



Isle of Man

DESTINATION MANAGEMENT PLAN **2016-2020**

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Foreword

The mission of the 2016-2020 Destination Management Plan (DMP) is to promote and develop the Isle of Man as a place to visit, live, work and invest.



Tourism is a significant element of the Isle of Man's economy and touches residents' lives in many ways. The money visitors spend helps to create almost 3,000 jobs (around 7% of the workforce) and sustain a much wider range of shops, restaurants, suppliers, transport services and other amenities for residents to enjoy.

However, competition for the tourism pound from destinations abroad and the UK is fiercer than ever and the Isle of Man will need to work hard to maintain its position and realise opportunities to grow its share of the tourism market.

The mission of the 2016-2020 Destination Management Plan (DMP) is to promote and develop the Isle of Man as a place to visit, live, work and invest. The tourism sector underpins so much of the local economy that we need to stop thinking of it as a standalone industry. It not only creates jobs in its own right, but also supports a vast array of services across the

Island, giving residents a much higher quality of life.

This new strategy sets out a comprehensive analysis of the current state of tourism on the Isle of Man, highlighting the current offer and market trends over the past decade.

The results from research and investigation have shown that the forecast growth for the Isle of Man tourist industry requires the sector to seek markets offering significant sustainable growth.

Without direct intervention and diversification into new markets, the Island's visitor numbers will stagnate by 2020. This reality has led to the creation of a bold set of aims and objectives for the next five years.

In order to respond to this challenge we must create a common sense of purpose and strategic direction amongst private and public sector tourism interests on the Isle of Man with the intention of:

- Encouraging stakeholders to work together for the overall benefit of the visitor economy;
- Increasing job opportunities for local residents; and
- Developing facilities, infrastructure, services and events for visitors and residents to enjoy.

The DMP will help direct the development, management and marketing of tourism and the visitor economy in the Isle of Man for the period 2016 to 2020. The aim is also to set the direction and lay the foundations for the future development of tourism on the Isle of Man beyond 2020.

Hon Laurence Skelly MHK
Minister for Department of
Economic Development

Executive Summary

Why the DMP?

Tourism is the most competitive economic sector, generating jobs in its own right as well as underpinning all other business sectors on the Isle of Man.

However, if the Isle of Man chooses to stay where it is currently, it will not only have an impact on the quality of life for residents but also negatively impact on inward investment opportunities for the Island's economy.

Therefore, to realise its full potential in an increasingly competitive market, the Isle of Man needs to reposition itself as a Destination but this will require a joined up approach and a significant change of culture.

Aims

This will be accomplished by working in partnership with tourism and visitor economy businesses, transport carriers and across government to increase the contribution of the sector to the Isle of Man economy by 20% in real terms of value by 2020.

This will be achieved by a shift in focus to target potential growth leisure markets, specifically the UK short break and family markets, and to consolidate business and visiting friends and relatives (VFR) markets which are currently in decline. In addition, the priority will be to extend the season by introducing new events, supported by low season marketing campaigns and associated promotional activity.



Objectives

To achieve this growth, the DMP sets out 5 key strategic objectives to ensure a targeted and consistent approach to promoting the Isle of Man:

- 1. Strengthening collaboration and partnership working**
- 2. Promoting the Isle of Man's image and distinctive strengths to target markets**
- 3. Creating an exceptional visitor experience**
- 4. Championing new investment and product development**
- 5. Creating and maintaining a programme of market intelligence to direct strategy and measure achievement**

The strategic aims are all supported by specific key actions in order to provide a direct plan of action over the next five years. This should help to drive the DMP as a practical plan rather than an abstract guide.

Importance of Tourism

Tourism has been an important element in the economy of the Isle of Man for over a century. Like other traditional seaside resort destinations around the British Isles which had their peak in the 60s and 70s, it has lost market share to low cost sunshine holiday destinations abroad.

In recent years significant ongoing investment has taken place to enhance the Island's transport and heritage attractions and build on the Island's principal brand, the TT Races.

However, overall the Isle of Man faces the same challenges as other coastal destinations in the UK and those which are particular to being an Island.

Tourism underpins the economy of the Isle of Man and represents a significant economic opportunity for the future. There would be far

fewer shops, restaurants, pubs, arts and entertainment facilities and events; less income to sustain local heritage attractions and stimulate Manx culture; and more limited transport connections by air and sea which would have implications for every aspect of Isle of Man life and would make the Island a much less attractive place to live, work and attract inward investment.

To realise the full potential of tourism in an increasingly competitive market, the Government, local government and the private sector will need

to work together with common mission to stimulate growth and champion development.

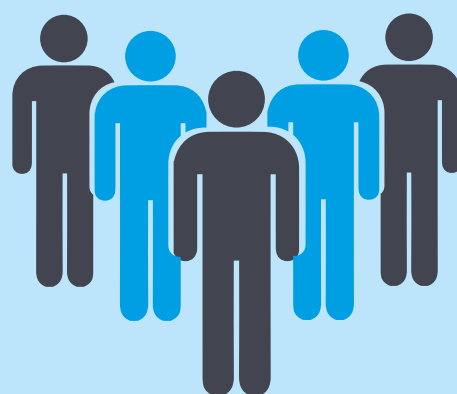
This DMP is intended to be a catalyst and provide the direction for this to happen.



Research

Research into the current Isle of Man offering, perception and potential markets has been taken into account from the following documentation:

- Isle of Man Annual Passenger Survey
- The Digest of Economic and Social Statistics
- Isle of Man visitor and industry surveys
- Great British Tourism Survey
- International Passenger Survey.
- Destination Audit Review 2012 & 2015



2,800 people
7% of available workforce

Almost 3,000 people are directly employed in the Island's tourism sector, representing around 7% of the available workforce, it underpins the livelihoods of many more.

Where are we now?

It is important that the DMP is based on solid evidence rather than opinion and assumption. With this in mind, a comprehensive audit was undertaken in 2012/13 and refreshed in 2015 assessing supply and demand relating to the tourism offer with comparisons with a selection of destinations, including Jersey, Isle of Wight, Devon, Cornwall and Cumbria.

All destinations, and in particular Islands, have unique characteristics and circumstances so comparisons need to be judged with this in mind. However, they are potentially useful benchmarks in helping to determine relative strengths and weaknesses and what makes the Isle of Man particularly distinctive. Examining other comparable destinations can also point to better ways of doing things.

We have also drawn research from the Isle of Man Annual Passenger Survey, the Digest of Economic and Social Statistics and the most recent Isle of Man visitor

and industry surveys. National and international trend data was sourced from the Great British Tourism Survey and International Passenger Survey. A full analysis is provided within the Destination Audit Review.

The current performance of Isle of Man Tourism is broken down into three sections:

- Current offer
- Trends
- Forecast



Our Current Offer

ISLE OF MAN TT

The TT Races is the Island's principal tourism asset which gives it national and international profile. Its popularity is still growing so it is important to consider how best to further support the TT and other motorsport events and take full advantage of the benefits they can bring at other times of year.

NATURE

The Isle of Man has a very strong coast, countryside and unique small Island offer with a range of landscapes, including rugged headlands, pristine beaches and moorland within a short distance. It boasts a 100 mile coastal footpath, 28 mile Millennium Way and other marked trails and events such as the End 2 End mountain bike race which take full advantage of the Island's natural assets. The wilder parts of the Island are rich in birdlife, marine life, biodiversity and unspoilt countryside some of which is looked after by a number of wildlife and conservation organisations.

VISITOR ATTRACTIONS

There are at least 77 visitor attractions on the Island. This is double the number in Jersey but slightly fewer than those on the Isle of Wight. The Manx National Heritage portfolio is a key component of the attraction offer and a major selling point to both independent and group travellers as is the heritage transport system. In terms of Trip Advisor feedback the Steam Railway was ranked highest with the Manx

Electric Railway and Snaefell Railway all in the top 11 'Things to Do'. They are the 'stand out' attractions which differentiate the Island from other destinations. The operational window of attractions tends to be from Easter through to the end of October as dictated by the flow of visitors, although there has been a recent push to extend the opening of key heritage attractions.

CULTURE

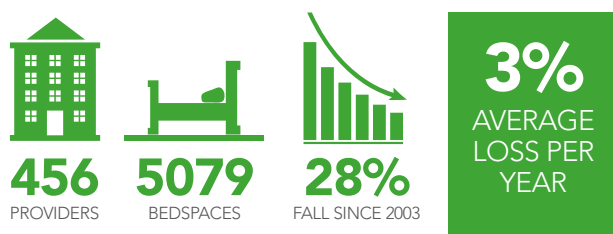
Manx Culture is a strong differentiator with greater potential appeal in the form of myths and legends, language and Viking and Celtic origins. The Island's contemporary culture is also developing a profile on the Island through publications such as 'Gallery Magazine' and new arts venues opening and hosting more exhibitions of local artists. However, the Island's contemporary and popular music festival programme is embryonic compared to most comparable destinations such as the Isle of Wight. Although the UK music festival scene has experienced over-capacity in recent years, niche festivals continue to develop and there is potential for the Isle of Man's emerging cultural offer to grow given an appropriate level of promotional support.

EVENTS

A hugely varied landscape in a compact area combined with a vibrant sporting and cultural community means that the Isle of Man is well placed as an event destination. With over 40,000 visitors, the Island's signature event is the TT Races, however sitting

below this are a host of small and medium-sized events with a strong enough draw to attract visitors in their own right. These include on and off-road cycling, outdoor adventure and endurance events, athletics, bowls, darts, walking, as well as sailing events. The flagship TT Races event is complemented by other motorsport events including car rallies, motorcycle road races, such as the Isle of Man Festival of Motorcycling, and off-road events. Event development needs to form a cornerstone of future product development especially to generate shoulder and low-season business.

ACCOMMODATION



Statistics based on 2014

SERVICE ACCOMMODATION

The statistics only tell half the story as most of the loss of bedspace capacity has occurred in the lower-end of the 2 and 1 star serviced accommodation sector through conversion to residential or closure as a result of rising market expectations. The Island's 3 and 4 star hotels all cater for a mix of leisure and business visitors, groups booked through coach companies, tour operators and independent travellers.

SELF-CATERING ACCOMMODATION

In contrast the self-catering sector has been growing, particularly at the higher end of the quality range, again reflecting the growing expectations of the family and couples market that tend to opt for the freedom of this accommodation type.



The capacity of the Island is also enhanced by a further 20 temporary campsites and rooms in residents' homes offered during the TT Races fortnight.

INFRASTRUCTURE

FERRY - daily sailings to and from Heysham as well as frequent spring, summer and autumn services to and from Liverpool, with a less frequent service operating during winter. There are also summer services to and from Belfast and Dublin, with the Dublin route also operating at Christmas.

FLIGHTS - to numerous airports in the United Kingdom and Ireland, as well as further afield. Budget operators Flybe and EasyJet now fly regular scheduled services to the Island making it increasingly accessible for leisure visitors, business travellers and visiting friends and relatives (VFR).

PUBLIC TRANSPORT - The Island benefits from a comprehensive public bus service. The Island's transport infrastructure is supplemented by the Isle of Man Steam Railway which runs between Douglas and Port Erin, the Manx Electric Railway between Douglas and Ramsey and the Snaefell Mountain Railway.

MARINA - The Island's largest commercial marina is located in Douglas, with a smaller harbour in Peel on the west coast and the provision of a working harbour at Ramsey on the north east coast. The smaller ports of Laxey, Castletown, Port Erin and Port St Mary are able to provide moorings for smaller craft, though capacity for visiting boats is very limited.

Trends



Approximately 277,000 visitors made the trip to the Isle of Man for leisure and business purposes in 2014. The vast majority were from the British Isles (90%) and stayed overnight for one or more nights (91%) spending between them £107.7m on their visit.

On average staying visitors spent £392 and day visitors £115 per trip which is a reflection of the length of stay and the costs associated with travel.

TRENDS OVER THE LAST 12 YEARS

In broad terms the volume of visits to the Isle of Man

over the last 12 years has steadily fallen by an average of 1.7% a year.

The start of the global economic downturn in 2008 is widely considered to be the main factor putting a squeeze on discretionary leisure and corporate spend. In that year 15% fewer visits were made to the Island than in 2007. There was some recovery through to 2011 but volume fell again in subsequent years through to 2014. Overall visits in 2014 were 16.5% lower than in 2003.



OUR CURRENT VISITOR PROFILE



47%
VISITORS
AGED 55+

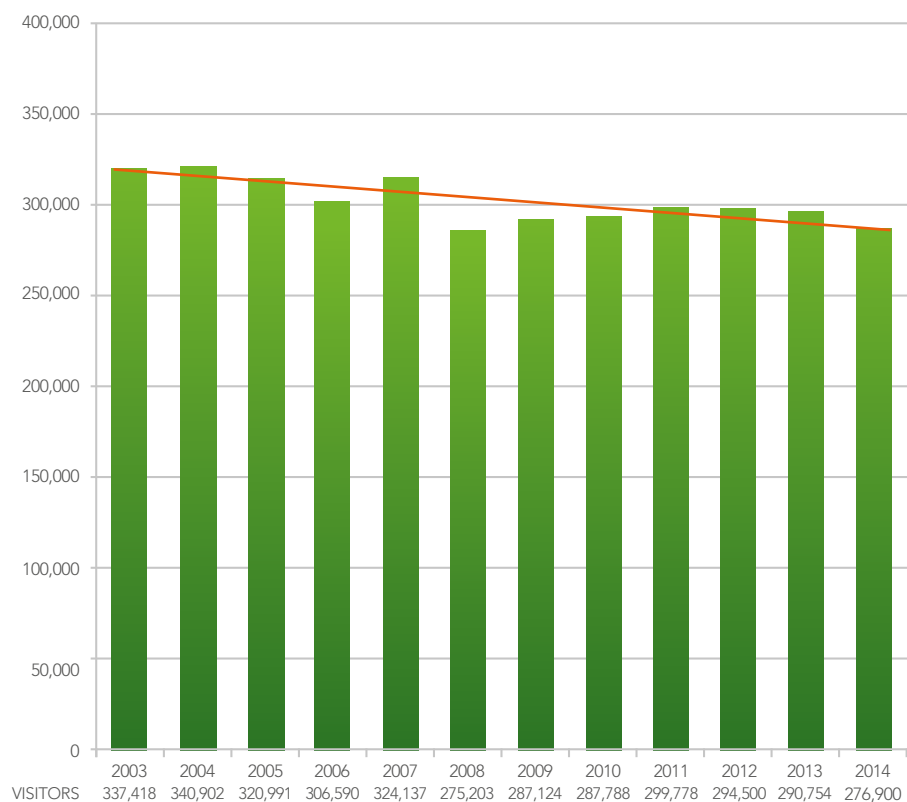
STAY
FOR
MORE
THAN

4
DAYS+



68%
VISITORS
WITHOUT
CHILDREN

ANNUAL VOLUME OF VISITORS 2003-2014



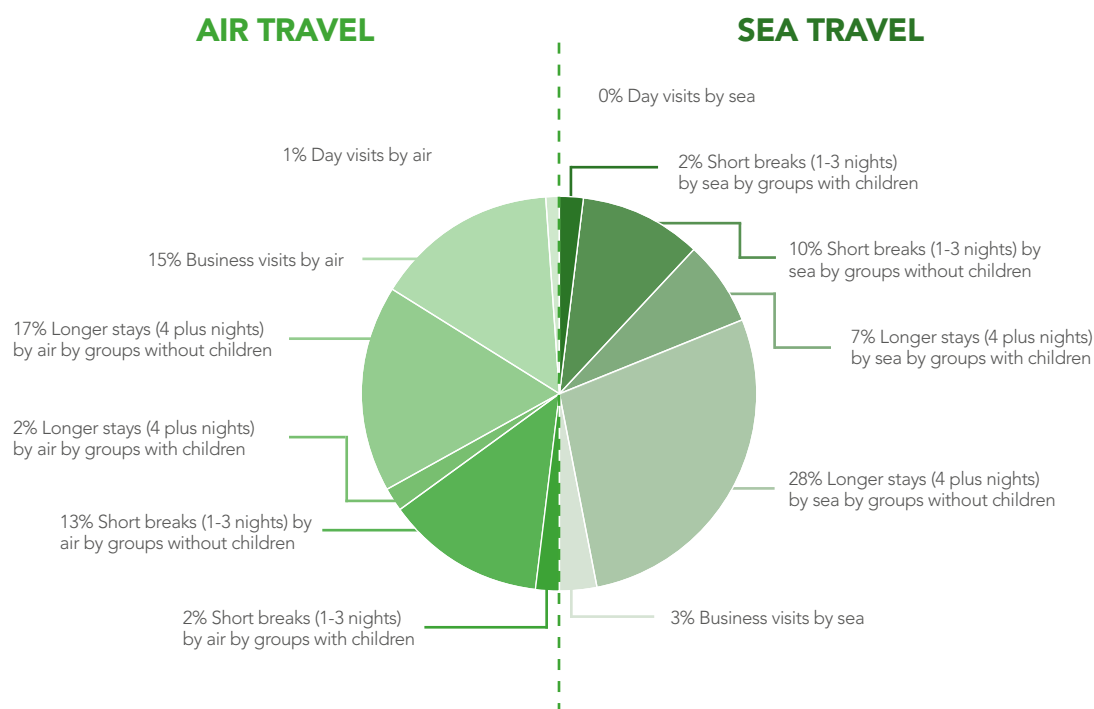
VISITOR PROFILE

The vast majority of the Isle of Man's visitors come from the UK. Only 10% are from outside which is higher or on a par with UK comparator destinations but, as might be expected, well below the figures for Jersey. The North West of England is by some margin the Isle of Man's most important source of visitors (35%) with the South East (16%) and Midlands (13%) ranking second and third. The catchment populations for sea and air routes are key factors in this.

The share of visitors between sea and air carriers in 2014 and throughout the last decade has been more or less even, although

it has fluctuated as new routes, services and price deals have been introduced. EasyJet's arrival in May 2010 with flights to/from Liverpool and the addition of London Gatwick in October 2012 was undoubtedly a factor in air route volumes increasing up to 2013. Market trends since have also had an effect, with the fall in business travel associated with the recession, for instance, more acutely impacting on air travel.

The pie chart below shows the broad visitor segment split between air and sea travel in 2014.



By far the Island's biggest market is visitors without children (mainly couples) on long and short visits (68%). Approximately twice as many longer stays (4+ nights) arrive by ferry than air whereas the split of short breaks (1-3 night) is more even. Only 13% are in

family groups and around 70% of these arrive by sea. This reflects similar visitor surveys carried out over the main tourism season showing that around half of the Island's visitors are over the age of 55.

PROFILE OF OVERNIGHT VISITORS

	% of leisure/ holiday visits	% of VFR visits	% of business visits
Isle of Man	39%	38%	23%
Jersey	65%	20%	15%
Isle of Wight	64%	25%	6%
Devon	70%	16%	14%
Cornwall	75%	20%	9%
Cumbria	48%	33%	13%

Source: Isle of Man Passenger Survey 2014 (provisional figures). Comparative data comes from visitor surveys carried out at each destination.

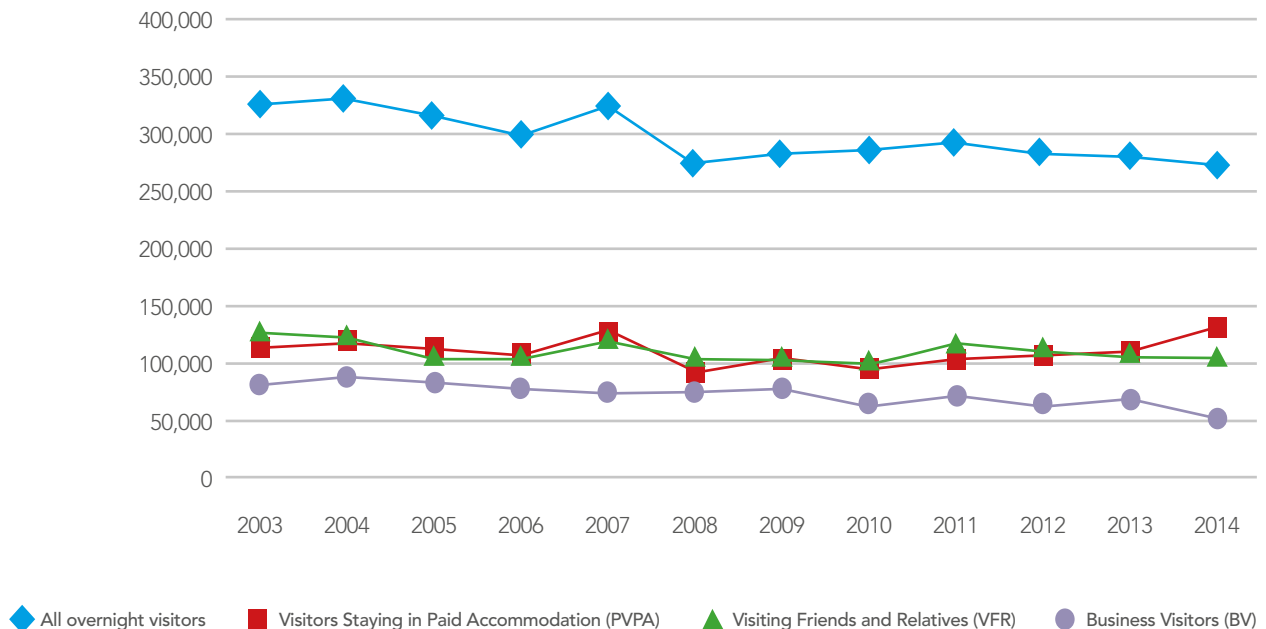
Compared to the general UK picture where domestic overnight trips decreased by 24% between 2003 and 2014 (from 151 million to 114.2 million), the contraction of the overnight visitor market on the Isle of Man has been less dramatic.

The drop in domestic tourism in the UK has in part been driven by a steady decline in the number of domestic visitors taking their main holiday in the

UK and in the number of overnight business trips. However, short breaks have increased and make up the vast majority of all UK holidays.

In contrast to domestic tourism in the UK, the number of visitors arriving from overseas has continued to grow. Inbound tourism hit a record of 34.4 million visits to the UK in 2014 (up 5.2%) and spend was up 2.8% to £21.8bn.

PROFILE OF VISITORS



Source: Annual Passenger Survey, 2002-2014. Note: These are all PVPA visitors which do not in fact include all paid for accommodation as most business visitors will stay in paid accommodation but are classified separately. For the purposes here we assume that PVPA includes those staying in paid accommodations who are leisure/holiday visitors. However, it is likely a small proportion will include VFR visitors who are paying for their accommodation rather than staying with friends/relatives.

Whichever timeframe is selected throughout the 2002-2014 period, the visitor segments which have declined the most are the same.

The fall in business visitors is the most striking. From a peak of 92,658 in 2004 business visits fell to 50,100 in 2014 - 43% fewer.

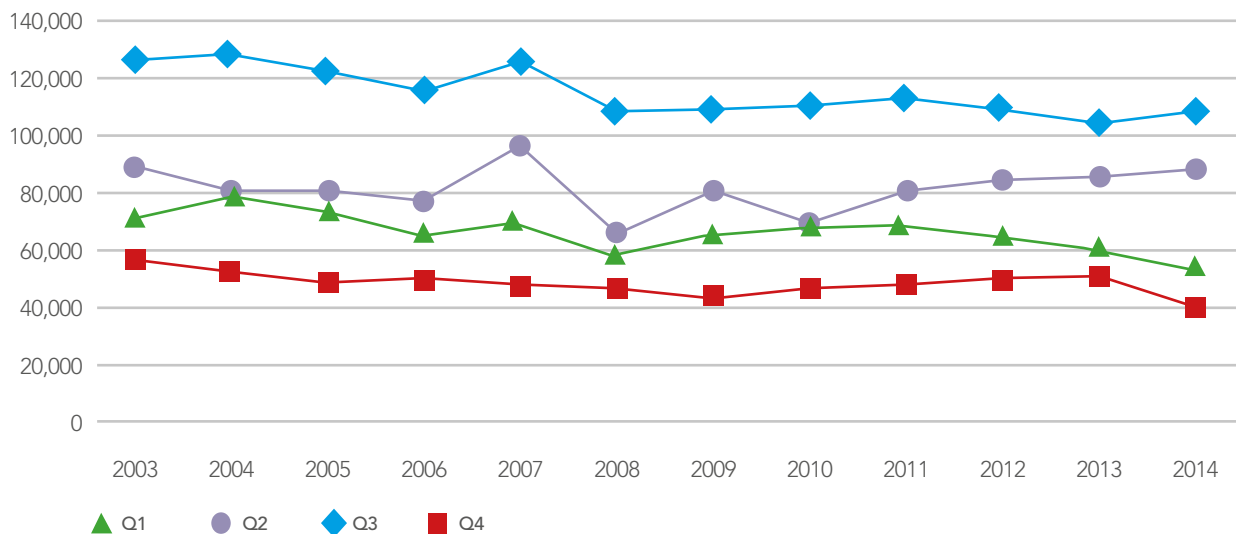
The other segment which has fallen in number, albeit at a lower rate, is VFR. Visits were 24% lower in 2014 than in 2003. There is anecdotal evidence of a correlation between business and VFR visits. The apparent decline in business 'ex pat' residents living on the Island temporarily could have impacted on the numbers of VFR coming to explore where their friends and family are now living.

Day visits accounted for just 1% of total visits in 2014 (2,600), a figure which has fluctuated greatly over the years but only accounts for a small amount of total volume.

SEASONALITY

Unsurprisingly, the busiest period for the Island is the summer (Q3) accounting for 35% of all visits. However, peak season volumes have gradually declined over the last 12 years and in 2014 were 16% below 2003 levels (103,200 visitors in Q3 2014 compared to 122,800 visitors in Q3 2003). A similar decline is evident in Q4, the quietest period when many attractions and accommodation businesses are closed, whereas Q1 and Q2 volumes have shown more resilience.

Annual change in visitor volume by quarter

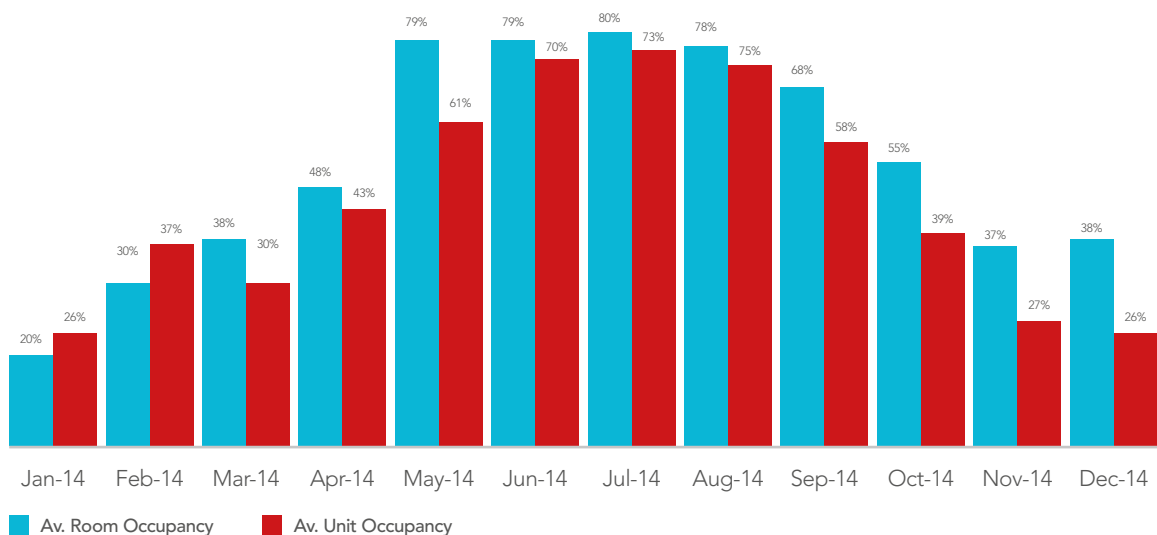


ACCOMMODATION SECTOR

The seasonal nature of tourism is clear to see in the average occupancy rates for serviced and self-catering accommodation drawn from the Isle of Man Occupancy Survey.

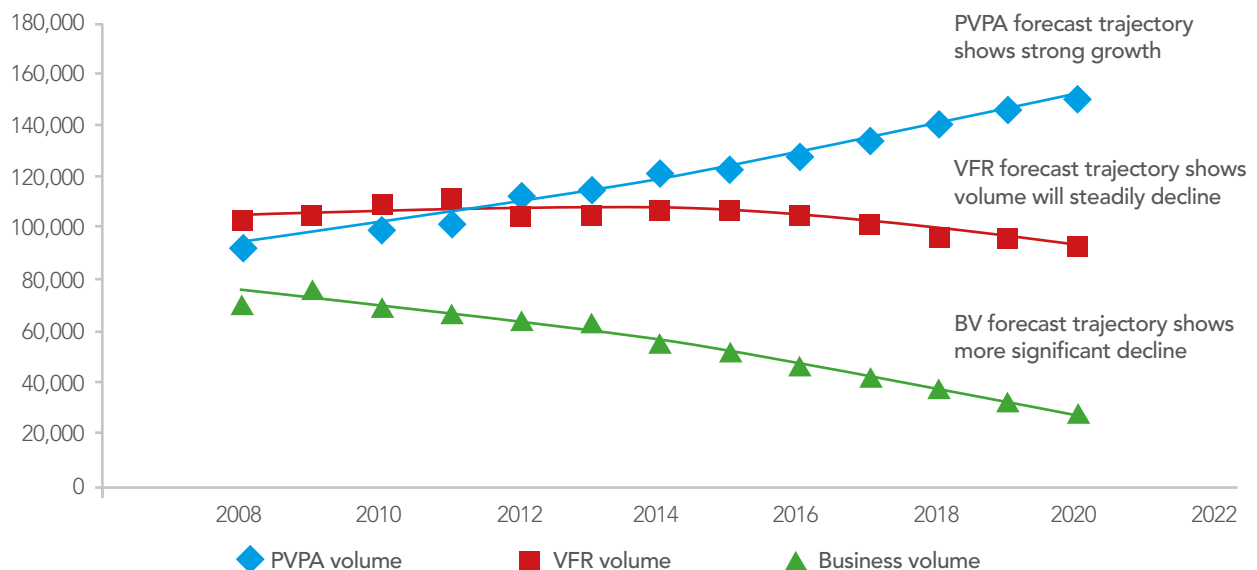
The average occupancy level among accommodation businesses on the Island is lower than comparator destinations. In Jersey and Cumbria, average room occupancy among the serviced sector is around 62% compared to 54% on the Isle of Man.

The annual average unit occupancy among self-catering businesses on the Isle of Man is 47% compared to 58% in Cumbria.



Forecast

The graph shows the individual forecast by visitor type: although there is predicted to be a continued growth in leisure (PVPA) visitors, visiting friends and relatives (VFR) volumes continue steadily to fall and business visitor (BV) volume continues to fall significantly.



This forecast, if correct, would predict a near stagnation of visitor numbers to the Island and a significant reduction in business visitors spending on serviced accommodation, subsistence/hospitality food and beverages.

The continuing downward trend of inbound visiting friends and relative visitors would potentially impact on attractions and again the food and beverage sector. The increase in leisure visitors would barely make up for the loss

of business and visiting friends and relative visitors, but would potentially help those offering accommodation, attractions and food and beverages aimed at the leisure market.

Continuing on the current path will, at best, result in static visitor growth and spend through to 2020.



‘DESTINATION

Where we want to be

The mission of the DMP is to promote and develop the Isle of Man as a quality leisure tourist destination, through implementing a range of strategies directed towards increasing the economic and social benefits from tourism and the visitor economy - and continuing to enhance perceptions of the Isle of Man as **a place to visit, live, work and invest.**

The aim is to grow the tourism and visitor economy sector consistently in a sustainable manner, thereby increasing its contribution to the livelihoods and quality of life for residents.

The most important element of a structure to develop the Isle of Man visitor economy is to develop a **‘Destination First’** mind set amongst stakeholders. This requires an understanding of the benefits of, and commitment to, collaborative working.

This will be accomplished by working in partnership with tourism and visitor economy

businesses, transport carriers and across Government to increase the contribution of the sector to the Isle of Man economy.

Destinations where a clear leadership role is defined with respect to the development of the visitor economy, and where transparency and collaborative working with stakeholders are the norm, tend to be more successful. This depends not on the lead organisations undertaking every task, but on it having a strategic understanding of the tourism sector and being able to work collaboratively with other

organisations that impact on the visitor experience, but which may not have the visitor at the forefront of their responsibilities.

Effective destination management requires the involvement of all stakeholders through clear communications and transparent decision making. In particular, this requires proactive engagement between the key partners:

- The Government
- Visitor Economy Strategy Group
- Local Engagement



FIRST'

A PLACE TO VISIT, LIVE,
WORK AND INVEST.

► Targets for success

This will be accomplished by working in partnership with stakeholders to increase contribution of the sector to the Island economy.

THE MISSION

The mission of the DMP is to promote and develop the Isle of Man as a quality leisure visitor destination, through implementing a range of strategies directed towards increasing the economic and social benefits from tourism and the visitor economy, and continuing to enhance perceptions of the Isle of Man as a place to visit, live, work and invest.

THE AIM

The aim is to grow the tourism and visitor economy sector consistently in a sustainable manner, thereby increasing its contribution to the livelihoods and quality of life of residents.

This will be accomplished by working in partnership with tourism and visitor economy businesses, transport carriers and across government to increase the contribution of the sector to the Isle of Man economy.

This will be achieved by a shift in focus to target potential growth leisure markets, specifically the UK short break and family markets, and efforts to consolidate business and Visiting Friends and Relatives (VFR) markets which are currently in decline.

In addition, the priority will be to extend the season by introducing new events, supported by low season marketing campaigns and associated promotional activity.

► Projected growth for 2020

THE OUTCOME

The table below outlines the actual outcome in 2014 and the potential projected outcomes for 2020. The projections reflect three possible outcomes. These are as follows;

- A 'worst case' scenario of a decline in volume and value of 1.1% per annum. This assumes no change in the strategic direction of the destination.
- A 'most likely' projection based on a 2.0% increase in volume and value per annum. This assumes that the aims to achieving growth outlined in the DMP are implemented.
- A 'best case' projection based on a 4.0% increase per annum. This assumes that the aims to achieving growth outlined in the DMP are implemented, and that economic growth in the UK and Isle of Man will result in a significant increase in leisure, business and VFR visitors during the period.

CONTRIBUTION	ACTUAL 2014	PROJECTED 'WORST CASE' (-1.1% PER ANNUM)	PROJECTED 'MOST LIKELY' (+2.0% PER ANNUM)	PROJECTED 'BEST CASE' (+4.0% PER ANNUM)
VALUE £	108M	101M	122M	137M
VOLUME	277,000	259,200	311,900	350,500

► So how do we get there?

How do we get there?

This section of the DMP provides a summary of the Strategic Objectives and Programme of Activity that will be undertaken for the period 2016 - 2020.

The Strategic Objectives are based on evidence and research that has been reported and commissioned over the past two years by Isle of Man Tourism. They cover the 5 key aspects of development for the Visitor Economy up to 2020 and will be supported by annual Operational and Marketing Plans showing each year's work in more detail.

The Strategic Objectives that will be implemented during the period 2016 to 2020 are as follows.

1. EFFECTIVE PARTNERSHIPS:

Building new kinds of partnership working across public and private sector tourism interests to deliver the DMP's vision and mission.

2. PROMOTION & MARKETING:

Promoting the Isle of Man's distinctive image and offering to strengthen existing and attract new, year-round growth markets.

3. VISITOR EXPERIENCE:

Providing an exceptional visitor experience that creates lasting positive memories and compels visitors to return and recommend the Isle of Man to others.

4. PRODUCT DEVELOPMENT:

In line with market needs and opportunities create a positive environment for investment and reinvestment in product development.

5. RESEARCH & INTELLIGENCE:

Creating and maintaining a strong programme of market intelligence gathering on which to base strategy and measure achievement.



Effective Partnerships

Building new kinds of partnership working across public and private sector tourism interests to deliver the DMP's Vision and Mission.

OBJECTIVE: To have consistent private/public marketing of the Isle of Man as a destination. This will lay a solid foundation for product and market development.

Destinations where a clear leadership role is defined with respect to the development of the visitor economy, and where transparency and collaborative working with stakeholders are the norm, tend to be more successful. This depends not on the lead organisations undertaking every task, but on it having a strategic understanding of the tourism sector and being able to work collaboratively with other organisations that impact on the visitor experience, but which may not have the visitor at the forefront of their responsibilities.

Effective destination management requires the involvement of all stakeholders through clear communications and transparent decision making. In particular, this requires proactive engagement between the three key partners: the Government, Visitor Economy Strategy Group and local government and businesses involved in the sector. As such, a three -tiered structure is proposed to oversee the implementation of the DMP and future development of the destination.

“ The Isle of Man needs to focus its visitor economy strategy on an Island wide **'Destination First'** outlook. Within the private sector there is naturally a tendency to look inward to our own businesses to encourage growth and development. But we also need to look outward to see how our businesses fit in with the Isle of Man experience and how we can better improve the destination's reputation and our visitors' experience on Island.

The Visitor Economy Strategic Group recognises the need for a new direction and we are working industry-wide to ensure that the DMP is embraced by visitor economy stakeholders. By working together in this way we can safeguard an important contributor to the Island's economic and social fabric, embrace new trends and markets and enhance the Island's reputation as a first class visitor destination.”

Brett Martin
Deputy Chairman, Visitor Economy Strategic Group

The structure and roles are outlined below.

- 1. Government** - Strategically lead and co-ordinates economic and policy development, legislation, destination marketing and research.
- 2. Visitor Economy Strategy Group**
– Board level 'ownership' of the DMP, setting objectives, directing and managing implementation and measuring performance.
- 3. Local Engagement**
– Engagement with stakeholders and local businesses, identification of needs, management and delivery of the plan at a local level.

Similarly, there are opportunities to work collaboratively with key industry partners more cost effectively in raising awareness and increasing the number of visitors.

Destination marketing has traditionally been the preserve of the public sector. The private sector could and should be encouraged and assisted to promote their business under the destination brand.

We have outlined two focus areas to achieve the strategic objective of building new, working partnerships.

This includes working with transport operators to sustain and develop routes and working across government and local government to achieve success.

Work with transport operators to sustain and develop routes:

Sustaining sea and air routes is fundamental in growing the tourism and visitor economy for the Isle of Man. More emphasis will be given to working in partnership with the Department of Infrastructure and sea and air carriers in maintaining capacity and frequency of key leisure and business visitor routes.

Work across government and local government to achieve success:

Central government comprise a number of departments, most of which involve or have a bearing on the tourism and visitor economy sector. Typical cross-cutting issues include countryside matters, parking, event organisation, transport, research, beach maintenance, public realm management, planning, sign posting and toilet provision amongst others.

KEY ACTIONS FOR WORKING WITH TRANSPORT OPERATORS: 2016 – 2020

- Work with the Department of Infrastructure to develop a strategic plan for the future security and sustainability of key air and sea routes
- Working with major carriers to develop a planned programme of low season marketing initiatives to smooth bed and load patterns and assist in extending the season
- Encourage carriers and tour operators to work together to take advantage of inclusive tour fares

KEY ACTIONS FOR WORKING ACROSS GOVERNMENT AND LOCAL GOVERNMENT: 2016 – 2020

- Establish a programme of formal and informal meetings and briefings with key relevant government and local authority officers.



Promotion & Marketing

Promoting the Isle of Man's distinctive image and offering to strengthen existing and attract new, year round growth markets.

OBJECTIVE: To define target markets and use cross-platform marketing campaigns to raise awareness. This will define the market areas for growth in line with the 20% target increase.

The Isle of Man finds itself in a very competitive environment with destinations throughout the UK and overseas, some with much larger budgets, trying to entice the same markets.

The growth in low cost airlines and ease of bookings via the internet add to the challenges. The Isle of Man needs to give existing and potential customers a compelling reason why they should visit the Island over and above other destinations.



► Target New Growth Markets

PRIMARY GROWTH:

These offer the best strategic fit between market potential and opportunity for the Isle of Man. These are families and empty nester couples, cruise passengers and motorsport visitors

ADDITIONAL NICHE:

Walkers, cycling holidays, groups/coach parties special interest, heritage, marine tourism and conference market.

CORE MARKETS TO STABILISE:

Both visiting friends and family and business visitors are in decline. They are too important to the Isle of Man economy to ignore. The ambition of the DMP is to stabilise these markets so that they contribute rather than detract from the growth market targets.

We have outlined **four focus areas** to achieve the strategic objective of promoting the Isle of Man.

TARGET NEW GROWTH MARKETS

Maintaining the Isle of Man's profile in the marketplace, projecting positive messages about what makes the Island special and stimulates visits will be a core activity for the duration of the DMP and will be the area of most interest to key stakeholders and local businesses.

The markets with growth potential which fit the Isle of Man's offer and aspirations for attracting year round businesses are:

PRIMARY GROWTH

UK Families

- Children aged 12 and under
- Short breaks (1-3 nights) and longer holidays (4 nights plus)
- Primarily drawn from the North West
- Can include core family group, separated and extended
- Travel by ferry/car

Responsive to:

- Beaches
- Self-catering, including camping at all price points
- Holiday centres offering child focused facilities e.g. swimming pool, entertainment and general activity
- Plenty to do, wet weather options, new experiences and challenges, including leisure activities
- Safe and friendly environment

Short Breaks

- Average of 4 nights based on a typical visitor to the Isle of Man
- Key target market 50+ couples and empty nesters
- Located UK and near Europe
- Travel by ferry/car or budget airlines
- General holiday or special interest
- Higher spending than families and coach groups

Responsive to:

- Range and choice across all types of accommodation, including high end resort spa/golf hotels
- Quality places to eat – in serviced hotels and restaurants throughout the destination
- Speciality retail, arts and crafts, 'café culture'
- Broad range of cultural events, heritage attractions, natural environment and gentler activities such as walking

The majority of the marketing activity over the next five years will be aimed at these broad segments whilst also supporting niche market opportunities as well as stabilising core markets such as VFR and BV which are in decline.

There are, however, other niche market opportunities that the Isle of Man should not ignore, in particular extracting greater year round value from the TT Races association in developing additional motorsport events and assessing the opportunity in creating a TT based visitor attraction.

In the medium to longer term the growth of the cruise market is also an important secondary opportunity given the Island's potential position as a stopover for around Britain and Ireland cruises.

Other off-peak (shoulder season), higher value niche segments have been identified as having growth potential and will be included in the DMP programme subject to available resources.

In summary, the key markets that will be targeted during the duration of the DMP are described in more detail in Appendix.

TARGET AUDIENCE/VISITOR PROFILES

In order to understand who our visitors are, Isle of Man Tourism has researched and analysed our customer database which has resulted in the audience/visitor profiles. This work has given us a better understanding in which to directly target visitors with marketing campaigns and advertising.

It is important to understand the visitors' motivations, concerns and interests. By breaking down the primary growth target markets into a specific set of detailed audience/visitor profiles we can better understand their needs and better target our promotion and marketing.

Customer profiling is very important as consumer behaviour is constantly changing with new trends influencing decision making and attitudes. This form of audience profiling lets us understand customers in more depth rather than more traditional variables of age and location. The 4 developed profiles explore the specific behaviours of our target markets, their wants and needs alongside the demographic information.

The defined primary growth target segments have been broken down into 4 specific audience/visitor profiles. These are:

- Our Timers - generally couples and groups of friends in their 60s
- Trusty Travellers - usually couples aged 50+
- Work hard, play hard - tend to be mid-20s to 40 somethings
- 2.4 Explorers – adventurous families with children

The profiles were derived from primary research undertaken with Strategic Marketing into why people do and do not visit the Isle of Man. This has been mapped into external research into UK consumer behaviour, otherwise known as TGI (Target Group Index) data. TGI data is a form of consumer insights that creates audience profiling for media planning and buying.

Audience Profiles



'Our Timers'

(Approx. 2.7m in the UK)

"Our Timers like to live well and have both the time and the money to do so. They're looking for a break where they can enjoy good food and drink and indulge in some light activity in beautiful surroundings. Discerning high-spenders, Our Timers have worked hard in life and now in retirement like to take multiple breaks per year to enjoy themselves."



'Trusty Travellers'

(Approx. 2.8m in the UK)

"Trusty Travellers are pragmatic and sensible. Content with their place in life they are happy spending time with family and friends. They are active and enjoy being outdoors. They don't like to go too far from home but do like to try new things on holiday. Holidays are time for getting away from it all."

Who they are

Our Timers are generally couples and groups of friends in their 60s. They are well educated and well travelled. These days they're most likely retired usually having held senior professional positions in their careers, or built their own businesses. This means they are affluent and have both the time and the money to enjoy and reward themselves. You'll find them living comfortably in semi-rural and suburban homes.

How they holiday

Our Timers are discerning and like to pre-plan so require good quality information. They're mainly looking for quality cultural experiences; visiting historic houses, castles and gardens.

- Multiple holidays per year
- Short breaks, long weekends + longer trips (2/3 weeks)

Barriers to visiting

- Lack of awareness of what's here
- Might as well go further afield if making the effort
- Not a top priority on holiday bucket list
- Been before and not enough to do to warrant return / negative experience when here

Key messages

- Familiar experiences made extraordinary by our landscape
- High-quality, locally sourced produce
- Diverse wildlife and scenery
- Lots to see at your own pace
- Authentic experiences and luxury accommodation

Who they are

Trusty Travellers are usually couples aged 50+. This group are in the initial years of retirement or looking forward to retiring soon. They are comfortable in life having worked to mid-high level careers. They have grown-up families and many of this group are now grandparents. Quality family time and time spent with friends is very important to this group.

How they holiday

Trusty Travellers are most likely to holiday in the UK. Being pragmatic and sensible, they like to plan their trips in good time. Trusty Travellers are most likely to look for walking and outdoorsy holidays. They enjoy treating themselves to local food and drink at the end of an active day.

- Two holidays per year average
- Daytrips/short visits + longer 2 week holiday

Barriers to visiting

- Lack of awareness of what's here
- Ease of access
- Not enough difference between IoM and England/Ireland/Scotland/Wales
- Been before and not enough to do to warrant return / negative experience when here

Key messages

- Off the beaten track experiences to discover
- Quality food & drink on offer
- Unique and rare wildlife of distinction
- Affordable adventure
- Range of activities to enjoy, with lots to explore of our great outdoors

Audience Profiles



'Work hard, Play Hard'

(Approx. 10m in the UK)

"The largest segment, taking in the widest age range, are young, free and (sometimes) single. With busy lifestyles climbing the career ladder, these urban dwellers work hard and play hard. Weekends and holidays are reserved for a break from the grind. Ambitious and independent these 20 – 40 something year olds are up for anything."



'2.4. Explorers'

(Approx. 4.6m in the UK)

"Quality time is family time for 2.4. Explorers. The most wide-ranging segment in ages and demographics, the group is bound by a focus on spending time together as a unit. Parents are busy, so holidays are for a break from routine. 2.4. Explorers enjoy broadening their children's horizons whilst making treasured memories."

Who they are

The largest audience segment, Work Hard, Play Hards tend to be mid 20s to 40 somethings. This group are childfree singles & unconstrained couples. They are educated to degree level, ambitious hard workers that have made it to at least mid, if not high-career level. Due to this, they work long hours and place high value on weekends and free time.

How they holiday

On holiday, Work Hard Play Hards are looking for new and different experiences to reinvigorate and re-energise themselves. They will spend their hard-earned money on multiple trips per year to recharge their batteries. When they are there they want to be exhilarated, enjoying adventure activities such cycling, hiking, and walking and are happy to try new activities.

- Multiple holidays per year, overseas and in the UK
- Take a mix of short breaks and longer holiday

Barriers to visiting

- Lack of awareness of what's here
- Too close to home
- Not much to do

Key messages

- Get active when getting away from it all
- Challenge yourself in beautiful natural surroundings
- Feel alive!
- You don't have to go far to try something new
- Make yourself at home, live like a local

Who they are

2.4. Explorers are the least homogeneous segment mostly due to the ages of children. This has an impact on their motivations and activities. Families with younger children focus more on the needs and want of the children, but for those with older children that focus is reduced. The needs of the family as a whole are priority.

How they holiday

2.4. Explorers are generally busy working families so holiday time is precious. They are looking for an escape from routine, to relax and explore. On holiday, they go for soft adventure, history and culture.

- Multiple trip per year including one main holiday
- Short breaks (mid-term) 2 weeks+ as main trip

Barriers to visiting

- Lack of family-friendly accommodation and eateries
- Lack of 'things to do' in the rain
- Not considered as a holiday destination before
- Ease of access
- Risk averse

Key messages

- Lots to do; mix of outdoor & heritage attractions
- Make memories together against our spectacular natural backdrop
- Exercise children's imaginations while learning about our history & wildlife
- Getting to the island is the start of your holiday adventure
- From glamping to family hotels, choose your base camp from a wide range on offer"

TARGET MARKETING CAMPAIGNS

Targeting the priority markets will require individual campaign plans that reflect their specific motivations, aspirations and behaviours in terms of how they make holiday/ short break choices. These plans will set out appropriate and effective routes to market both on and offline and be a catalyst for public and private sector marketing resources to be pooled for maximum impact.

In particular, these plans need to draw together and align the marketing resources of the Government's tourism team with those of the airlines and Isle of Man Steam Packet Company.

As part of this, themed seasonal campaigns and promotions will be introduced to provide a focus for PR and related activities, target particular market niches and help refresh interest. These will capitalise on some particular event or inherent strength of the Isle of Man. Campaigns will be developed as they provide a proven and cost effective tool for exposing different aspects of the destination and useful hooks for PR. The emphasis will be placed on initiating a minimum of one new campaign each year. The campaigns will be supported by an integrated programme of digital-marketing, print, PR activity, promotional offers and events.

KEY ACTIONS FOR TARGETING NEW GROWTH MARKETS: 2016 – 2020

- Create campaign plans for each of the priority market segments involving all interested parties
- Develop a 'Marketing Toolkit' for businesses that informs them about the target markets, empowers their own marketing and aligns it with the overall strategy for the Isle of Man.
- With key partners, develop and plan a rolling programme of major regional and national themed seasonal campaigns supported with an integrated programme of PR support activities.





► Marketing the destination

Market research indicates that the Isle of Man has a relatively strong and consistent brand amongst current visitor markets with many positive associations and connotations. However, the research also indicates that amongst potential UK growth markets, the Island suffers from some negative perceptions and low awareness.

The result is that the Isle of Man is not 'on the radar' as a possible destination in the UK for many considering a short break or longer stay holiday.

Developing and projecting a stronger brand identity for the Isle of Man is crucial to creating an impact in the marketplace. This is about defining the distinctive essence of the Island that differentiates it from other places, and embracing this in all communications. A brand agency will be commissioned to advise how to develop and incorporate a new brand identity into destination marketing activity. This will underpin all marketing and the tourism sector

will be encouraged to incorporate elements of branding in their own communications.

The Isle of Man's brand needs to be truthful and lasting. It also needs to be capable of connecting to target markets in a way that compels them to visit. A brand is a story that captures the essence of the place and what makes it special. It's a story that will be reinforced over time if it is embraced and used by everyone involved in tourism in the way they talk about and write about the Isle of Man.

Creating the 'Brand' is about a 'Shared Story of the Isle of Man'.

KEY ACTIONS FOR MARKETING THE DESTINATION: 2016 – 2020

- Develop a consistent, strategically co-ordinated destination branding programme in partnership with other Island stakeholders
- Roll out the brand across all marketing activity and use brand guidelines to assist the tourism sector to embrace the brand identity in their communication
- Create a shared story for the Isle of Man as part of this which will be set out in a 'Marketing Toolkit' for operators
- Establish and maintain an image library for internal use and by third parties to project a fresher and more appealing image of the destination.

► Multi-platform promotion and marketing

In order to promote the Isle of Man as a destination to new target markets we must use a comprehensive and consistent approach and message system across all advertising and marketing platforms.

ONLINE MARKETING

Online marketing is now the dominant marketing tool for any destination.

The current Visit Isle of Man website operated by the Government attracted over 1 million visits in 2014.

The proposal is to redevelop and redesign the Visit Isle of Man website with a content management system which provides greater functionality and potential

for interaction. The new website will be driven by a Destination Management System (DMS) which is essentially a database that will underpin information management across all of the destination's activities.

The upgraded website will also provide income potential through advertising opportunities, online booking and retail activity.

Maintaining and developing the website, and keeping pace with new developments, will be an on-going process that will be central to marketing the destination to prospective visitors and in providing visitor information.

KEY ACTIONS FOR ONLINE MARKETING: 2016 – 2020

- Redevelop and redesign the Visit Isle of Man website with an enhanced content management system.
- Manage and add content to the website and optimise visibility on search engines.
- Develop new areas to present the richness and diversity of the Isle of Man product including downloadable maps and guides to help visitors once they arrive.
- Increase opportunities for developing digital marketing activities through social networking sites, user generated content, SMS etc.

PRINT

Despite the dominance of the internet, there is still a need for printed material both to distribute outside the Isle of Man and for use within the destination.

The Government's Tourism Team currently produces and distributes a limited range of print comprising an accommodation guide, map, group travel guide and various leaflets.

Print is distributed via the Welcome Centre and the local network of TICs.

Print provision will be assessed and new opportunities identified and evaluated. The intention is also to seek opportunities to widen the distribution of publications via online and offline channels.

KEY ACTIONS FOR PRINT MARKETING: 2016 – 2020

- Maintain and develop the existing publications but review the need for them on a regular basis.
- Aim to make all publications cost effective by seeking advertising and/or partner support.
- Review the current availability of publications and produce downloadable information - where possible.
- Proactively manage and monitor print runs, costs and improve distribution.
- Assess the need and opportunity to develop new publications. For example, a conference and venues brochure.

PR ACTIVITY

Ensuring the Isle of Man is covered in press and other media is an essential part of the destination's marketing activity and will underpin main and seasonal campaigns.

Editorial exposure through entertainment and news media and third party recommendations are cheaper and very much more persuasive than paid-for advertising. Current activity includes press releases, arranging visits from journalists and contact with travel press.

This will be a priority for the destination with emphasis being placed in future on adopting a more focused approach to PR. It will involve continuing to work closely with PR partners, in identifying and targeting specific media with tailored press releases and developing relationships with selected journalists to generate broader coverage of the Isle of Man as a visitor destination.

KEY ACTIONS FOR PR ACTIVITY: 2016 – 2020

- Continue to generate positive press coverage about the destination and assist journalists with producing articles.
- Work closely with partners and businesses to generate unique, authentic and quirky ideas and material to generate coverage with domestic media.
- Work closely with Visit Britain and to generate coverage with overseas media.
- Seek editorial coverage in 'inflight' magazines and work more closely with the airlines and the Steam Packet on PR opportunities.

► Building marketing partnerships

There is a multitude of interested parties engaged in marketing the destination of the Isle of Man – much of it in isolation. Operating in a highly competitive market with limited resources suggests that close partnership working needs to be at the heart of the DMP's marketing strategy.

Any barriers need to be broken down to create new ways of working that allow the Government, the industry, carriers (including the Steam Packet Company, Flybe, Easy jet and Citywing) and any other agencies engaged in the promotion of the Island, to collaborate and pool resources behind joint campaigns. In any overseas marketing this means close partnership with Visit Britain and potentially other destinations where there is mutual benefit.

KEY ACTIONS FOR BUILDING MARKETING PARTNERSHIPS: 2016 – 2020

- Develop new, stronger partnerships to develop the Isle of Man's marketing plans and ensure that all available resources are pooled behind them.

Visitor Experience

OBJECTIVE: Work with industry partners to ensure that the tourism offering continues to improve and grow, giving visitors a high quality and memorable experience.

Providing an exceptional visitor experience that creates lasting memories and compels visitors to return and recommend to others.

The Isle of Man needs to recognise the ever changing behaviour of visitors and the increasing sophistication of the market as people travel more frequently and much further afield than ever before.

Visitors are looking for a memorable experience and are demanding more in terms of quality and value for money.

In order to remain competitive, businesses in the Isle of Man need to be more focussed on the customer and the ability to satisfy their needs will be crucial in maintaining and developing the tourism and visitor economy.

We have outlined **six focus areas** to achieve the strategic objective of providing an exceptional visitor experience.



DEVELOPMENT OF EVENTS

Events and festivals are an important component of the visitor experience providing reasons to visit, generating additional bednights and visitor spend, giving character and personality to a place and providing the opportunity to interact with its culture.

Events create opportunities to raise the profile of the destination with new markets and position the Isle of Man more strongly in the UK and international marketplace.

The Island has an enviable reputation in its ability to host large, high quality international events, evidenced by the Isle of Man TT races.

KEY ACTIONS FOR DEVELOPMENT OF EVENTS: 2016 – 2020

- Conduct a detailed review of the current events portfolio supported by Government to check that key benefits are being delivered cost effectively and appeal to the key target markets
- Investigate the potential in creating or attracting major cultural and sport 'signature events' that raise the profile of the destination and generate significant visits
- Work closely with key event and festival organisers in maximising their profile and developing the economic impact
- Put into place a programme of ongoing research that evaluates the economic and social impact of supported events

ENCOURAGING QUALITY

Quality is the key driver of success for specific products, services and destinations with consumer expectations are at a higher level than ever before. Expectations not just in relation to the quality and service but also, more importantly they relate to value for money.

Visitors expect and demand quality in all aspects of their experience and due to growth in the use of social media and customer review websites, are increasingly vocal when they experience poor quality and service.

In order to remain competitive the quality of the visitor economy must continue to be enhanced through the promotion of quality assurance schemes including grading of visitor accommodation and the 'Taste' scheme for restaurants and eating out establishments; and the promotion of award winning businesses.

KEY ACTIONS TO ENCOURAGE QUALITY: 2016-2020

- Promote the improvement to quality and service levels by championing beacon businesses and promoting the awards, accolades and quality assurance schemes available
- Grow and diversify the Taste and Harvest schemes to further develop the quality of eating out on the Island and promote local produce
- Encourage the improvement and investment in the product and supporting it through DED schemes and initiatives
- Provide support to businesses in adapting to attracting new growth markets and adopting to a 'customer driven' approach
- Encourage the engagement with digital marketing, social media and online booking channels

BUSINESS DEVELOPMENT

A proactive and supportive approach to business development is key to the success of our Visitor Economy.

In recent years there have been significant changes in consumer behaviour, not least with the rise in the use of technology as an aid in both researching and booking a holiday or short break. The use of social media and traveller review sites has become part of everyday life and with insight and understanding can be used as effective business marketing tools.

The visitor economy on the Island is dominated by small and medium sized enterprises and most will require consultation to identify training needs and assistance with the provision of effective solutions.

In addition to digital marketing training, accessibility awareness and customer service training have been highlighted as future priorities going forward. To deliver this objective the development of effective partnerships with tourism trade and industry bodies will be vital.

KEY ACTIONS FOR BUSINESS DEVELOPMENT: 2016 – 2020

- Develop a rolling programme of digital marketing training and support
- Market research to establish current available accommodation stock seasonality
- Encourage partnership working to increase volume by addressing seasonality issues
- Facilitating accessibility training in anticipation of an Island equivalent of the UK Equality Act
- Consultation to support development and improvement of required products identified within the DMP
- Support and development of beacon business

NEW BUSINESS SUPPORT

As a destination the Isle of Man needs to provide a diverse range of quality visitor experiences, enhancing the profile of things to see and do. This creates a positive impression on visitors arriving on the Island adding to the 'feel good factor' and the perception that the Island has a wealth of activities and attractions to offer.

Gaps in the current product and service offering must be identified and development needs established in order for the need to be met. The business support schemes available must be actively promoted via an effective and proactive business advisory service and new business 'hub' on the trade website.

KEY ACTIONS FOR BUSINESS SUPPORT: 2016 – 2020

- Actively promoting the Department of Economic Development (DED) schemes and initiatives to businesses which support the aims and objectives of the DMP
- Providing a comprehensive New Business Advisory Service
- Liaison with other Government Departments and external stakeholders to ensure all regulatory requirements are met
- Working with Government colleagues to provide, where appropriate, support for Planning and DED's Financial Assistance Scheme applications

SKILLS TRAINING

Skills training is important to delivering quality assurance in every aspect of the visitor experience, and businesses should be encouraged to take up the challenge of delivering that. The Isle of Man therefore needs to ensure it has a workforce able and keen to take up new job opportunities and that jobs are available to all.

KEY ACTIONS FOR SKILLS TRAINING: 2016 – 2020

- Build relationships with businesses and training providers in order to identify sustainable employment opportunities for local people and assist with the development of a skilled workforce
- Develop a specific action plan for the visitor economy that identifies skill needs and the strategic response needed from training providers
- Provide customised support to tourism SMEs, in particular how to make best use of digital marketing
- Support and encourage employers to offer high quality apprenticeship opportunities

IMPROVING VISITOR SERVICES

This section is about improving direct contact with visitors, both by responding to enquiries (face-to-face, telephone and email), and by creating opportunities for making bookings and sales for tourism businesses.

Visitor services on the Isle of Man are centred within the Welcome Centre at the Sea Terminal in Douglas and provided at various accommodation, local authority and attractions sites across the Island.

A recent review conducted by the Department of Economic Development identified the need to improve and better co-ordinate the provision of services to visitors. The squeeze on public finances has forced many UK destinations to adopt explore and adopt other approaches to face to face visitor information provision. These may suggest ways that provision can be improved on the Isle of Man.

KEY ACTIONS FOR IMPROVING: VISITOR SERVICES: 2016 – 2020

- Review approaches being taken to information provision in other destinations and their potential relevance to the Isle of Man
- Work with the Welcome Centre, local authorities, accommodation providers and attraction operators in coordinating and improving the provision of information services to visitors across the Island.
- Work to improve the gathering and distribution leaflets, guides and 'what's on' information to the local media and key venues across the Island.



Product Development

OBJECTIVE: Develop and create new products and experiences that the defined target markets will enjoy at different times of the year. This will help to achieve growth in the market areas as well as achieve a longer tourism season.

There is a growing interest and demand around the world for all forms of tourism product that promote the anti-stress experience of rest, relaxation and mental regeneration.

Growing numbers of visitors seek opportunities to unwind and feel a different pace of life with their families, partners and friends, while also seeking new physical challenges and heritage and cultural experiences that provide enjoyment and fulfilment.

The Isle of Man possesses the heritage, cultural and natural environmental assets that large numbers of prospective visitors seek. But the Isle of Man is not unique as most Islands can claim very similar assets.

To turn potential into actual demand will require Government and local authorities to invest in destination management and development, and individual businesses to engage in a cycle of continuous improvement and investment.

In line with market needs and opportunities we will look to create a positive environment for investment and reinvestment in product development

MORE GLAMPING TO TARGET FAMILY MARKET



KEY ACTIONS FOR IMPROVING VISITOR SERVICES: 2016 – 2020

- Conduct an Accommodation Strategy to identify and direct current and future development of serviced and non-serviced accommodation
- Work with Department of Infrastructure to review and assess the need for the development of a deep water berth for cruise ships and commercial marinas
- Work the Department of Environment, Food and Agriculture (DEFA) identify and assess suitable sites for the development of family orientated holiday centres
- Work with industry and carriers to extend the season, focusing initially on March and October
- Work with Manx National Heritage (MNH), DEFA and others in identifying the need and opportunity in improving and reinvesting in the heritage and cultural offer

Research & Intelligence

OBJECTIVE: To ensure the continued development of products and markets is supported by comprehensive research to ensure maximum effectiveness of the strategic objectives.

Successful destination planning requires sound data. There is a clear need to develop a portfolio of research which can help inform destination planning on an on-going basis.

We need to focus on creating and maintaining a strong programme of market intelligence gathering on which to base strategy and measure achievement.

Some of this research will be required for monitoring performance, but there are a number of other market specific research tasks. There will be a need to assess requirements on an annual basis and to inform new initiatives.

KEY ACTIONS FOR RESEARCH AND INTELLIGENCE: 2016 – 2020

- Review and improve the annual passenger survey and the means of measuring the economic and social impact of tourism
- Develop a destination performance system (T Stats) and communicate research findings to industry, media and key stakeholders on a quarterly basis
- Relate all market research to target markets, including the analysis of enquirers and bookers
- Undertake a comprehensive assessment of the economic importance of tourism on the Island
- Develop annual customer satisfaction surveys covering both product and the visitor experience



The table below sets out the primary and secondary markets and identifies product needs for further assessment and development

PRIMARY SEGMENTS	PRODUCTS - WHAT NEEDS TO BE DEVELOPED
UK FAMILIES LONG & SHORT HOLIDAYS	<ul style="list-style-type: none"> Family holiday centres providing flexible accommodation & a range of on-site leisure & entertainment facilities Family friendly accommodation both serviced and self-catering Accommodation suitable for multi-generational holidays Variety of wet weather family orientated attractions Varied value for money restaurants & cafes Programme of children's entertainment & activity across the Island Easy to use, accessible, comprehensive and affordable public transport network Affordable car-hire with family friendly vehicles e.g. SUV's, people-carriers Affordable fast 3G/4G and voice connectivity for visitors
SHORT BREAKS (SINGLES & COUPLES)	<ul style="list-style-type: none"> Sea front café culture & quality public realm Quality restaurant provision New major attractions e.g. art gallery offering local and visiting exhibitions, new TT Attraction Cultural events Commercial marina development Affordable fast 3G/4G and voice connectivity for visitors Easy to use, accessible, comprehensive and affordable public transport network
ADDITIONAL NICHE SEGMENTS	PRODUCTS - WHAT NEEDS TO BE DEVELOPED
CRUISE PASSENGERS	<ul style="list-style-type: none"> Luxury transfer buses Themed/vintage transport buses Exclusive experiential attractions that create lasting memory within the cruise Exclusive Manx experience, TT Trike Tour, Speak on Tynwald Hill, Manx cat Multi-lingual Manx Ambassadors

ADDITIONAL NICHE SEGMENTS	PRODUCTS - WHAT NEEDS TO BE DEVELOPED
MOTOR SPORT	<ul style="list-style-type: none"> ■ All-year-round TT attraction ■ Coordination between TT and other motorsport themed attractions ■ Sufficient capacity on TT Trike Tours to meet peak demand ■ Widening of TT brand across other TT themed events
WALKING	<ul style="list-style-type: none"> ■ Varied routes & tours for all ages & levels of experience ■ A range of well signposted and maintained paths ■ Welcome Walkers scheme widely adopted by serviced and self-catering operators
SPECIALIST CYCLING	<ul style="list-style-type: none"> ■ Cycle centre offering hospitality, sales & rentals, varied routes for all ages & levels of experience ■ Quality on and off road routes/paths that are well signposted ■ Welcome Cyclists scheme widely adopted by serviced and self-catering operators
SPECIAL INTEREST HERITAGE (MUSEUMS & RAILWAYS)	<ul style="list-style-type: none"> ■ Development/greater promotion of the Go Explorer and Go Explorer Heritage pass ■ World Heritage status for Manx Heritage Transport infrastructure ■ Development of Manx National Heritage (MNH) product in line with current heritage attraction trends ■ Attract international standard travelling exhibitions to the Island
SPECIAL INTEREST/ACTIVE OTHER	<ul style="list-style-type: none"> ■ As applicable to individual special interest segment
UK COACH GROUPS	<ul style="list-style-type: none"> ■ Additional quality island-based coach capacity to support air inbound groups ■ Additional coach capacity on Steam Packet Company to match tour operator demand ■ Relaxation on restrictions on keeping UK coaches on-Island during peak season

ADDITIONAL NICHE SEGMENTS	PRODUCTS - WHAT NEEDS TO BE DEVELOPED
MEETINGS, INCENTIVES, CONFERENCING AND EXHIBITIONS (MICE)	<ul style="list-style-type: none"> ■ Need for International branded MICE accommodation ■ Quality restaurants – in hotel and throughout the destination ■ Business in room facilities e.g. Wi-Fi ■ Space for smaller meetings ■ Leisure facilities - spa, gym & pool ■ New major attractions e.g. art gallery offering local and visiting exhibitions, TT Attraction ■ Wrap-around quality retail, food & beverage offer nearby to MICE venue ■ Affordable fast 3G/4G and voice connectivity for visitors
MARINE TOURISM	<ul style="list-style-type: none"> ■ Sufficient capacity and variety of visitor berths across all key Island marinas ■ Extensive easy to access Island and marina information available online 24/7 ■ Information updated daily with weather and berth availability, multi-lingual ■ Online, phone and radio pre-booking system for visitor berths ■ Easy, reliable payment system for marina access and facilities ■ Friendly, well-trained marina staff available when required ■ Series of Island races, regattas and events to attract off-Island sailors ■ Retail shops, Food & Beverage outlets open when visitors expect them to be ■ Good range of support trades such as engineers and chandlery stores ■ Affordable fast 3G/4G and voice connectivity for visitors ■ Isle of Man appearing on leisure sailor must-visit lists
CORE MARKETS TO STABILISE	PRODUCTS - WHAT NEEDS TO BE DEVELOPED
RESIDENTS	<ul style="list-style-type: none"> ■ Maintaining and refreshing Island attractions to encourage repeat visitors ■ Programme of events to attract repeat visitors ■ Annual free open weekend for residents to remind them of what is available ■ Residents only discounts and special incentives outside peak season

CORE MARKETS TO STABILISE	PRODUCTS - WHAT NEEDS TO BE DEVELOPED
RESIDENTS	<ul style="list-style-type: none"> ■ Visiting exhibitions from UK and abroad to attract local residents ■ Off-peak residents packages to encourage overnight stay and increased spend
BUSINESS VISITORS	<ul style="list-style-type: none"> ■ Business sector retention role, minimise loss of current sectors ■ Promotion of new air routes to Island ■ Promotion of benefits of face-to-face business contact
OVERSEAS VISITORS	<p><i>As per short-breaks +</i></p> <ul style="list-style-type: none"> ■ Multi-lingual staff within key attractions, accommodation and food & beverage ■ Multi-lingual websites or links to Google Translate functionality ■ Key European translations on main tourism publications ■ Affordable fast 3G/4G and voice connectivity for visitors ■ Ease of onward travel to Isle of Man promoted at key UK inbound airports also serving Isle of Man ■ Ease of onward travel to Isle of Man promoted at Liverpool, Belfast and Dublin ■ Building relationships with key inbound travel operators ■ Development of overseas ancestral tourism offer and Celtic and Viking connections
VISITING FRIENDS AND RELATIVES (VFR)	<ul style="list-style-type: none"> ■ Promotion of off-season serviced and self-catering accommodation for inbound VFR visitors



“

If you build a place people want to visit,
you build a place where people want to live.

If you build a place where people want to live,
you'll build a place where people want to work.

If you build a place where people want to work,
you'll build a place where business has to be.

And if you build a place where business has to be,
you'll build a place where people have to visit.

International Destination Marketing Association

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