

Our Island, Our Future

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**Isle of Man
Visitor Economy
Strategy 2022-2032**

VISIT
ISLE OF MAN





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Minister's Foreword

Hon Alexander Allinson MHK
Minister for Enterprise



The Isle of Man is home to an extraordinary offering for visitors, from our rich heritage and distinct cultural identity, to our ever-changing landscapes. All of which contribute to our UNESCO Biosphere Reserve status – the only entire nation in the world to be awarded this special accolade.

Isle of Man Government's *Our Island Plan* and the emerging 5-10 year economic strategy for the Island both clearly recognise the role that Visitor Economy growth has to play in achieving the vision of a secure, vibrant and sustainable future for the Isle of Man.

Our Island, Our Future outlines the strategic plan for growing the Island's Visitor Economy over the next 10 years through to 2032. It has been developed by the Visit Agency ('Visit Isle of Man') in partnership with the Island's Visitor Economy sector and partner government departments, agencies and organisations. It is through improving the quality of the destination that the quality of life for our residents will improve too, and it is this association that makes the Isle of Man the natural choice to live, work and visit.

The strategy is the culmination of a comprehensive programme of market research and consultancy studies, which have consistently shown great potential for growth in the Island's Visitor Economy. It outlines a clear way forward for fully capitalising on all of these opportunities, and provides the context and mandate for the work of Visit Isle of Man and the starting point for business cases for Government

policy and investment support. It is designed to complement and inform the strategies, policies and ambitions of all partner government departments, agencies and bodies, and support the future prosperity of the Island's existing and new Visitor Economy businesses.

Our Island, Our Future sets out an ambitious but achievable vision and targets for growth, and is firmly focused on the development of a more compelling and competitive visitor offer that will raise awareness of the Isle of Man as a visitor destination. In turn, this will attract new visitor markets, boost the performance of Visitor Economy businesses, and create rewarding career opportunities to retain and attract talent in our tourism industry. All whilst contributing positively to reducing the impacts of climate change.

Alongside the evidence that market research and consultancy studies have shown, I firmly believe that the Isle of Man has the potential to grow strongly through to 2032. Combined with a strong set of unique selling points, we have a loyal existing customer base that can be encouraged to visit more frequently and out of season, and a clear potential to grow demand from the pre-family and family holiday and short break markets. The next ten years are going to prove vitally important for Visit Isle of Man as we implement the core principles and action programmes required to grow our annual visitor numbers to 500,000 by 2032.



Our Importance

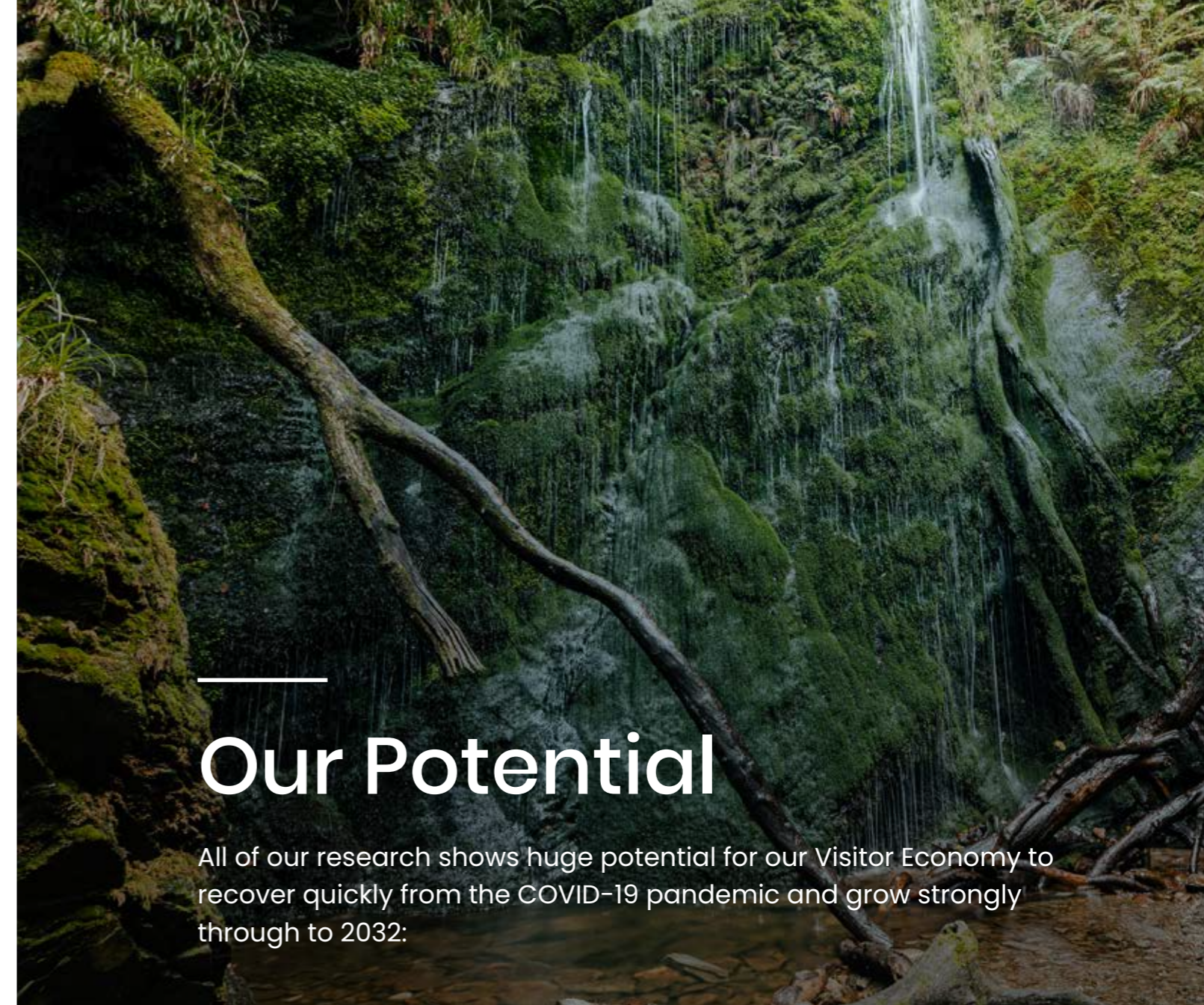
The Isle of Man's Visitor Economy plays a fundamental role in Island life. In 2019, we welcomed almost 330,000 visitors who spent around £142m during their stay and journey to and from the Island. Visitor spending provides income for, and supports employment in, the Island's accommodation, retail, hospitality, attractions, transport and entertainment sectors, and considerable supply chain benefit from the on-spending of this money by these businesses and visitor sector workers.



The Visitor Economy is vital to the Island in terms of:

- Maintaining and improving our air and sea links;
- Widening leisure opportunities for our resident population;
- Enhancing the Isle of Man as a place to invest, work, live and relocate to;
- Supporting the growth of other sectors of the economy;
- Generating Exchequer benefit for the Government.

Well managed, sustainable visitor discovery and enjoyment of the Island's seas, coastline and countryside can also make a positive contribution to the conservation goals of UNESCO Biosphere Isle of Man. Redesigning the Island's visitor industry to eliminate its carbon footprint has a key contribution to make to the Island's Climate Change Plan.



Our Potential

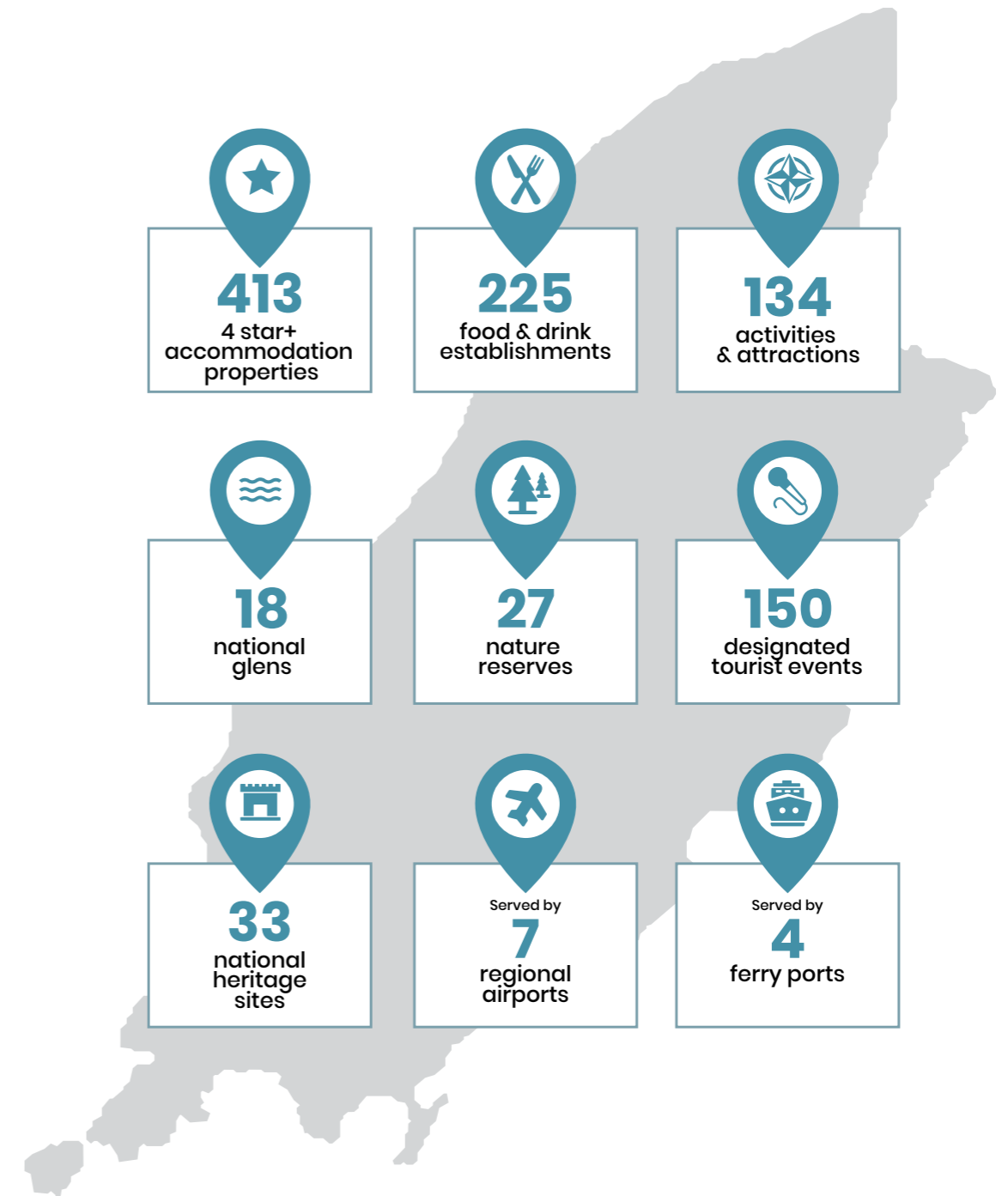
All of our research shows huge potential for our Visitor Economy to recover quickly from the COVID-19 pandemic and grow strongly through to 2032:

- We have a loyal existing customer base that can be encouraged to visit more frequently and out of season;
- We have a potential target holiday and short break visitor market of over 11 million people living in the UK and Ireland;
- We have clear potential to grow demand from the pre-family and family holiday and short break markets;
- The introduction of the new Manxman ferry in 2023 and opening of the new Liverpool ferry terminal will enhance and increase our ferry travel capacity;
- There is scope for us to grow our group travel market, particularly out of season.

Our USPs



Our Assets





“Our accommodation occupancy and passenger arrivals data show that we are a highly seasonal destination.”

Our Challenges

We have a number of challenges to overcome:

- The Island is significantly underperforming as a holiday and short break destination, attracting only 56,500 visitors for these purposes in 2019, representing a market penetration rate of just 0.5%;
- Our market research shows that the cost of travel to the Island is perceived as a barrier for a significant proportion of our target holiday and short break visitors;
- Our accommodation occupancy and passenger arrivals data show that we are a highly seasonal destination. Reduced winter transport links exacerbate our seasonality;
- Our visitor accommodation offer is lagging behind our competitor destinations in terms of quality, choice and innovation. The seasonality of our visitor market makes it difficult to secure the commercial investment and lending that is needed to address this situation;
- We are not making the most of many of our key USPs – our seas, our coastline, our countryside, our heritage, culture and arts, and our food and drink;
- Our Visitor Economy industry has been significantly weakened by the COVID-19 pandemic, leaving the Island falling even further behind competitor UK and Irish destinations;
- We face difficulties in recruiting staff to work in our Visitor Economy businesses and ensuring that they have the right level of skills to deliver the memorable experiences that our visitors are looking for.

Our Targets

Our headline targets are to grow our annual visitor numbers to 500,000 by 2032 and increase the annual economic contribution of the Island’s Visitor Economy to £520m. This will mean attracting an additional 170,500 visitors per year compared to 2019. We aim to triple our holiday and short break market as well as grow all of our other visitor markets. Combined with an expected increase in average spending per visitor, driven by strong growth in longer staying and higher spending leisure markets, these visitor numbers should result in a more than doubling of annual visitor spending on the Island to £310m, which will support an increase in Visitor Economy jobs to 5,000 and generate an annual Exchequer benefit of £49m.



These targets are based on the findings of our market research, comparisons with competitor British Island destinations, and annual growth projections. Given this robust basis, the targets are a sound indication of the Visitor Economy growth that can be achieved on the Island over the next 10 years.

Progress towards achieving these targets will be tracked through waypoint targets that will be monitored from 2022 through the Island’s annual Passenger Survey, a new Visitor Survey, and periodic economic impact modelling exercises.

“We aim to triple our holiday and short break market and grow all of our other visitor markets.”

¹ The detailed analysis and projections that provide the basis for the Visitor Economy Strategy targets is set out in a separate report available from Visit Isle of Man



"Our ambition is to be a leading British eco-tourism destination."

Our Objectives

Our Island, Our Future has two key objectives for achieving Visitor Economy growth:

1
Getting Ahead of the Competition
 Through the development of a distinctive Manx visitor experience and the establishment of the Island as an eco-tourism destination that can be explored sustainably and offers dynamic ways for visitors to engage with our unique natural environment.

2
Extending the Season
 To improve the financial sustainability of existing and new Visitor Economy businesses through the development of a strong season between the February and October school half term holidays, and eventually to the Island becoming a year-round destination.

Our Principles

Our Island, Our Future is based on the following core principles that will guide how we grow our Visitor Economy:

Visitor First

To be successful as a visitor destination everything that we do must be driven by the needs and expectations of our visitors. We must be clear about:

- o Who we want to attract;
- o What they are looking for from their visit to the Island;
- o How we will deliver an experience for them that exceeds their expectations.

Environmental Sustainability

We must do everything in our power to ensure that the development of our Visitor Economy is environmentally sustainable, respects and enhances our seascape, coastline, countryside, nature, heritage, culture and communities, and contributes to reducing the impact of climate change on the Island. Our visitor industry must be firmly focused on eliminating its carbon footprint. Our ambition is to be a leading British eco-tourism destination that provides a range of opportunities for visitors to connect with our unique nature and wildlife.

Memorable Experiences

Holidays and short breaks are times when people make memories. We must ensure that the memories our visitors take away with them are positive and lasting, so that they will return and encourage others to come.

Financial Sustainability

We need to ensure that our visitor businesses are financially sustainable and able to continuously invest in maintaining and improving their quality, by extending the season and increasing visitor numbers.

Making the Most of Our USPs

As an Island destination with a fantastic seascape, coastline and landscape, UNESCO Biosphere designation, unique Manx heritage, culture and food, and international recognition as the home of the TT, we have many unique assets as a place to visit. There is so much more that we can do to make use of these USPs to help us stand out as a destination and get ahead of the competition.

In It for the Long-Term

This strategy is not about quick wins and easy successes. It is about recognising the need for sustained government and private sector investment in building a competitive visitor destination over time and taking it to market.

Our Target Markets

Our priority to 2032 will be to triple our holiday and short break demand. Over 70% (122,700) of our additional visitors will be staying with us for such purposes.

We will target four key UK and Irish holiday and short break markets:



Traditional Travellers

Our current core market of returning and regular visitors: emptynesters and retired couples that like to take things at a leisurely pace, want to take closer-to-home breaks, and come for our heritage and culture.



Curious Explorers

Emptynesters and older couples that like to take holidays off the beaten track and discover new places. They have a wide range of interests and enjoy heritage and culture, the outdoors and nature.



Experience Seekers

Pre-family couples and friends that love to socialise and try new things. They are very experience-led, want to escape to the country, and look for a balance between relaxation and active leisure time.



Family Adventurers

Families and extended families that want to spend quality time together on holiday. They are looking for play-focused attractions and activities for younger children and active, family-friendly outdoor pursuits for older children. Family-orientated accommodation that provides a safe and welcoming environment for children is important.

The core focus in the initial three years of the implementation of *Our Island, Our Future* will be on extending the season by targeting the Traditional Traveller and Curious Explorer markets. The potential for growth in the Experience Seekers and Family Adventurers markets will be more in the medium to long-term, once the visitor accommodation, attractions and activities products are more developed for these markets. Dog owners will be a key target for all holiday and short break markets.

We will also target growth in all of our other visitor markets:

- TT visitors
- Motorsports event visitors
- Other event visitors
- Group tours, including coach holidays, cultural and heritage groups, heritage transport tours, car clubs, motorbike tours, golf tours, walking groups, cycling groups, and bowling tours
- Ecotourists coming for nature and conservation holidays
- Visitors to friends and relatives
- Cruise stops
- Sailing visitors

We will additionally target Island staycationers to help boost out-of-season demand.





Our Action Programmes

Our Island, Our Future comprises seven Action Programmes covering:

- 1 Air & Sea Access Improvement
- 2 Quality Improvement
- 3 Visitor Accommodation Transformation
- 4 Visitor Product Development
- 5 Events Development
- 6 Market Development
- 7 Talent Development

Delivery will be instigated, co-ordinated and supported by Visit Isle of Man working in partnership with other delivery agencies, government departments, and the private sector. Measurable targets will be set for each of the Action Programmes and their constituent projects, with progress monitored through research and performance measurement surveys.

Programme 1: Air & Sea Access Improvement

Convenient, value for money and enjoyable air and sea travel to the Island is vital to achieving our targets for growth in visitor numbers. We need to ensure that getting across to the Isle of Man from the UK and Ireland is as easy as possible for our target visitor markets; position and package travel to the Island as part of the overall holiday experience; and enhance journeys to the Island to improve perceptions of their value for money.

The new Liverpool ferry terminal and Manxman ferry will improve ferry travel to the Island from 2023. The Air Services Strategy for the Island focuses on ensuring the viability of existing critical air routes, expanding regional connections, and developing new connections to international hub airports.

Objective

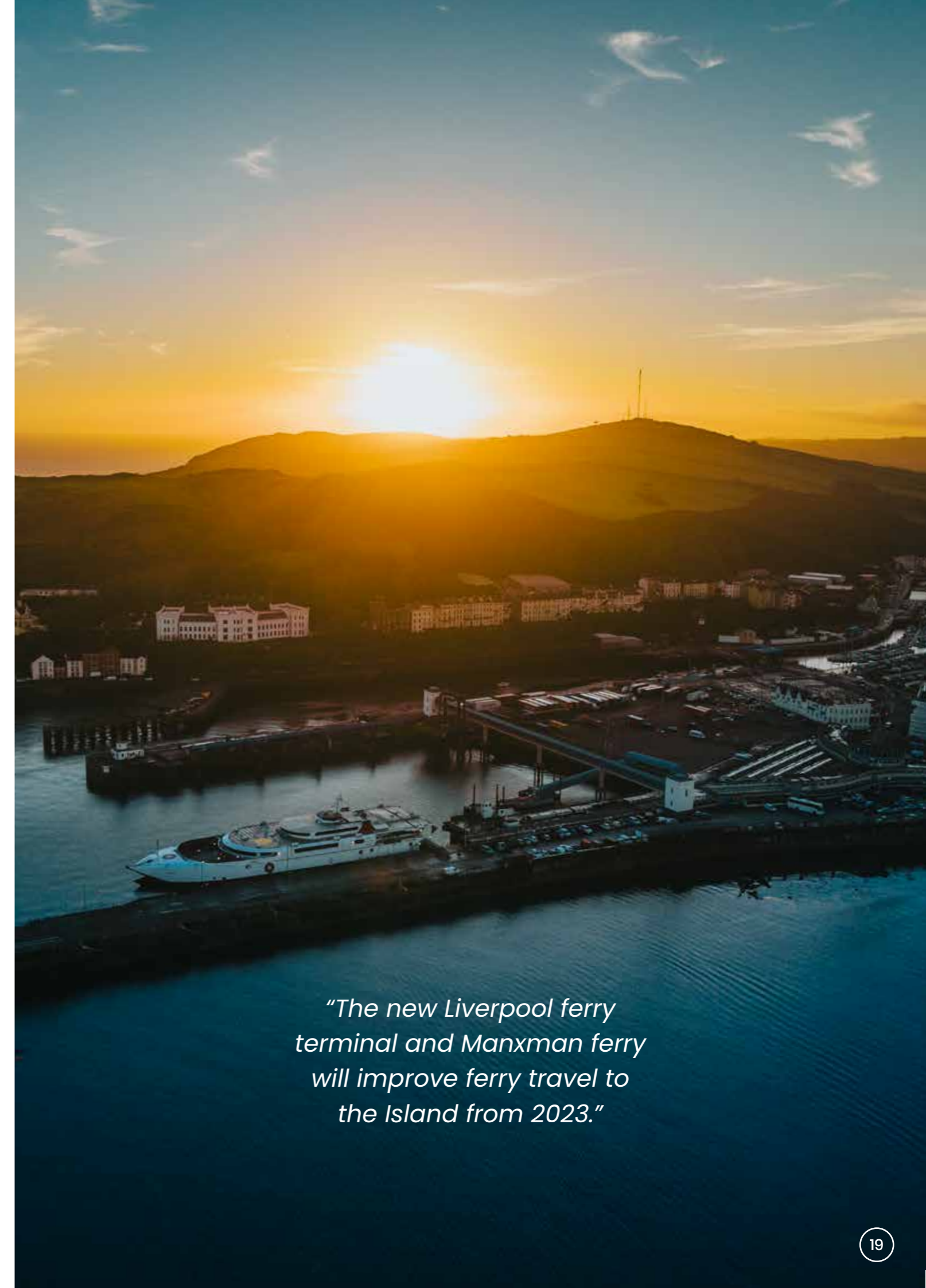
- Make access to the Island easy and enjoyable for our target UK and Irish visitor markets.

Key Results

- Increased passenger numbers;
- Improved yields for carriers;
- More positive visitor perceptions of travelling to the Island.

Actions

- IOMSPCo will continually look to improve its ferry services.
- Visit Isle of Man, IOMSPCo and the visitor industry will work together to:
 - Promote ferry travel as an environmentally sustainable option for travelling to the Isle of Man;
 - Develop and market ferry-inclusive packaged holidays to the Island.
- Visit Isle of Man, DfE and Ronaldsway Airport will work with airlines, UK and Irish regional airports and tour operators to promote existing air routes and increase frequency and capacity on them, and research, introduce and promote new scheduled and charter flights and packaged holidays to the Island as visitor demand grows.
- Visit Isle of Man, DOI and the Cabinet Office will work together to make improvements to visitor welcome at the Isle of Man Sea Terminal and Airport and signage to Isle of Man ferry terminals in the UK and Ireland.



“The new Liverpool ferry terminal and Manxman ferry will improve ferry travel to the Island from 2023.”



Programme 2: Quality Improvement

Visitor expectations in terms of quality and value for money are constantly rising and visitors are increasingly sharing their experiences through social media and online review sites. We must continually improve quality standards, service levels and quality assurance across our visitor industry to ensure that the Isle of Man delivers an exceptional experience for all of our visitors. Visit Isle of Man will lead a Quality Improvement Programme comprising a series of largely voluntary schemes designed to improve visitor welcome, quality assurance and visitor satisfaction; give visitor businesses a marketing edge; and boost visitor business performance:

Objectives

- Highly satisfied visitors;
- A visitor industry that is committed to continuous quality improvement and working towards eliminating its carbon footprint.

Key Results

- Improved visitor ratings of the Island;
- More repeat visitors.

Actions

- The re-introduction of the Manx Welcome customer care and product knowledge training programme for frontline staff in visitor businesses;
- A strengthened Accommodation Registration System to ensure that all visitor accommodation on the Island meets minimum standards and avoid reputation damaging poor quality provision;
- A revamped, guest-led voluntary Accommodation Grading Scheme linked to a package of accolades, awards, marketing, training and business support;
- Work with DEFA to implement its new Food Hygiene Rating Scheme in the serviced accommodation sector;
- The introduction of a Biosphere Green Visitor Business Charter to help our visitor businesses align with the sustainability objectives of the Isle of Man Biosphere and eliminate their carbon emissions;
- The introduction of a Quality Assurance Scheme for visitor attractions;
- The development of a business case for a Visitor Business Improvement Fund to provide easy to access financial assistance for quality, accessibility and sustainability improvements to visitor business premises;
- A Welcome All training programme to improve the welcome and service our visitors with disabilities receive;
- Proactive promotion of the Island's Accessible Accommodation Scheme to the visitor accommodation sector to improve quality assurance for visitors with mobility, sensory and cognitive impairments;
- Periodic visitor satisfaction surveys.



Programme 3: Visitor Accommodation Transformation

Our visitor accommodation studies² have shown that we are lagging behind our competitor island, coastal and rural destinations in terms of the quality and choice of visitor accommodation that we offer. We need to secure investment in distinctive, contemporary and eco-friendly visitor accommodation that will attract new visitor markets to the Island, help to boost off-peak demand, and enable the Island to get ahead of the competition.

We need to:

- Attract new modern serviced accommodation offers, such as coastal and harbourside boutique hotels, spa and thalassotherapy resorts and retreats, e-sports hotels, branded hotels, and contemporary pub rooms.
- Widen our non-serviced accommodation supply with the introduction of the innovative offers that are finding a strong market in competitor destinations, such as back-to-nature retreats, lifestyle and wellness resorts, sea cabins, treehouses, sky huts and luxury glamping sites.

Objective

- The development of 500 new and transformed hotel and serviced accommodation bedrooms and 500 new units of distinctive, contemporary eco-friendly non-serviced accommodation³

Key Results

- Growth in peak season visitor numbers driven by new accommodation;
- New off-peak demand generated by new accommodation;
- Higher average spending per visitor on accommodation.

Actions

- Visit Isle of Man will work with all of the relevant government departments and agencies to deliver a Visitor Accommodation Transformation Strategy that will include:
- The development of guidance to prospective visitor accommodation developers, investors and architects on the Island’s visitor accommodation transformation agenda;
 - Work to achieve a planning policy approach that can give positive consideration to proposals for well-designed, eco-friendly coastal and rural visitor accommodation, whilst protecting the natural environment and areas of high scenic value and avoiding any adverse climate change impact;
 - The investigation of options and opportunities for government investment in transformational visitor accommodation development projects;
 - Marketing activity to raise awareness of the visitor accommodation transformation agenda for the Island among land and property owners and Manx, UK, Irish and international property, hotel and visitor accommodation developers, investors and operators;
 - The compilation of a portfolio of deliverable visitor accommodation development sites that will attract strong developer, investor and operator interest, and be capable of achieving planning permission, given a well-designed scheme;
 - The progression of a series of Island-wide visitor accommodation development initiatives, including a cabin and bothies network around the Island to support the Raad Ny Foillan coastal path and round-island cycle, car, motorbike and kayak touring; a motorhome stopovers network around the Island; a pub accommodation development programme; a sky huts and star camps initiative; and the development of a distinctive Manx glamping offer.

² Isle of Man Hotel Futures, January 2016
 Isle of Man Non-Serviced Accommodation Futures, March 2017
³ Our visitor accommodation capacity modeling analysis (January 2021) showed a need for these levels of visitor accommodation development to achieve our target of 500,000 annual visitors by 2032



Programme 4: Visitor Product Development

Our visitor product research and strategies⁴ clearly show that we can make use of a lot more of our countryside; coastline; UNESCO Biosphere status; nature; wildlife; Manx heritage, culture and arts; food and drink specialities; and harbour towns to provide more distinctive and compelling visitor experiences that will set us apart from the competition.

Objective

- The development of a series of unique Manx visitor products that will entice more visitors to come to the Island throughout the year.

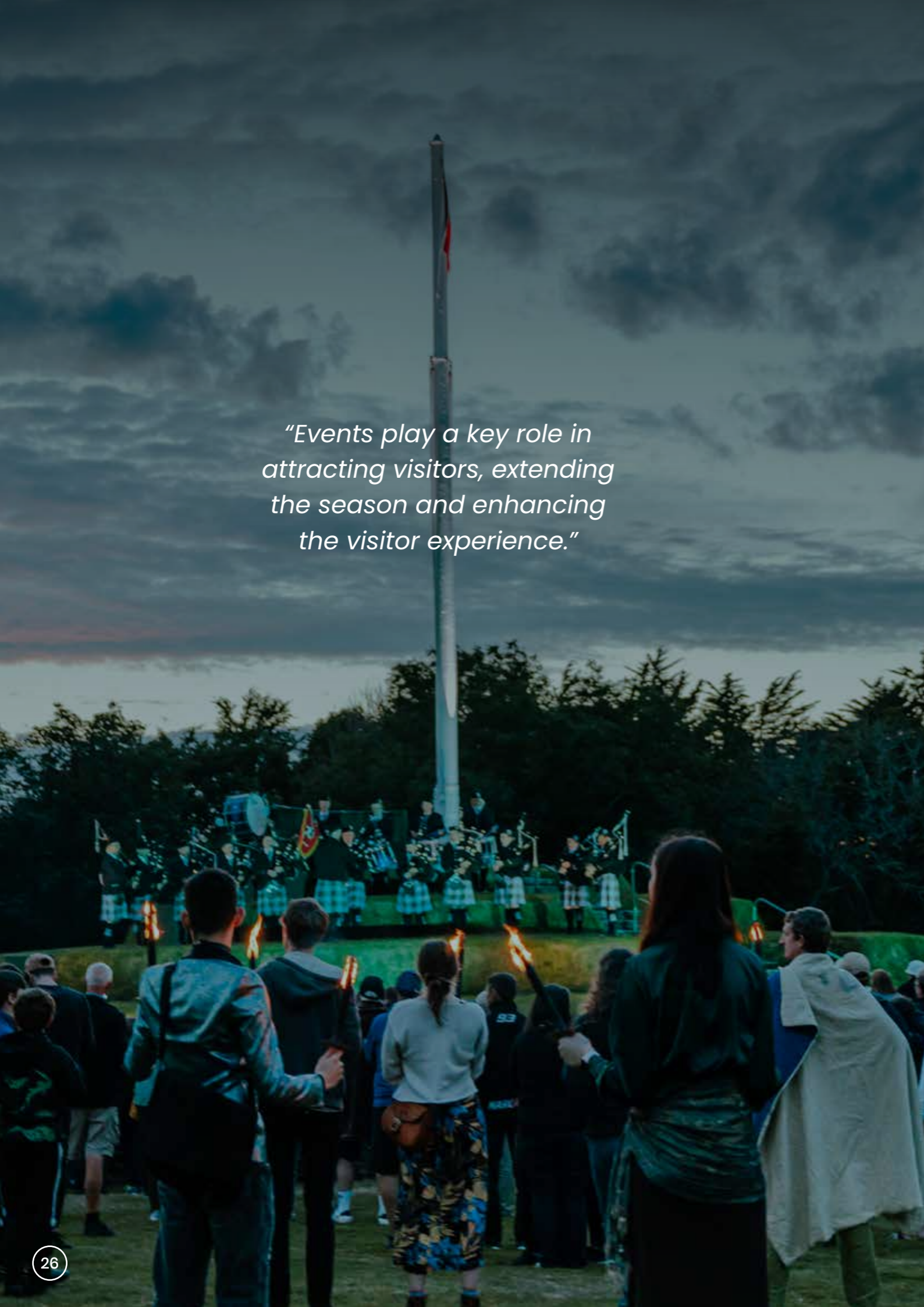
Key Results

- Stronger positioning of the Isle of Man as a visitor destination;
- New visitors coming for different reasons;
- High quality visitor experiences that deliver lasting memories;
- Greater recognition of the Isle of Man as an eco-tourism destination.

Actions

- This Action Programme will be progressed through the development and delivery of seven Product Development Programmes (PDPs) covering:
 - Walking
 - Cycling & Mountain Biking
 - Adventure & Sea Sports
 - Manx Heritage, Arts & Culture
 - Eco-Tourism (Nature & Wildlife Discovery)
 - Food & Drink
 - Harbour Towns & Marine Leisure
- Each PDP will include:
 - Market research and consultancy studies to fully understand the requirements for developing the product and inform PDP development;
 - Soft product development in terms of tours, trails, itineraries and packages;
 - Capital development projects, potentially including major projects subject to feasibility assessment and robust cases for government investment;
 - Targets and performance measures;
 - Funding business cases;
 - Delivery models.
- Each PDP will be progressed by a Task Force of relevant interested parties, supported by Visit Isle of Man.

⁴ Visitor Product Audit, December 2020
 'Our Landscape, Our Legacy' - DEFA Strategy for the Landscape and Amenity of the Isle of Man to 2050
 DOI Harbours Strategy, March 2018
 Biosphere Isle of Man Vision and Strategy 2021-2026
 Manx National Heritage Forward Development Plan 2021-23
 Isle of Man Arts Council/ Culture Vannin National Development Strategy for Culture and The Arts 2017-2027



“Events play a key role in attracting visitors, extending the season and enhancing the visitor experience.”

Programme 5: Events Development

Events play a key role in attracting visitors to the Island and enhancing the visitor experience that we offer, and have a vital role to play in helping to extend the season. Apart from the TT and Manx Grand Prix, there are a large number of small events on the Island organised by a wide range of organisations working independently or collaboratively. Visitor numbers to these events typically range between 100 and 500 and, with continued focus, they represent an ongoing opportunity for incremental, organic growth.

There could also be scope for a number of major new events attracting 1,000 – 3,000 visitors to be established or attracted to the Island. Such events would offer an instant uplift in visitor numbers and significant increase in awareness of the Island. The identification, acquisition and delivery of major events will require financial investment in respect of both securing rights and sourcing the necessary people skills.

Objectives

- Strengthen existing events to improve their impact, visitor experience and financial sustainability;
- Introduce viable new events, especially events that can help to extend the season.

Key Results

- Increased numbers of visitors coming for events;
- Growth in events-driven off-peak visitor demand.

Actions

- The implementation of the Strategic Plan for the TT to elevate it to a truly sustainable world-class event;
- Research to clearly establish the opportunities and priorities for events development on the Island to inform the forward Events Development Action Programme;
- The introduction of new events that capitalise on our USPs, especially where they can help to boost off-peak demand;
- The festivalisation of complementary events to attract longer stays;
- Professionalising events management and marketing by upskilling event organisers and/or supporting their outsourcing of these functions to suitable events management companies.

Programme 6: Market Development

Our visitor research⁵ shows that our target markets don't know enough about what we have to offer for a holiday or short break, or in some cases have an outdated view of the Island as a place to visit. A lack of packaged holidays is also a barrier for some. Effective marketing of the Island as a holiday and short break destination, and of visitor accommodation, attraction and activity businesses, events and packaged holidays will be critical to achieving our targeted growth in visitor numbers.

Objectives

- Increased awareness of the Isle of Man as a place to visit and holiday;
- Effective marketing partnerships between Visit Isle of Man, visitor businesses and the travel trade;
- More bookings and higher visitor spending.

Key Results

- A stronger digital presence;
- Increased traffic through social media channels;
- Greater numbers of subscribers to consumer databases;
- Increased engagement with the travel trade;
- More bookings through partnership marketing campaigns;
- More travel influencers and journalists recommending the Island.

Actions

- Through its marketing strategies, Visit Isle of Man will lead on strategic market development activity in terms of:
 - Market research and segmentation analysis;
 - Branding and image development;
 - Awareness raising PR, press and media work;
 - Off-peak campaigns;
 - Work with tour operators, carriers and travel agents to develop and promote packaged holidays to the Island;
 - Group travel marketing to develop productive working relationships with group travel operators and organisers;
 - Working with cruise operators to attract cruise stops;
 - Improving bookability and upselling;
 - The establishment of Celebrity Ambassador and Brand Partnership programmes;
 - Marketing evaluation and conversion research;
 - Supporting the upskilling of visitor businesses through:
 - > Marketing skills workshops and courses;
 - > Marketing grants to help visitor businesses to improve their marketing tools.
- Visitor businesses will need to develop their:
 - Online presence in terms of the content and presentation of their websites, photography and videography, and search engine optimisation;
 - Online booking systems;
 - Work with Online Travel Agents (OTAs);
 - Social media posting and advertising;
 - Coverage on review sites;
 - Contact with existing customers.



Programme 7: Talent Development

Having the right people with the right skills, knowledge and motivation in place to run our visitor businesses and work in them is vital to ensuring that the Island delivers an exceptional guest experience that leaves our visitors with lasting positive memories of their time with us.

The Island's visitor industry needs to:

- Improve pay and working conditions to make working in our visitor industry more satisfying and rewarding;
- Improve management skills;
- Hone the skills and knowledge of its core workforce;
- Improve career progression opportunities;
- Improve the recruitment and training of its seasonal workforce;
- Promote the visitor economy more strongly as a career opportunity;
- Address the visitor industry's staff accommodation and housing needs.

Extending the season to reduce seasonal employment and strengthen the financial stability of our visitor businesses will play a key role in attracting and retaining the talented workforce that we will need moving forward.

Objectives

- Fully staffed visitor businesses;
- A visitor sector that is seen as offering rewarding employment and an attractive career choice;
- A fully trained, knowledgeable, skilled and motivated visitor workforce.

Key Results

- High visitor satisfaction with customer service from visitor businesses;
- Low labour turnover in the Visitor Economy.

Actions

- Visit Isle of Man will work with the Locate team, University College Isle of Man, visitor businesses, training providers, educational establishments and UK and Irish hospitality training colleges to progress visitor industry-focused:
 - Business skills programmes for our visitor business owners;
 - Management development programmes;
 - Winter skills development and career progression programmes for our core teams;
 - Apprenticeship schemes;
 - Seasonal worker visa schemes for the visitor sector;
 - Recruitment and induction training programmes for seasonal workers;
 - Careers promotion initiatives for our school leavers and returning graduates;
 - Placement programmes for hospitality students studying in the UK and Ireland;
 - The possible re-establishment of a hospitality school on the Island;
 - Research to fully understand the visitor industry's staff accommodation and housing needs and identify ways of addressing them.

Delivery

The delivery of *Our Island, Our Future* will require strong leadership from Visit Isle of Man, effective partnership working, clear government support and ongoing monitoring and review.

Visit Isle of Man

As the agency for Visitor Economy growth on the Island, Visit Isle of Man has a central role to play in the delivery of the Strategy in three key ways:

- Informing delivery through:
 - Research;
 - Guidance;
 - Advocacy.
- Building delivery partnerships through:
 - Co-operation;
 - Facilitation;
 - Co-ordination.
- Directly delivering programmes:
 - Quality Assurance;
 - Strategic Marketing;
 - Business Support.

It will be vital to ensure that Visit Isle of Man is adequately and appropriately staffed, funded, managed and governed to fulfil these roles.

Visit Isle of Man will align its business plan, team and budget around the seven Action Programmes by:

- Assigning lead officer roles and responsibilities for each Action Programme;
- Establishing clear targets and KPIs for each Action Programme and putting in place performance measurement and management mechanisms to monitor and guide progress towards their achievement;
- Implementing a staff training, coaching and development programme to ensure that the team is fully supported to achieve what is expected of it.



Partnerships

Effective delivery of *Our Island, Our Future* will require all of the interested government agencies and departments, other bodies, visitor businesses and the travel trade to work in a concerted direction. The seven Action Programmes provide a framework to stimulate, guide and support this collaborative and collective working.



This process will be supported through:

- The establishment of task forces to progress specific programmes, projects and initiatives;
- The continued convening of the Visitor First Review Panel as the vehicle for co-ordinating cross-departmental government action to address operational, public realm and destination management issues;
- A refocused working relationship between Visit Isle of Man and visitor businesses that are committed to quality, effective marketing and environmental sustainability.

Government Support

Government policy support will be vital to the delivery of *Our Island, Our Future*. The Strategy seeks to inform and align the policies and strategies of all the government departments that have a role to play in Visitor Economy growth.

The successful delivery of *Our Island, Our Future* will also require government investment support in terms of:

- Core funding for Visit Isle of Man to enable the agency to fulfil the roles that are required of it;
- Financial support to accelerate the upgrading and development of existing visitor businesses;
- Capital investment and incentives to ensure the commercial viability of the transformational visitor accommodation and visitor product development projects that are needed to drive Visitor Economy growth and enable the Island to get ahead of the competition.



The seasonal nature of the Isle of Man's visitor market, limited liquidity in our visitor industry, and reluctance of commercial lenders to support visitor accommodation and product development projects on the Island are major barriers to achieving the required transformation of the Island's visitor offer. A review of the options for government investment, grant aid, loan support and covenant leverage is needed to fully understand how Government can help to address this market failure. This can in turn deliver good returns to the Government in terms of Exchequer benefit, payback, direct revenues and contribution to achieving many of the objectives of *Our Island Plan*. Fully researched and costed business cases for government investment support will be brought forward over time as Action Programmes are progressed and the feasibility of capital development projects is established.

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Monitoring & Review

Our Island, Our Future is intended to be a strategy that will evolve over time through periodic reviews against its waypoint targets. This process will be supported by a robust research and measurement programme to monitor progress; guide the future design and direction of the seven Action Programmes and their constituent projects and initiatives; and support business decision-making processes.



This will include:

- The ongoing roll out and development of the Passenger Survey and Visit Isle of Man's industry performance surveys;
- Visitor accommodation supply, quality and development monitoring;
- A programme of periodic visitor surveys and market research studies;
- Marketing campaign evaluation and conversion research;
- Periodic economic impact modelling for the Visitor Economy.



"The Strategy sets out a clear framework for co-ordinated action to transform the Island's visitor offer and take it proactively to market..."

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Moving Ahead

Our Island, Our Future articulates an ambitious vision for substantial Visitor Economy growth over the next 10 years, which all of our research evidence shows is entirely achievable given effective partnership working and strong government support. The Strategy sets out a clear framework for co-ordinated action to transform the Island's visitor offer and take it proactively to market, in order to attract more visitors over a longer season, spending higher amounts of time and money on the Island, supporting greater numbers of Visitor Economy businesses and creating new jobs. This in turn will improve leisure opportunities for Island residents, strengthen the Island's transport links, and contribute to wider economic development. Visitor Economy growth must not however be at the expense of our natural environment and communities or contribute to climate change. We must work continually towards a zero-carbon Visitor Economy by focusing on environmentally sustainable visitor activity, business operations and development projects. The Strategy gives us a clear way ahead for achieving this vision of sustainable Visitor Economy growth through to 2032, and a common agenda for Government and all Visitor Economy partners to get firmly behind, in order to secure the considerable benefits that can be achieved for the Island.



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