this goal over the next five years.

3.0 The Destination Now

Any man from America or Australia might take one glance at the Island as something on a map, and then decide to give it a couple of hours. But you can spend days and days exploring the Isle of Wight, which, if you are really interested, begins magically enlarging itself for you.
J.B.Priestley

The definition of tourism is quite broad and embraces all visitors to the Isle of Wight, whether they are from the mainland or overseas. It includes anyone who is staying overnight, on holiday, for business purposes or visiting friends and relatives. It also includes people visiting the Island on day trips, primarily for leisure purposes as opposed to education and work.

The Island is a distinctive destination that combines rural countryside and diverse coastline with traditional seaside resorts, towns and villages. Its very diversity makes the tourism product difficult to categorise.

3.1 Countryside and Coastal areas

The countryside and rural areas of the Island are largely designated as Areas of Outstanding Natural Beauty (AONB). These areas now support a wide range of accommodation establishments, places of interest and visitor attractions. In addition, walking and cycling are popular with visitors and these are supported, encouraged and promoted through events, such as the IW Walking Festival and a range of cycling festivals. With many farms now diversifying, the rural landscape of the Island can boast of some best practice new businesses, including niche camping & self-catering.

The Isle of Wight is surrounded by some of the most beautiful and dramatic coastline in Europe, from safe sandy beaches in resort areas to the famous coloured sands of Alum Bay and The Needles rocks. Much of the coastline is environmentally protected and unspoilt, supporting a huge range of animal, bird and plant life – many species unique to the Island. The coastal waters are well known to yachtsmen around the world and are the home to the sailing world's most famous regatta – Cowes Week, as well as other events such as The Round the Island Yacht race.

Cowes and Yarmouth are well known for their sailing connections and as cruising bases, whilst there are a wide range of water activities such as windsurfing and surfboarding and even deep sea fishing.

3.2 Main towns and resorts

The Island's capital, Newport, is now being accepted as the main retail centre, with a range of UK retail stores situated in and around the town centre. A multiplex cinema, the Island's hospital and a wide range of independent shops and restaurants all add to the town's vibrancy.

The seaside resorts of Sandown, Shanklin, Ventnor and Ryde all benefit from excellent beaches and there is a concentration of serviced and self-catering visitor accommodation, particularly in the south east coast resorts.

Other towns such as Freshwater and Bembridge are less populated but continue to provide a range of visitor facilities and accommodation.

3.3 Accessibility

The Solent, a short stretch of water that separates the Island from the mainland, gives the Island a unique selling point as a leisure destination. The ferry crossing creates a sense of "getting away", and underlines all that is special about visiting an island. In fact, cross-Solent operators provide three car ferry routes (Portsmouth to Fishbourne, Southampton to Cowes, and Lymington to Yarmouth), two passenger-only high-speed services between Southampton and Cowes, Portsmouth and Ryde, and a passenger hovercraft between Ryde and Southsea (Portsmouth).

The Island is easy to reach via the M3, A3 and M27. Portsmouth and Southampton are the key ports of entry and in addition to accessibility by road, are served by key rail routes. The continental ferry port at Portsmouth serves as a gateway to Europe and through which many overseas visitors pass. Heathrow and Gatwick, along with Bournemouth, Southampton and Eastleigh airports, are within easy reach. With improvements to the A3 (M), the London market is now only 90 minutes away.

3.4 Accommodation and eating out

The Island has around 1,500 accommodation businesses. These businesses provide around 44,000 bed spaces, with a wide range of holiday parks and caravan sites providing half those beds. The Island has a good supply of independent 2 and 3 star hotels. The majority of the Island's serviced accommodation is to be found in and around the resort towns of Sandown, Shanklin and Ventnor. There are also a wide range of self-catering houses and apartments widely spread across the Island.

There is also a select range of boutique and country house hotels, some of which offer Michelin starred restaurants. Yurts, tree-houses and house-boats are more recent additions providing overnight experiences.

As one might expect for a holiday Island, there are a wide range of restaurants, pubs and cafes available, from small tea-rooms and beach cafes to restaurants with diverse culinary offerings.

3.5 Visitor attractions and activities

The Island has perhaps more recognised attractions and activities than any other rural leisure destination in the UK. Undoubtedly a key factor in many visitors returning year after year is the huge range of things to see and do which are not intrusive to the character of the Island and which include theme parks, animal attractions, gardens, a steam railway and museums. Leisure activities on offer include a full range of water-based sports as well as hands-on craft hobbies, tree-climbing, guided ghost walks and cookery courses.

3.6 Heritage

Much of the Island's heritage can be attributed to its close associations with the Royal family, primarily Charles I (Carisbrooke Castle) and Queen Victoria (Osborne House). These Royal connections made the Island one of the most fashionable destinations in the world between 1830 and the 1920s. Many famous Victorian people made the Island their home, including the poet Alfred Lord Tennyson, adding to its reputation. Both the National Trust and English Heritage now preserve, and open to the public, a wide range of historic properties on the Island.

3.7 Palaeontology

The soft cliffs of the Island have easily revealed a wide variety of vertebrate fossils and have made the Island a place of international importance to palaeontologists.

The term 'dinosaur' was first used in 1841 by Sir Richard Owen after he examined a fossil that had been found on the Isle of Wight but the first documented finds on the Island were in 1829. In 2013, the British Museum declared that the Isle of Wight was the dinosaur capital of the UK and today the Island offers a major museum and a range of dinosaur fossil hunting activities.

3.8 Value of Tourism

In 2013 the Island attracted approximately 2.28 million visitors and visitor-spend contributed approximately £286m to the Island's GDP (*2012-13 annual monitor report*). This has grown from £260m in 2012.

The Office for National Statistics recently completed a major study into the value of tourism and, based on 2011 data, they estimate that if one adds the additional investment made by suppliers into other goods and services, then the Island tourism sector contributes as much as £520m (*ONS study 2011*).

There is still much work to do on how to evaluate the contribution of the tourism sector of the Island's total economy.

There are three national surveys which measure tourism expenditure. These estimate Isle of Wight expenditure based on a 3 year average.

The Isle of Wight visitor monitor, carried out by Tourism South East, provides a more up to date expenditure figure but may use a different statistical model to the national surveys. **However, Visitor spending is not the same as Economic Impact.**

The Office for National Statistics works back from the expenditure data to arrive at a view of the value of tourism as a proportion of overall economic value (*GVA TI*).

With Visit England, Tourism South East and the Office of National Statistics, all using different calculation models, it is clear that more work will need to be done to assess a clear ongoing and up to date analysis as to how tourism benefits the benefits the economy.

Tourism is a major part of the Island's economy but we must be aware of the constantly changing market, both in the way people choose to take their holidays but also in the growing, fierce competition in the UK.

4.0 The Changing Market

> **"A popular escape for yachties, cyclists, walkers and the bucket-and-spade brigade since Victorian times, it alternates between chocolate-box quaint and crazy-golf kitsch, rosy-cheeked activity and rural respite. But the last few years have also seen a fresh youthful buzz injecting life into its southern resort towns, attracting a new generation of urbanites and romantic weekenders with gastro pubs, slick hotels and big music festivals. Still, the island's principal appeal is its surprisingly mild climate, its myriad outdoorsy activities and its lush green hills that roll gently down to 25 miles of clean, unspoilt beaches."** ***Lonely Planet website 2012***

Tourism has been a part of Island life for more than 200 years, since the late 1700s. Resorts began to be developed in the 18th and 19th centuries and, in the main, flourished well into the 20th century. They were able to capitalise on changes in society, such as the growing amount of leisure time, increasing discretionary income and greater mobility, provided first by the railways, and then the car.

In the 1970's however, the situation began to change. Package holidays to overseas destinations with a more reliable climate, followed by cheaper air travel and a growth in the number of domestic destinations, meant that resorts faced increasing competition both at home and abroad. In 1981, the Island attracted approximately 2.6m visitors.
Over the last 25 years, there has been a gradual decline in the total number of visitor and a dramatic change in the demographics, length of stay and time of year visitors choose to come.

	1981	2013
Visitors staying 5 + nights	65%	29%
Visitors staying 4 nights or less	35%	71%
Expenditure per staying visitor	£128	£171
Expenditure per day visitor	£13	£30
% of adult only groups	60%	80%
Visitors using self-catering accommodation	19%	21%
Visitors using serviced accommodation	36%	36%
Visitors using caravans or camping	17%	11%
% of visitors coming by car	58%	61%
% of visitors on a main holiday	70%	32%
% of visitors October to March	8%	28%

Info from IW Tourist Board report 1981 & 2013 VIOW tourism Monitor (£1 in 1981 is worth £3.60 in 2013 – Salfara.com)

So, as we can see from the above table, though the Isle of Wight has always been a holiday island, there have been dramatic changes in how visitors choose to take their holidays over the past 30 years.

5.0 Domestic Competition

Tourist competition is fierce amid a growing and constantly changing tourism market. Based on feedback from our visitors, our main competitor destinations in the UK are Dorset, Devon and Cornwall. (TSE report 2010)

However, desk-top research suggests that our competitors should include any short break coastal destination within a two hour drive time of the south of England.

DESTINATION	STAYING VISITORS	AVERAGE LENGTH OF STAY	AVERAGE SPEND PER VISIT	AVERAGE SPEND PER NIGHT
North Cornwall Value of Tourism 2011 SWRC	1.07m	5 nights	£281	£56
Bournemouth Value of tourism 2012 SWRC	1.2m	3.8 nights	£235	£62
South Devon (Torbay) Value of Tourism 2011 SWRC	1.07m	4.7 nights	£217	£46
North Devon Value of tourism 2011 SWRC	1.02m	4.7 nights	£201	£43
South Downs Sussex TSE report 2011	.59m	3.4 nights	£167	£49
Dorset Value of tourism 2012 SWRC	3.5m	4.2 nights	£167	£40
Isle of Wight TSE visitor monitor 2012	1.36m	4.1 nights	£163	£40
Kent TSE Economic impact study 2011	4.9m	3.5 nights	£159	£45
Isle of Wight 2013 *TSE monitor 2013*	***1.39m***	***4.1 nights***	***£171***	***£42***

These figures do not include travel costs

It is important to note that the above analysis is subject to varying annual calculations and must not be seen as definitive. However, we believe the results are a fair picture of our domestic overnight competition.

The Island competes with a range of similar destinations. They all offer a similar mix of diverse countryside, attractive seaside, beautiful coastlines & rich heritage. Therefore it is all the more important that the island looks carefully at its product mix and quality.

Please see Appendix A for details of domestic visitor trends, Island visitor perceptions and a SWOT analysis which have helped to steer the following vision and objectives.

6.0 WHERE WE WANT TO BE

6.1 VISION

To further develop a viable and sustainable visitor economy, which makes an important contribution to the economic vitality of the Isle of Wight, improves its image and reputation, balancing conservation with enhancement, and adds to the quality of life for its residents.

The Destination Management Plan should be governed by the following principles:-

- **FOCUS ON VALUE OF TOURISM AS WELL AS VOLUME**
- **POSITION THE ISLAND OFFER AS SOMETHING DIFFERENT**
- **ENCOURAGE AND FACILITATE PRODUCT INVESTMENT**
- **EMBRACE AND ENHANCE OUR NATURAL LANDSCAPE**

Everyone has a part to play in making sure that the following four objectives can be delivered.

Four key objectives will help us achieve our vision:

KEY OBJECTIVE 1: **INCREASE THE VALUE OF TOURISM TO THE ISLAND ECONOMY**

KEY OBJECTIVE 2: **ENCOURAGE INNOVATION AND INDUSTRY INVESTMENT**

KEY OBJECTIVE 3: **DEVELOP A YEAR ROUND TOURISM ECONOMY**

KEY OBJECTIVE 4: **SUSTAIN AND ENHANCE THE ISLAND'S LANDSCAPE**

Lead partners for this Destination Management Plan are Isle of Wight Council, Visit Isle of Wight Ltd, and the Isle of Wight Chamber of Commerce, Tourism and Industry.

Other partners include further education providers, the AONB partnership, Town and Parish Councils and Heritage organisations.

However, key to the successful completion of this plan will be the support and energy from all involved in the tourism industry, from front-line staff who provide that all important welcome, to the owners and managers of tourism businesses Island-wide.

Using this plan, we can all work together and by doing so; enjoy together the many benefits that will come from a successful tourism economy.

KEY OBJECTIVE 1: INCREASE THE VALUE OF TOURISM TO THE ISLAND ECONOMY

A) By increasing the numbers of visitors, with a particular emphasis on those staying overnight

Tourism is a vital source of employment and income for the Isle of Wight. The Island is a well-recognised tourist destination with a number of key assets. However, this report has highlighted the dramatic changes to the pattern of holiday visits to the Island over the past 30 years. Research also shows that trends over the next few years will continue to see a growth in short break holidays of four nights or less and a continued decline in longer stay domestic holidays. It must also be noted that the declining, longer stay visitor is more likely to be a low spender from the C1/C2 demographic. It will therefore be important to develop an effective marketing strategy which focuses on the more valuable short break market as well as day trips, without losing sight of that declining but still worthwhile longer stay holiday market. It is important that the Island continues to develop USPs which will help us to compete with our main domestic competitors, so not only attracting repeat custom but also appealing to new visitors.

B) By increasing the spend per visitor

The average revenue earned by each visit to the Island is relatively low at present in comparison with our domestic competitors. Indeed, some of these competing destinations are ahead of us in re-positioning their product perception. It is therefore important that all partners look closely at the emerging aspirations of those visitors from the ABC1 demographic and re-position their products and offers accordingly.

The Isle of Wight has many accommodation and attraction businesses that function extremely well and provide excellent service, and consequent satisfaction, to our existing visitors. However, if we are to attract more spend per visitor, they and many other tourism businesses will need to review their existing services in order to raise their value and meet the growing visitor expectations. This will be challenging to some. With most owners being life-style businesses, change will be difficult, both financially and emotionally. Business and planning advice will need to be accessible and affordable. *This objective can only be completely successful if Objective 2 can be achieved.*

With the formation of a 'tourism skills and training' panel, there should be a renewed attempt to encourage staff, managers and owners to upskill themselves in all areas of the business. Indeed, this panel could also co-ordinate opportunities for the unemployed to receive pre-season training in order for them to be best placed to take tourism jobs. A commitment could even be sort from larger employers to agree to take a small number of 'job seekers' as part of their recruitment process.

Key to this and other objectives will be to make sure the DMO has a sustainable funding stream.
The Council, the Chamber and Visit Isle of Wight Ltd. must work together to investigate all funding opportunities and work up a business plan which secures long-term income to support all aspects of a DMO's role for the Island.

ACTIONS FOR OBJECTIVE 1	LEAD/PARTNERS	TIMESCALE	MEASURED BY
Deliver a measurable annual marketing strategy that also recognises higher value consumers (see appendix C)	**VIOW**	5 year marketing strategy reviewed every December	ROI ON PR VISITOR RESEARCH & WEBSITE STATS
Develop campaigns to encourage short stay 'event' visitors & their families to stay longer or return	**VIOW**	5 year marketing strategy reviewed every December	ROI ON PR/ VISITOR RESEARCH & WEBSITE STATS
Encourage employers to up-skill their staff in all areas of the business operation and introduce the concept of a tourism academy in partnership with existing training providers.	**CCTI** & TRAINING PROVIDERS	Start in Autumn 2015 and review in summer 2016	No. OF STAFF BENG ENROLLED IN TOURISM SKILLS TRAINING
Develop a benchmarking scheme for 'best practise' to help all tourism businesses improve quality and Accessibility.	**CCTI**/VIOW/VE	Scheme to be in place for 2016	No. OF BUSINESSES ENROLLED IN SCHEME
Develop a local awards scheme to recognise 'excellence' in tourism operators, to feed into the National England for Excellence scheme.	**VIOW**/TSE/CCTI	First awards to be made in August 2016	No. OF ENTRIES & QUALITY OF WINNERS/ REGIONAL COMPETITION
Encourage cross-Solent & other transport operators to further develop value offers	**VIOW**/FERRIES/**CCTI**	Ongoing –reviewed in December 2015	No. OF 'OFFERS' AVAILABLE TO PROMOTE
Improve our research and analysis in order To gain a better understanding of the different Markets – and seek partners to Assist with any research programmes	**VIOW**/FERRIES/IWC	Ongoing – review research in October 2015	AVAILABILITY OF INFO TO BOARD PARTNERS & improvements to future marketing campaigns
Research & evaluate opportunities to provide long Term sustainability for DMO. Feasibility study into a D-BID to be carried out.	**VIOW**/BOARD PARTNERS	Subject to study, Complete D-BID by May 2016	New income stream in place
To consider and support the further appeal of local harbours to increase economic return from Leisure use.	**VIOW**/HARBOUR COMMISSIONERS/IWC	Within marketing strategy & reviewed every December	Economic activity growth reported by HC & activity organisers

KEY OBJECTIVE 2: ENCOURAGE INNOVATION AND INDUSTRY INVESTMENT

If the Island is to meet its aspiration of growing business, enriching its products and lengthening the season, large investments from both existing and new companies will be required. For this to happen, consideration needs to be made to offering incentives for individuals and companies to invest in the Island product, along with a sympathetic approach from the local authority when planning matters are being considered.

It is obvious that recent tourism trends will need to be reflected across the Island's product range; whether that is serviced accommodation, self-catering units, caravan and chalet parks, camping and caravanning, as well as attraction and leisure activity offers.

However, we do need to know more about the Island's existing tourism product, particularly about its accommodation. The last bed-space audit on the Island was nearly 10 years ago. The DMP will require an up to date audit of all accommodation currently available before it can make detailed recommendations based on future accommodation trends.

In 'resort' towns, there may have to be a short term loss of bed-space and changes in aspirations, in order to encourage future accommodation investment. As seaside visitor demographics change, so there must be changes to geographical centres of tourism activity. As demand grows for more 'experience' led leisure activities, so we must be willing to welcome new attraction businesses whilst helping some existing operators to change direction.
Area Action Plans will need to include a vision for the future of the traditional resort areas and this vision will need to compatible with the image that the Island wishes to present as a visitor destination, even if resorts become less accommodation focused, and more residential.

In order for these changes to happen, the Island people and their representatives must develop a 'can-do' attitude and understand the evolving trends.

Tourism planning policies in The Island Plan already recognise this need (SP4) but the planning process must become a facilitator, in order to encourage the changes needed to improve the quality of our products.

ACTIONS FOR OBJECTIVE 2	LEAD /PARTNERS	TIMESCALE	MEASURED BY
Carry out an audit/analysis of bed-space across all accommodation sectors	**VIOW**	2015 summer with report delivered by November 2015	REPORT DELIVERED
Develop an 'open for business' approach by promoting tourism development & locations	**IWC**/CCTI/VIOW & PRIVATE ENABLERS	Review in October 2015	LEVEL OF INVESTMENT INTEREST RECEIVED REGULAR MEETINGS OF PARTNERS. FEEDBACK FROM DEVELOPERS
Establish a professional programme to facilitate off-Island & local investment interest and grant bidding	**IWC**/CCTI/VIOW/N-ENT	Review in October 2015	PRO-ACTIVE PARTNERSHIP PANEL REPORT & LEVEL OF INVESTMENT INTEREST RECEIVED
Identify resource to fund a pro-active approach in attracting new investment to the Island	**IWC**/CCTI & partners	Review in October 2015	NO. EXPRESSIONS OF INTERST BY INVESTORS
Encourage a supportive attitude amongst Island residents, and entrepreneurs, through improved on-Island communication	VIOW/CCTI/IWC/TC/PC WITH LOCAL MEDIA	Review in October 2015	A MORE POSITIVE ATTITUDE TO TOURISM DEVELOPMENT FROM THE PUBLIC and reflected through elected representatives (Survey Monkey etc.).
Encourage and develop front-line staff and Island residents into 'ambassadors' and develop more Pride in the place where they work and live	**VIOW**/CCTI/training providers	Review in December 2016	Measured by social media and visitor research

KEY OBJECTIVE 3: DEVELOP A YEAR ROUND TOURISM ECONOMY

Key to a future more vibrant tourism economy is a growth in full-time all year round employment and therefore developing the opportunity for tourism businesses to operate a longer season is a real priority.

The Island's traditional trading profile is one of peaks and troughs, set against a season lasting from Easter to the autumn half-term. The young family market re-enforces such a profile, basing its holiday patterns around school holidays. More recently, the Island has seen a growth in adult-only groups taking short break holidays across a wider period of the year. The present marketing strategy of VIOW has recognised this and is developing early and later season marketing initiatives to encourage further growth.

The Island's tourism industry is still predominantly a seasonal employer and though there are some medium-sized and large companies who do offer all year round employment, this is the exception rather than the norm. However, with the need for the hospitality sector to grow its skills base, there are opportunities for apprenticeship schemes and other low season training, as well as a steady increase in winter 'tourism' activity.

Work has started in developing a series of 'festival weeks' which celebrate niche activities across the year. This should continue and consider the winter period in particular.

Operators of activities, attractions and hospitality businesses will need to play their part in this process and develop longer opening patterns, spreading their risk by working together to provide a feasible year round offer. **For year round economic sustainability, it will be important to build on both the marketing and the products to smooth out the seasonal profile.**

Though the Island has, and continues to develop, an award winning website and digital presence, there continues to be a need for a year round telephone enquiry service, to back up the Island's online information. At present, the Council's contact centre handles tourism enquiries as part of its general public service remit. Perhaps this should be provided by VIOW or Tourist Information Points.

Key to this and other objectives will be to make sure the DMO has a sustainable funding stream.

The Council, the Chamber and Visit Isle of Wight Ltd. must work together to investigate all funding opportunities and work up a business plan which secures long-term income to support all aspects of a DMO's role for the Island.

ACTIONS FOR OBJECTIVE 3	LEAD/PARTNERS	TIMESCALE	MEASURED BY
Research, evaluate options and implement new funding opportunities to provide long term Sustainability for DMO. Feasibility study into a D-BID to be carried out.	**VIOW**/BOARD PARTNERS	Subject to study, Complete D-BID by May 2016	New income streams in place
Produce a focused late autumn and early spring marketing campaign as part of the annual strategy (See appendix C)	**VIOW**	5 year marketing strategy reviewed every December	VISITOR RESEARCH WEBSITE STATS ROI ON PR
Introduce 'festival' weeks, niche events and sporting activities to encourage short breaks during low season	**VIOW**/THIRD PARTY OPERATORS	3 YEAR GROWTH PLAN – REVIEW RESULTS IN 2017	No. OF NEW ACTIVITY/EVENTS ROI ON PR FROM ACTIVITY EST. ADDITIONAL TOURISM VALUE/FOOTFALL
Prioritise existing and new product development with all year round, all weather potential with good Accessibility.	**IWC**/VIOW	REVIEW ACTION IN 2017	RANGE OF 'YEAR ROUND' PRODUCT GROWTH REVIEW
Develop the 'academy' concept for tourism training during low season and attract off-Island students to take residential courses – new business for Island Accommodation businesses	**CCTI**/TRAINING PROVIDERS	Start in Autumn 2015 and review in summer 2016	No. OF STAFF BENG ENROLLED IN TOURISM SKILLS TRAINING
VIOW to work with existing attraction, activity, hospitality & transport providers to extend late autumn and early spring opening.	**VIOW**/TOURISM BUSINESS /TRANSPORT OPERATORS	5 year marketing strategy reviewed every December	SUCCESS OF INDIVIDUAL BUSINESS AND QUARTERLY MONITOR MEASUREMENTS OF INCREASED TRADE
VIOW to work with partners to encourage new initiatives for corporate activities, weddings, family celebrations & other niche activities	**VIOW**/ tourism business/IWC	5 year marketing strategy reviewed every December	AMOUNT OF ADDITIONAL SALES ACTIVITY IN THESE SECTORS
To consider options of how to provide ongoing telephone enquiries for tourism services	**VIOW**/CCTI/IWC	TO AGREE PROVISION BY APRIL 2015	SERVICE IN PLACE AND AUDITED AS EFFICIENT

KEY OBJECTIVE 4: SUSTAIN AND ENHANCE THE ISLAND'S LANDSCAPE

It is important that existing and new tourism products are sustainable, both economically and environmentally. It is also just as important that our marketing reflects the full range of natural landscape the Island offers.

This 'place-making' should utilise the unique characteristics of the historic and natural environment, without compromising their integrity. This is of particular importance for the Island's AONB which needs a vibrant rural economy. Tourism accommodation and activities should be encouraged as development opportunities within the AONB, particularly as more traditional rural industry such as farms need to diversify.

This approach should also be considered with regard to Island woodland. One of the key Forestry Commission objectives is to promote recreational facilities within their Island forests and the DMP **should facilitate this aspiration.**

Over the past few years, the number of leisure visitors using cars has increased and the impact could be detrimental to the ongoing quality of the Island holiday experience.

Ongoing investment and promotion of both public and 'active' (cycling & walking) transport would help to reduce this impact and appropriate road management could discourage the use of the car for unsuitable journeys. This could further enhance the Island as a premium destination for walking and cycling activities.

The Island is recognised as the best site for dinosaur remains and work is already ongoing in making sure that the Island's geo-diversity is promoted and tourism products reflect this USP.

It will also be important that a determined effort is made to clean and/or tidy up corners of our urban and rural landscape where either planning challenges have delayed development works, or where past poor maintenance has led to an unsightly public realm.

With the benefit of a steering group made up of all the Island's environmental agencies, providing a joint and pro-active approach, an important step can be taken in making the Island a better place to live and to visit.

ACTIONS FOR OBJECTIVE 4	LEAD/PARTNERS	TIMESCALE	MEASURED BY
Encourage and facilitate certain rural diversifications for tourism use	**IWC**/VIOW/AONB/N-ENT	3 YEAR PLAN –REVIEW IN 2017	No. OF SUCCESSFUL RURAL CHANGES OF USES TO TOURISM PRODUCT
Create a visitor offer-led panel to work with key environmental bodies in supporting sustainable tourism activities and product development	**AONB/**VIOW/N-ENT/DEFRA	SIMILAR TO AONB MANAGEMENT PLAN – REVIEW IN 2017	AONB MANAGEMENT PLAN DELIVERY & NO. OF ADDITIONAL RURAL SELF-SUPPORTING TOURISM ACTIVITIES
Reflect the Island's natural landscape within the annual marketing campaigns	**VIOW** WITH EXPERTISE FROM AONB PARTNERSHIP	5 Year marketing strategy reviewed every December	VISITOR RESEARCH/ ROI ON PR. ADDITIONAL FOOTFALL
Develop a partnership-led process which can lead to improving unsightly private and public spaces & encourage 'friendly' urban areas **Consider how to maintain the quality of public spaces and landscape**	**IWC**/VIOW/CCTI/TOWN & PARISH COUNCILS/ ISLAND ROADS	REVIEW IN 2017	X No. OF SITES/AREAS TIDIED UP AND No. OF ORGANISATIONS INVOLVED
Recognise the Island's diverse heritage in marketing and product development	VIOW/THIRD PARTY PROVIDERS	5 year marketing strategy reviewed every December	ROI ON PR / COMMERCIALS SUCCESS OF PROVIDERS/ X No. OF NEW PRODUCT
Develop partnerships to increase the quality and usage of public transport and walking/cycling infrastructure under "Drive Less See More" banner	**IWC**/CCTI/VIOW/ Public health Authority	Review in December 2016	No. OF INITIATIVES & CHANGES IN TRANSPORT USE FROM VISITOR RESEARCH
Through initiatives such as 'Taste the Wight' encourage providers to focus on sustainability of operation, including local food/transport/environment etc.	**CCTI/** AONB/VIOW/IWC	Ongoing – review in December 2016	No. of initiatives and feedback from local suppliers & environment bodies
Encourage every opportunity to maintain and protect Iconic coastline & infrastructure	**IWC**/TOWN & PARISH COUNCILS/	Reviewed in December 2015	No. of successful projects completed

APPENDIX A

VISITOR PERCEPTIONS / ISLAND SWOT ANALYSIS / DOMESTIC TOURISM TRENDS

VISITOR PERCEPTIONS OF THE ISLAND

TSE visitor survey report 2011 ***carried out during August***

52% of visitors were ABC1 demographic.
64% of visitors were C1/C2 demographic.

56% had chosen the Island as a holiday for rest and relaxation, which included walking, eating out and leisure shopping.

24% had chosen the Island as a seaside holiday, which included going to the beach and visiting attractions.

Only 12% had considered an alternative destination to the Island. Cornwall, Dorset and The New Forest were the named alternative destinations.

The key influences given by visitors as to why they had chosen the Island were:

- Unspoilt countryside 63%
- Peace and quiet 60%
- Beaches and activity 50%
- Plenty to see and do 49%

Only 10% had been influenced by special events.
Only 8% were influenced by special offers.

76% of all those questioned had been to the Island before.
<u>The opinion of visitors was sought on a range of topics.</u>
97% of visitors felt that the feeling of welcome was good.
90% of visitors felt the Island was generally a clean and tidy destination.
95% of visitors felt the quality of the Island's countryside was good.
84% of visitors felt that the quality of visitor attractions was good.
87% of visitors felt that it was easy to find their way around the Island.
87% of visitors felt their visit had met their expectations.
Only 39% of visitors rated the Island nightlife as good.

ISLE OF WIGHT SWOT ANALYSIS

STRENGTHS

- BEING AN ISLAND
- SCENIC LANDSCAPE, SEASCAPE AND NATURAL ENVIRONMENT
- CLEAN, SAFE FAMILY BEACHES
- GOOD RAIL AND ROAD CONNECTIONS TO ISLAND
- WIDE VARIETY OF VISITOR ATTRACTIONS
- WIDE RANGING SPECIAL EVENTS PROGRAMME
- DIVERSE HERITAGE OFFERS INCLUDING HISTORICAL SITES
- CHARMING TOWNS AND VILLAGES
- RELAXED PACE OF LIFE
- IDENTIFIABLE BRANDS (OSBORNE HOUSE, NEEDLES, IW FESTIVAL ETC)
- WIDE SELECTION OF PUBS, RESTAURANTS AND CAFES
- RURAL LOCATION WITH MANY OUTDOOR SPACES
- “BEST IN BRITAIN” SUNSHINE HOURS RECORD
- HIGH PROFILE MUSIC FESTIVALS
- CENTRE FOR ACTIVITIES (SAILING,CYCLING, WALKING ETC)
- THE DMO PARTNERSHIP

WEAKNESSES

- UNDER INVESTMENT IN PUBLIC REALM INFRASTRUCTURE
- SOME RESORTS IN NEED OF REGENERATION & INVESTMENT
- PLANNING CONSTRAINTS
- PERCEPTION OF HIGH COST OF CROSS SOLENT TRAVEL
- COST AND AVAILABILITY OF PARKING IN RESORTS
- DIFFICULT TO DEFINE CORE PRODUCT
- PUBLIC TRANSPORT POOR IN SOME AREAS
- LARGELY SEASONAL TOURISM
- A LACK OF INWARD INVESTMENT
- SLOW RECOGNITION OF THE CHANGING VISITOR MARKET TRENDS
- PERCEIVED POOR STANDARDS OF CUSTOMER CARE
- LACK OF 4/5 STAR QUALITY ACCOMMODATION
- TOO DEPENDENT ON CAR VISITORS
- NO DMP
- TOO MANY EMPTY SHOPS IN THE SMALLER VILLAGES
- INCONSISTANT MOBILE PHONE COVERAGE

OPPORTUNITIES

- FORMING PARTNERSHIPS WITH KEY STAKEHOLDERS
- ENCOURAGING GREATER PRIVATE SECTOR INVESTMENT
- GROWING THE KEY SHORT BREAK MARKET SUSTAINABLY
- MEETING THE NEEDS OF A GROWING AND AGEING AFFLUENT POPULATION
- CREATING A CORPORATE & INCENTIVE BREAKS MARKET
- IMPROVING THE QUALITY OF THE CORE PRODUCT
- PROMOTING STRONGLY THE“HOLIDAY ‘ABROAD’ MESSAGE”
- ADDRESSING THE OVERSEAS MARKET POTENTIAL
- CREATING “DARK SKIES” TOURISM PRODUCTS

THREATS

- A NATIONAL ECONOMIC DOWNTURN
- THE RESURGENCE OF LOW COST OVERSEAS HOLIDAYS
- DOMESTIC COMPETITION
- THE LOSS OF TOURISM BEDSPACE
- FAILURE OF THE ISLAND TO MEET VISITOR EXPECTATIONS
- FAILURE OF DMO PARTNERSHIP MARKETING
- THE DEPENDENCE ON CROSS SOLENT OPERATOR BUSINESSES
- UNDER INVESTMENT IN THE TOURISM PRODUCT
- NOT EMBRACING NEW TRENDS, VISITOR MARKETS OR ASSOCIATED CHANGING MARKET TASTES
- RESIDENTS’ LOW OPINION OF TOURISM
- CLIMATE CHANGE EFFECTING LANDSCAPE
- LOCAL AUTHORITY BUDGET CUTS

DOMESTIC TOURISM TRENDS 2014 – 2023

Visit England report/Travel supermarket trends tracker 2013/UK Hotels forecast 2014 PWC

To be able to make the right decisions for the future, we need to need to look forward, to ensure that we are ready to meet the opportunities and challenges that lie ahead.

The World Travel and Tourism Council (WTTC) forecast for annual global growth in tourism has been estimated at an average 4% per annum over the next ten years in real terms.

The growth rate of the UK visitor economy is forecast to be 3.8% per annum over the period 2013 to 2025 1, well ahead of the 2.9% forecast for the UK economy as a whole, with spending by inbound visitors forecast to grow at a faster rate than spending by domestic residents (4.4% versus 2.6%).
(*Nov 2013 Deloitte report*)

POPULATION AND SOCIAL CHANGE

Overall, the population of England will grow, but this growth will not be spread evenly across age groups. One very well understood trend is the growth in the number of older people and rise in the average age of the country – referred to as the ageing society. The medium term future will also see a rise in the number of younger people, as a result of a sustained rise in fertility rates since the mid-1990s – a baby boom. Not every section of society is growing; there will actually be a decline in the number of people aged 35-49 over the next few years, leading to a 'squeezed middle' generation.

Older people	Young families	Squeezed middle
50 +	>34	35-49
• More leisure time • More affluent • More active • Younger taste	• Short to medium time rise • Fewer siblings • Extension of inter-generations • Shift in social values • More ethnic diversity	• Reduction in people aged between 35-49 • Vulnerable to job loss • Increased living costs

ECONOMIC CHANGE IMPLICATIONS

- The length and depth of the downturn ensures that the impact of it on consumer behaviour will last long into recovery. However, there is no single recessionary experience: individuals' experiences – and the habits they've formed – vary widely.
- Desire for value evident at all sections of the market – including the luxury end.
- Holidays are not immune to cost cutting – but people do prioritise their leisure time and are extremely reluctant to cut back.
- The appetite for domestic leisure experiences is increasing – partly driven by the self-preservation society trend – and the appetite for staycations is likely to be maintained during recovery.
- Consumer confidence will be a key barometer of when pre-recession holiday trends might return.

CONSUMER TRENDS

- Play society – despite cutting back in other areas, leisure expenditure will continue to be seen as a priority.
- Demands for control – more freedom of choice & control by the consumer.
- Information access – mobile devices increasing immediate communication.
- Demand for simplicity – with access to so much information a desire for simple facts.
- Work-life balance – continuing perception of time pressure.
- Individualocrasy (!) – increased desire for bespoke activities.
- Cultural capital – 'big spenders' frowned upon – desire to learn new skills.
- Ethical priorities – broader than just being 'green'.

TOURISM TRENDS

- Continued increase of short breaks due to time poverty.
- Last minute decisions are here to stay.
- VFR trips will be maximised with additional leisure activities.
- Inter-generational family trips will become increasingly important.
- Nostalgia tourism will continue to play a role.
- Active tourism will grow as all ages seek more adventurous experiences.

INDUSTRY FORECASTS

- Inbound tourism to the UK expected to see steady growth.
- Business travel may pick up faster than leisure.
- Continued growth of new hotel rooms in the budget sector.
- Increasing pressure on established Independent hotels pricing.
- Continuing decrease on dependency on travel agents.
- Increase in 'personal catering' apartments and hotels.
- Continued popularity of packaged products.

ENGLAND'S SEASIDE: WHAT ARE THE OPPORTUNITIES?

VISIT ENGLAND REPORT –MARCH 2014 (baseline 2012)

This report takes a look at ten English seaside destinations. The Isle of Wight is the third most visited destination on that list, beaten only by the resorts of Blackpool and Scarborough.

Emerging trends

- Seaside trips are more likely to continue to be taken by lower social grades.
- There will be a steady decline of lower social grades taking seaside trips.
- Overnight seaside trips will continue to remain longer than the overall holiday market.

Public Perceptions

- The seaside is seen as a low cost destination and the public expect deals and discounts.
- Traditional Resort towns are seen as tacky, dated and dirty (e.g. Skegness & Blackpool.
- The English coastline is considered scenic and appealing as 'get away' breaks.
- Coastal towns are seen as quaint and distinctive with more to do (e.g. Salcombe & Filey).

APPENDIX B

KEY POLICIES & REPORTS

The DMP needs to take full account of recent policies from a range of Island organisations, ranging from statutory bodies to environmental advisory groups.

The following key objectives have taken into account policies and reports from a range of Island organisations, from statutory bodies to environmental advisory groups.

Key policies and priorities from these plans include:-

- ISLE OF WIGHT COUNCIL CORPORATE PLAN 2014-2017
- IW AONB PARTNERSHIP MANAGEMENT PLAN 2014
- ISLE OF WIGHT COUNCIL ECONOMIC DEVELOPMENT PLAN 2011-2013
- WIGHT FOOD – 2013 report into Island food by Natural Enterprise
- IWCCTI TOURISM DEVELOPMENT PLAN – 2012 Draft paper
- ISLE OF WIGHT TOURISM STRATEGY: a 2011 discussion paper by Consulting Inplace
- EARLY THOUGHTS FOR TOURISM DEVELOPMENT – 2010 PAPER BY WM Enterprise
- IW LOCAL GEODIVERSITY ACTION PLAN – 2010 plan by English Nature
- SIGNIFICANCE OF SAILING – 2009 PUSH report by Tourism South East
- CLIMATE IMPACTS REPORT – 2009 report by Footprint Trust/Island 2000 Trust
- ECO-ISLAND STRATEGY – 2008 report by Island Strategic Partnership
- IW FOREST DESIGN PLAN 2007-2037 report by Forestry Commission

ISLE OF WIGHT CORPORATE PLAN 2014-2017

"The Economy and in particular, tourism continue to be issues which because of their importance to Island people, make them a priority for the council. Increased employment and a vibrant business sector are key factors in generating the income and wealth of Island citizens which ultimately affects their quality of life and welfare. The council will continue to work with partners to encourage and develop the Island's economy, including attracting inward investment."

PRIORITY 4 of the plan

Growing the Economy and Tourism

Two of the outcomes for this priority are:-

- Developing and promoting the Island's tourism offer to better meet the needs of core and potential visitor markets and grow the visitor economy.

- Providing a planning and regulatory framework which provides confidence to investors and properly balances the competing needs to promote economic growth and protect the Island's natural and historic environment.

Criteria to judge the success of the above strategies includes:

- Measuring the increase of the value of tourism to the Island.

- Agreeing a shared goal between IW Council and Visit Isle of Wight by means of a DMP.

- Identifying appropriate development land and encouraging investment enquiries.

IW COUNCIL ECONOMIC DEVELOPMENT PLAN 2011-2014

This plan included a key objective to deliver a 21st century tourism offer. Whilst recognising that the present industry is an important economic sector and the product is a well-recognised tourism destination, the plan expressed concern over the following three points:-

- The typical current visitor profile is that of low spenders.
- There has been no discernable growth in visitor numbers over the past few years.
- The revenue earned by each visit is relatively low.

Though there must be some doubt as to the credibility of the 'Eco-Island' aspiration, the current plan outlines 10 key actions which will help address the areas of concern.

1. Investment Fund 2. Maintaining natural assets 3. Identity & place-making 4. Existing businesses 5. New Businesses	6. Targeted Marketing 7. Event visitor marketing 8. Eco-Tourism 9. Visit England 10. Solent LEP

THE ISLAND PLAN

The Isle of Wight Council Core Strategy (including Minerals & Waste) and Development Management Policies DPD adopted March 2012

In principle, this strategy is all about 'place-shaping'. It provides a framework for both public bodies and private investors which aims to promote the environment, the economy and social well-being.

The local authority's planning policy for tourism is as follows:-

TOURISM PLANNING POLICY SP4

- The Council will support sustainable growth in high quality tourism and proposals that increase the quality of existing tourism destinations and accommodation across the Island.
- To reflect the special tourism offer of the Isle of Wight, proposals for tourism related development should utilise the unique characteristics of the historic and natural environments, without compromising their integrity.
- The Council also wishes to see the Island become an all year round tourism destination which develops green and new niche tourism products, and development proposal should reflect this.

- Whilst the target is to improve and maintain the quality of existing tourism destinations and accommodation, a loss of bed spaces through redevelopment or conversion to other uses will be permitted where it can be demonstrated that the use is no longer viable and that the premises/site has been marketed for at least 12 months at an appropriate market price.
- Tourism-related development proposals should maintain a mix of tourism accommodation that offer a range of styles, types and quality of provision and make use of current or former tourism sites wherever possible.

In addition the transport planning policy SP7 states that:

- The Council will support proposals that maintain the current choice of routes and methods of crossing the Solent to ensure future flexibility and deliverability of service.

- Proposals to improve key interchange areas that link the Island to the mainland will be supported.

CROSS-SOLENT FERRY SERVICES REPORT - MAY 2014

IW COUNCIL SCRUTINY COMMITTEE RECOMMENDATIONS

1. It is recognised that services can only be operated on a cost effectiveness basis and this involves the need to attract additional traffic on routes with the prime stimulus being through economic growth particularly in tourism.

2. Smaller businesses should be encouraged to work together, or through the Chamber of Commerce or Federation of Small Businesses, if they wish to negotiate reduced fares with operators.

3. The work being undertaken by all the operators to engage with users are very welcome and this needs to be built on and made a regular and continued feature of marketing activities and service provision.

4. The role of the Quality Transport Partnership should be reviewed to ascertain how this can be used more strategically to discuss key issues between transport operators and users.

5. Operators should be encouraged to maintain regular contact with the council through specifically nominated members and officers to ensure an effective and efficient co-ordinated structured approach to dealing with the continued development of ferry services.

6. The relevant Executive members with responsibility for planning and economic development, together with the relevant heads of service should consider the establishment of a mechanism so that the council can better assist developers coming forward with suitable applications for tourism related proposals particularly those offering quality accommodation and all the year round attraction.

7. The Leader of the Council should raise with the Solent Local Enterprise Partnership whether it can assist in creating a better understanding with the local harbour and port authorities on the implications that charges for use of facilities can have on ferry operators which can have social and economic implications for Island residents and businesses.

8. The implications of the Competition Act on cross Solent operator's ability to introduce a common fare structure for specific groups such as students and those attending mainland medical appointments should be highlighted through the media.

The primary purpose of the AONB designation is to support conservation and enhancement of the Island's natural beauty (including wildlife and cultural heritage).

However, an important part of the ongoing strategy for the AONB is to make the Island a better place to live and to visit.

16. Tourism

"As can be seen through the Our Land programme, the AONB offers a distinct marketable resource by highlighting the natural, historic and cultural elements of the landscape. This can contribute to the regeneration of coastal resort towns as a result.

The importance of tourism to the economic and social well-being of the local community needs to be in balance with the conservation and enhancement of Wight AONB. Wherever possible Wight AONB needs to promote sustainable tourism approaches and monitor the impacts of tourism on all aspects of the AONB landscape."

Specific tourism policies agreed by the AONB management plan are as follows:-

- P62 Seek opportunities to work with the tourism sector to enable sensitive approaches to increase appreciation and enjoyment of the AONB landscape, realise AONB objectives, and provide positive benefits for tourism businesses.
- P63 Encourage and support direct contribution by tourists and other visitors to the conservation and enhancement of the AONB through volunteering opportunities or through schemes such as Gift to Nature or through their membership of relevant charitable organisations and societies.
- P64 Support appropriate tourism activities and development which contribute to the viability of the tourism sector and respects the objectives of Wight AONB.

17. Access and recreation

The Wight AONB provides the location for many sports and recreational activities such as walking, cycling, horse riding, paragliding, sailing, surfing, windsurfing, kitesurfing, snorkelling and fishing. Wight AONB also provides the backdrop and space for sport and outdoor events.

Specific Access and Recreation policies agreed by the AONB management plan are as follows:-

- P65 Develop a better understanding of the use of the AONB for access and recreation.
- P66 Promote the AONB as part of relevant events (such as the Isle of Wight Walking and Cycling Festivals).

- P67 Encourage the use of the extensive public rights of way and open access areas across the AONB which provide access to its diverse and beautiful landscape.
- P68 Develop initiatives with people taking part in sports and pastimes in the AONB to better understand the relationship between their activities and Wight AONB objectives.

THE ECO ISLAND COMMUNITY STRATEGY 2008-20

This strategy sets out a plan for making the Isle of Wight “a thriving, dynamic and confident community, in balance with the local environment”.

> “*Tourism is the cornerstone of the Island’s economy. Competition is global and increasingly diverse; the Island has to compete to keep its visitors returning year after year. The Island needs to play to its strengths; clean air and beaches as well as unspoilt landscapes. It’s the aspiration of Eco Island that the Isle of Wight will become known for its eco-tourism, with visitors able to enjoy its natural beauty with minimal adverse impact on the environment*”.

THE ISLE OF WIGHT FOREST DESIGN PLAN 2007-37

This plan proposes six management objectives, most of which are aimed at preserving and protecting the natural habitat and wildlife, some of which are unique to the Island. One of the priority objectives in the plan however, is *“to promote recreation in the forests and improve facilities to attract a wider user group, including families and tourists”*.

‘PUSH’ SAILING REVIEW – TSE REPORT 2009

- Yachting tourism has broad appeal across most age groups but older families and couples are the major user groups.
- An average of 17 trips a year are taken by yachts in South Hampshire, with short breaks averaging 2-3 nights in length.
- Visiting yachtspersons are generally higher spenders than land visitors. (£189 per visit 2009 analysis).
- Approximately 400,000 yachtspersons visit the Solent each year for a short break holiday.
- Total estimated spend by yacht persons on leisure whilst in the Solent is £20.4m (2009 analysis).

THE ISLE OF WIGHT CLIMATE AND IMPACTS REPORT 2009

This report suggests that the tourism industry could be one of the winners in the climate change battle as a result of warmer and drier seasons. One uncertainty in this area is the effect sea-level rise will have on our beaches. The report states:

> *"On balance, climate change may offer more opportunities than threats to the Island's appeal to tourists. Warmer drier summers, with a longer, more reliable, tourist season offer the opportunity to attract more people. The rise in sea-level means that beaches may get narrower and marinas, quays and coastal paths will be affected. There will be even greater erosion along our soft cliff stretches.*
> *A rise in temperature could result in a decline in coastal water quality which could affect the traditional 'bucket and spade' market. Changes to the Island's flora and fauna resulting from climate change may prove to be a negative impact on special interest and 'eco-tourism' markets or may become a new opportunity.*
> *The location of the island might mean that potential appealing changes in seasonal weather (e.g. early springs) and the appearance of new and 'exotic' species occur here first in the UK. Extreme weather events will affect caravan and campsites, and festivals, along with travel disruption".*

THE ISLE OF WIGHT LOCAL GEO-DIVERSITY - ACTION PLAN 2010

The Geo-diversity Action Plan 2010 has five key action points, one of which is "The Role of Geology in the Development of the Isle of Wight Tourism Industry".

The LGAP aims to both increase public awareness, as well as, promote and support geo-conservation measures through a multipoint action plan.

The Isle of Wight is recognized as the ***best site in Europe for dinosaur remains****, with fresh exposures revealed in the ever-eroding cliffs. Large numbers of early Cretaceous dinosaurs have been found here.*

The LGAP also recognises the importance of the attractions and museums that interpret the unique geological features.

WIGHT FOOD REPORT 2013

By IW AONB & Natural Enterprise

This report takes an in depth look at Island food producers. In particular, it highlights tourism opportunities.

"9.3.1 The 'Isle of Wight Breakfast'

The Isle of Wight appears to be in a minority of county's who do not offer a 'local breakfast'. Many County Councils accredit their breakfasts. To qualify for accreditation breakfasts need to include about 6 0% of local and seasonal ingredients. The Island can provide sausages, bacon, tomatoes, eggs, muesli, bread, milk, cheese, butter, honey, preserves and fishcakes, so reaching this threshold shouldn't be a problem.

To encourage local businesses to partake, some local council's publish an online 'how to' guide. A useful example is produced for Sussex. http://www.lewes.gov.uk/Files/sussex_breakfast_A5_leaflet.pdf. As well as detailing the practicalities, this leaflet also explains the commercial and ethical advantages of local breakfasts and links food and tourism back to the living landscape.

APPENDIX C

VISIT ISLE OF WIGHT MARKETING STRATEGY 2014-2015

PLEASE NOTE THAT THE NOTES BELOW HAVE BEEN TAKEN FROM A PRESENTATION BY DAVID THORNTON IN **DECEMBER 2013**. DAVID INTENDS TO BRING THIS STRATEGY UP TO DATE AS AND WHEN PARTNERS AGREE ON FINAL OBJECTIVES AND ACTIONS OF THE DMP.


VisitWight.org
543
Within 5 years aim to secure a marketing spend of £4million a year
(includes PR and affinity value) to attract an extra 300,000 visitors a year
(2.7 to 2.8million visitors a year)


VisitWight.org
Recommendation (1)
Run theme park resort style marketing at low and middle markets in London, South Coast, Oxfordshire up to Birmingham
Run great outdoors, spa breaks, luxury getaways, rural retreat promotions PR and marketing at middle to higher end markets in London, South Coast, West and East Midlands
Develop attractor events platform to draw overnight visitors when they take place. Develop and introduce new events. Run island coverage for repeaters

Recommendation (2)

Develop two promotional months: February and October (start at half term and develop into month long attractors)

Look to establish one new "event" capable of attracting upwards of 25,000 people over a long weekend

Explore emerging markets like China (England in a nutshell) through Visit England and Visit Britain

Deploy multi channel marketing approach as outlined

Strategy "tweaks"

- Grow Visitor appeal and voice through bringing together heritage, arts and culture voices with tourism
- Be more selective about events we support, but put more effort behind those we do
- Understand how others are tracking / evaluating us and develop appropriate structures and procedures
- Place higher priority on, and resource into attracting more private sector funding, advertising and sponsorship
- Introduce a more focussed CRM strategy
- Introduce groups webpages and guide to back up press activity