

ISLE OF WIGHT DESTINATION BID

BUSINESS INSIGHTS

Isle of
Wight

Consultation comments, observations, issues and insights

15th February 2016

Comments, observations, issues and insights resulting from:

17 business community, public consultations

215 Attendees, 156 Businesses & organisations

29 one-to-one meetings with significant organisations, product owners and associations

117 online business surveys

Types of businesses involved:

45%	Accommodation
15%	Retail
14%	Attractions
9%	Food & drink
7%	Services
10%	Other

Introduction

Between November 2015 and the February 2016 more than 300 people from across the Isle of Wight's business community have been engaged in the DBID consultation process. These people have represented more than 250 different businesses and organisations.

During these four months, the Island's business community has been approached via an online survey, inserts in the local press & business publications, discussions on local radio and face-to-face meetings at 17 venues across the Island, as well as 29 one-to-one individual meetings.

At each contact point, individuals have been encouraged to give their views in regards to the DBID itself, funding tourism in general and all issues regarding 'the visitor experience'.

During the same period, over 15,000 UK mainland residents completed an online survey in regards to how the Island is perceived by themselves as either a visitor or a prospective visitor. Key to this research was to identify what the main points of attraction are, what they look forward to when visiting the Island and what the potential barriers to visiting are for them.

On the following pages are the key insights taken from the various surveys and meetings along with an overall executive summary.

In support of the observations, insights, comments and issues raised from the business events, meetings & survey are also presented along with the details of the businesses involved, and the locations, dates, timings, and questions asked.

Details relating to the consumer survey are contained within a separate document (Visitor Insights: Consumer survey, comments and insights).

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Comments and issues raised at the 16 business community, public consultations

All the comments and issues raised at each of the events have been consolidated under the following headings:

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In regards to the DBID itself, the overwhelming response from all those who have attended either a public consultation or a one-to-one meeting has been very positive. Whilst other options were discussed none were found to provide a viable alternative solution to the needs of the Islands tourist industry.

With the prospect of a DBID in place the next important area of discussion related directly to what the Island actually needed - here the conversation always focused on the importance of generating increased footfall and throughout the year.

For this to happen a number of subjects were identified as being important areas to address - in particular marketing, the visitor experience and investment & regeneration.

Marketing

Unsurprisingly, this was the first area that was identified as being important as it would obviously play a vital role in increasing visitor numbers to the Island.

Destination marketing was seen as the most important issue that DBID money could help to address. In terms of detail, it was felt by most participants that whilst generating new visitors was absolutely crucial, encouraging previous visitors to return was also extremely important.

Beyond just recommending a focus on destination marketing, it was also felt that it would be important to promote the Island as an all-year-destination, again it was recognised that to achieve this there would also need to be an increase in Island investment.

To help achieve marketing goals the majority of the participants believed that finer targeting of selected audiences should be carried out and that those audiences ought to be of a higher quality in the expectation that they would have greater spending power. To this end, given its location in regards to the Island, London was often mentioned as a prime region to target.

As is often the case when discussing marketing, everyone has an idea as to what marketing should actually concentrate on and here a number of participants felt that it was important to promote and celebrate the uniqueness of the Island. Coincidentally, in the consumer survey, previous visitors also feel very strongly that the Island is unique and unlike any other UK destination.

Participants also identified the need to carry out measurable advertising, this is perhaps unsurprising given that they would - in the event of a successful DBID - be directly investing in marketing and advertising campaigns.

Beyond advertising it was also noted the benefits that festivals and events presently bring to the Island, and here it was felt that more could also be done with the possibility of creating additional weekend and seasonal events.

Finally in regards to marketing, it was proposed that a strong brand vision and identity should be developed - one that everyone could adopt and promote.

The visitor experience

After marketing, the visitor experience was identified as being the next major area that needed attention.

With the desire to create more marketing promotions throughout the year, comes the need to encourage attractions to stay open longer as well as creating new things for visitors to do - especially in the winter months. Here, attracting new blood and new investment was seen as being very important.

Also, in theory, with increased numbers of visitors, increased levels of income for the Island's economy should also follow. This additional income should allow many product owners to invest more in their own businesses, which was another issue that participants felt had been lacking in recent years.

In terms of actual visitor experience, better signage throughout the Island was seen as essential - especially in Newport.

Also, upon arrival on the Island it was felt important to give a good impression and here a number of concerns were voiced that the visitor experience wasn't as good as it could be.

Other areas of concern, were amenities, parking and the general tidiness of towns, villages, countryside and beaches. To this end it was believed that a single body responsible for tourism should monitor how the Island is presented to visitors and make sure that everything was done to provide a rewarding experience.

Investment & regeneration

In the consumer survey, an area of concern for the Island is the fact that 51% of visitors believe that some parts of the Island are a bit run down, this was also a concern with business owners. Regeneration was seen as something else that needed vital attention if the Island's tourism economy was to not just be maintained but to grow.

Although consumers felt that accommodation was good, with 67% feeling that the Island offered a great range of high quality accommodation, many business owners felt that a number of locations were now looking tired and in need of investment.

Likewise some of the Island's key towns, like Newport, Sandown and Ryde were identified as needing additional regeneration attention.

Overall, it was hoped that with DBID money would come a change in attitude and a greater belief in the Islands economy - with greater levels of marketing opportunities driving greater levels of footfall and subsequently driving greater levels of outward and inward investment, along with greater opportunities for regeneration.

Ferry travel

Beyond marketing, the visitor experience and investment & regeneration, the greatest concern and potential barrier to people choosing to visit the Island was identified as being the cost of ferry travel.

With both visitors and Island businesses it was recognised that the excitement that a trip to the Island can bring, begins with the ferry journey. However the price of that journey was identified by all parties as being the major reason why people might decide against visiting.

However, 71% of visitors actually believe that the Island is made more special and enjoyable because of the ferry journey. Moving forward, the focus must be on raising the positive emotional connection between the ferry journey and a break on the Island. By raising the enjoyment factor in regards to ferry travel, individuals would be less likely to question the cost as they would see it as an integral benefit to taking a break on the Island.

Additionally, the concept of packaging ferry costs with accommodation costs was seen by consumers as a distinct advantage.

With businesses, it was felt that a close working relationship with the ferry companies was vital. The importance of this can be identified in the fact that many business owners identified late booking as now being a key issue for them - this is likely to be even more prevalent with out of season weekend bookings. The problem here lies in the concept of last minute decisions - with ferry travel providing an additional cost, potential visitors are more likely to dismiss a trip to the Island on pure cost grounds. In the consumer survey 25% of those who had never visited and who gave a reason, identified cost as being an issue. Likewise with previous visitors, 37% didn't believe that ferry travel offered good value.

With the online business survey the overwhelming concern was with ferry prices, leading many responders to promote the idea of a fixed link. However this ignores the benefit that ferry travel can bring and also misses the fact that without it the Island would probably seem to potential visitors less distinctive from other UK destinations.

Return on investment

Given that with a successful DBID - many business owners would now be directly contributing to whatever a single body responsible for managing the money planned to do with it - what would their desired return on investment be?

Here, the response was quite simple, greater levels of individual business footfall, producing greater levels of business income. Additionally though, it was also identified as being important to improve the overall visitor experience, attract 'new blood' to the Island and encourage greater pride in what the Island has to offer.

Training was also identified as being a key area that a single body should help promote and support - especially with and for smaller businesses. Again this was felt to be essential in helping to develop a rejuvenated Island tourist industry.

Key observations...

from the 17 business community,
public consultations

The following, is a distillation of the most popular comments made at the various events.

Regarding the DBID

Yes, this is seen as a very positive move for the Island

There are no perceived credible alternatives

That would receive as favourable support

Having a well funded single body responsible for tourism on the Island is essential for moving the Island forward

Regarding marketing

Marketing is seen as the most important aspect in regards to how revenue generated from the DBID is used.

Marketing is key to developing and protecting the Island's tourism industry

These are the most important popular issues raised in relation to marketing:

Focus on destination marketing

Encourage more new visitors and returning visitors

Create and promote more off-season advertising, and present the Island as an all-year-round destination

Identify key target audiences and focus attention on them

Celebrate and promote the uniqueness of the Island

Create measurable advertising

Create a strong brand vision and identity that everyone can adopt

Regarding return on investment

There are the two areas of ROI that proved important to the business community.

Regarding tourism as a whole:

Increased number of visitors

Increased number of returning visitors

Improved visitor experience

Especially upon arrival, then throughout the Island, from the beaches to water quality, from the towns to the countryside - including new and improved amenities and better parking experiences.

Regarding individual businesses:

Increased footfall

Increased levels of income

Provide support and training opportunities

Especially for smaller businesses

Regarding the role of a single body

This was seen as being very important for the Island as it can help to:

Raise the profile of the Island

Encourage more investment

Both generally and specifically with some asset owners

Maintain a close working relationship with the ferry companies

Encourage offers and deals - and monitor service

Help promote the ferry crossing experience

Change attitudes

Encourage more pride in the Island

Bring people together

Encourage people to be less 'me' and more 'we'

At the same time, a single body must also be seen to be:

Inclusive

Transparent

Accountable

The full list of comments can be viewed from page 12 to page 26.

Key observations...

from the 29 one-to-one meetings

During the one-to-one meetings each business, organisation and association was told what the DBID was, how it might affect them and what the advantages could be for the Island in general, for the areas of business that they are involved in and specifically for their actual business or organisation.

Some of the one-to-one meetings were held with individuals, whilst others were with executive committees.

In regards to the DBID

All businesses, organisations and associations felt that this was a good thing, offered an excellent opportunity for the Island and was the only practical option moving forward.

In regards to the role of a single body responsible for promoting the Island after a successful bid

The overwhelming feeling was that this offered a great opportunity to bring the Island together; providing a single point of reference with a transparent and accountable process.

In regards to additional support

A number of the larger retail businesses were keen to not just offer their moral approval but would also be happy to get involved wherever they could by spreading the word throughout their individual organisations and where possible & feasible, integrating Island opportunities into their various loyalty programmes.

Key observations...

from the online survey comments

Whilst each of the online survey respondents left a number of different points, without the structure of the public forums and one-to-one meetings, their comments lacked focus and were far more varied and related to specific issues that they personally saw as being important.

The following, are the only common points raised:

The cost of ferry travel

Reduce the cost of fares

Create more discounted offers

Create a fixed or alternative links across the Solent

Less common but also mentioned by a number of respondents:

Increase out of season visitor numbers

Make the DBID levy more affordable

Reduce business rates

More fairness in the levy proposal

In regards to growing the Island's visitor economy, the respondents were also asked to rank in order of importance, which potential barriers they believed offered the greatest challenges in terms of growth.

This is the ranking, with 1 being the biggest challenge and 5 the least problematic:

- 1 Accessibility to the Island
- 2 Quality and range of accommodation
- 3 Quality and diversity of the Island's leisure and retail offer
- 4 Investment in marketing and promoting the Island across the UK
- 5 Availability of trained and skilled staff

The full list of points made can be viewed from page 27 to page 30.

Key insights...

from the consumer visitor survey

The objective of the consumer survey was to identify key tourism related insights along with potential opportunities and barriers to people visiting the Island.

Much of the survey was constructed using multiple choice questions including those with agree or disagree options.

All responses were collated, segmented and then grouped together for analytical purposes with the focus on providing useful, workable and credible conclusions.

The following, is a distillation of the most popular points made from the various survey respondents.

Positives in relation to the Island

Strong positives

Rest and relaxation

Coast and countryside – including beaches, sea and fresh air

Picturesque towns and villages

Friendly and welcoming

Easy to travel around

Is different from other UK destinations

Positives

Accommodation

Range of things to do – including walking and cycling

Has some of the best events in the UK – sailing and festivals

Reputation for great food and drink

Positives with issues

Pleasantly old fashioned

Not universally agreed with as some see the Island as being old fashioned in a negative way.

Easy to get to

This is only the case with people who live relatively close to the Island and even some of those identify the ferry as an issue for them in a negative way.

Is more enjoyable because of the ferry journey

Whilst many see this as the case it is again not universally agreed with. However, given the number of people who said that they emotionally connect with the ferry journey as the point when their enjoyment starts, there is an opportunity here to make the ferry a more important asset to spending time on the Island.

Issues in relation to the Island

Some areas are seen as being a bit run down

Unfortunately, this is seen as a product truth and combined with old fashioned it might be seen by some as a barrier to wanting to visit the Island. However, in open comments this did not seem to be a major issue.

Cost of ferry travel

With those who had never visited the Island the cost of the ferry was the overwhelming issue for them.

It is also an issue with those visitors who come from the majority of the prime target market locations.

Not overwhelmingly seen as cheap compared to other areas

This is almost certainly an issue that is linked to the cost of the ferry.

Product opportunities

Create ferry/accommodation packages

By creating special offers and travel packages ferry travel as a barrier can be reduced.

Make ferry travel more appealing on an emotional level

By incorporating more emotionally beneficial ferry propositions, ferry travel could be shown as more emotionally appealing, especially to prospective visitors from prime and secondary locations.

Create visitor get visitor and friends & family promotions

Given that 78% of responders who had visited the Island would recommend it to others and that 18% said that visiting friends and family was the factor for them coming to the Island, combined with the additional fact that 22%

of those who had never visited said that a recommendation from a friend or family might influence or encourage them to visit. Then promotions designed specifically for that purpose might prove extremely popular – especially during quieter travel periods.

Insights

All responders irrespective of whether they've visited the Island recently, some time ago or never, seem to be very reflective when they describe the Island and what they perceive to be the benefits of visiting it.

The Isle of Wight seems to make a very emotional connection with them. They mention memories and childhood, family and home but not in a saccharine way. They are both contemplative and thoughtful in the way they respond to prompts.

Comments and issues raised at the 17 business community, public consultations

Comments and issues highlighted in **bold** are those that were mentioned by a number of people and those highlighted in **bold and colour** were mentioned at the majority of the events and agreed upon by the majority of attendees.

Regarding marketing

The overwhelming issues discussed at all the public consultations involved marketing and specifically the need to drive greater levels of footfall.

The following were the individual points raised:

- 1 **Marketing is key**
 - ***Epecially destination marketing***
- 2 **Need to get more people to visit the Island**
 - ***Stop the decline in visitor numbers and increase footfall***
 - ***More new visitors***
 - ***More visitors re-visiting***
 - ***Help to fill hotels***
 - ***Increase winter trading***
- 3 **Extend the season**
 - ***To an all the year round destination***
- 4 Make the Island a place that people would want to recommend to friends and family
- 3 Late booking is an issue!

Also it was felt that:

- 4 People would want an element of control over marketing spend

Core marketing objectives

Most commented on points were:

- 1 Making a difference
 - ***Attract marketing***
- 2 **Focusing on destination marketing**
- 3 **Identifying and marketing to key target audiences**
 - *Targeting them precisely*
- 4 **Increasing footfall**
 - *Getting people to come to the Island, increasing:*
 - ***Visitor numbers***
 - ***Repeat visitors***

5 Increasing footfall in shops and attractions

6 Celebrating the uniqueness of the Island

Secondary objectives

A number of attendees identified the need to:

- 1 Carry out research
 - *Identify what makes the Island attractive*
 - **Carry out a national survey throughout the UK**
 - **Find out why people choose the Island**
 - **And, not choose**
 - *Identify what needs to change*
- 2 Focus on the key attraction of the Island
- 3 Raise the profile of the Island
 - *Promote a positive feeling towards the Island*
- 4 Advertise the Island as an exciting place
 - *A special place*
- 5 Create a vision that businesses can identify with
 - *See a plan*
- 6 Develop a strong brand
 - *An Island brand*
- 7 A cohesive brand identity that everyone can leverage
 - *As per the Isle of Man*
- 8 **Create a brand bible**
 - ***With a simple message***
 - ***That everyone can use***
- 9 Create measurable advertising
 - *Measure success*

Awareness objectives

In regards to creating awareness, attendees believed it was important to:

- 1 Create off-Island advertising and marketing
 - *With budget to spend*
- 2 Create nationwide marketing
- 3 Create creative ideas that have PR value
- 4 Focus on national tv ads
- 5 Promote beautiful beaches, landscape and countryside
- 6 Create more geographical awareness
- 7 Promote day trips
- 8 Promote West Wight
 - *Hidden gem*
- 9 Raise perceptions of the Island

Targeting

In regards to targeting, attendees believed that it was important to:

- 1 Be seen and heard on the mainland
- 2 Identify who the key target audiences are
 - *And why*
- 3 **Target Londoners**, because:
 - *They potentially have higher spending power*
 - *See Island as a cheap break*
- 4 Target higher income families
 - *Upmarket tourism*
- 5 Target younger audiences more
 - *Create wider appeal*
- 6 Target empty nesters
- 7 **Target nationwide** and European marketing
- 8 Target film and tv production companies
 - *Promote Island locations*
- 9 Create stronger links with the major festivals
 - *Encourage re-visits*
- 10 Create an exhibition programme
- 11 Identify target audiences that can provide
 - *Quality*
 - *Quantity*

Digital media

In regards to digital media, attendees believed:

- 1 Not enough is being done in terms of digital marketing
 - *Seen as being cheap*

Also, that it is important to:

- 2 Keep up with the digital age
- 3 Encourage and engage in new marketing techniques
- 4 Have an excellent website
- 5 **Carry out internet advertising**
 - ***To support websites***
 - ***To provide social media support***

Media spending

In regards to media buying, attendees believed that it was important to:

- 1 **Spend more in the winter months**
 - ***Create greater footfall during that period***
- 2 **Have one publication to advertise in**
- 3 Concentrate on school holidays

- *Family market*
- 4 Match target media to different generations
 - *Social media for young*
 - 5 Need to spend more than £4million
 - 6 Promote winter attractions that are open and available now

Additional issues, comments and observations

In terms of other marketing issues and priorities, attendees believed that it was important to:

- 1 Promote the Island as a safe and secure place
- 2 Market the Island as an all-year-round 12 month destination
 - *Businesses will stay open once they see visitor numbers increasing*
- 3 Welcome people on arrival
- 4 Promote the Islands rich history
 - *History trail*
 - *Island timeline*
- 5 Promote quality locations
 - *Get great hotel accommodation providers to group together*
- 6 **Protect our market**
 - ***Maintain what we have***
 - ***Stop the decline***
- 7 **Get people to book and stay longer**
 - *Give people a good reason to come back more frequently*
- 8 **Get more big events to the Island**
 - *Events make people aware of the Island and what it has to offer*
 - *Can help increase footfall*
- 9 Create and promote more off season events
- 10 Create and promote more free events
 - *Such as the scooter rally*
- 11 Create advertising benefits for those who have contributed to the DBID
- 12 Create banners for businesses
 - *So that people know who they are*
- 13 Better marketing in regards to ferry prices
- 14 Support smaller businesses
- 15 Improve customer service
- 16 Create a top list of places to go and see
- 17 Create an all Island link
- 18 Promote Newport as a place to visit
 - *And not to avoid*
- 19 Entice visitors to smaller towns
 - *Such as Bembridge*
- 20 Create a quality assurance scheme

- 21 More promotion of transport links
 - *Trainline*
 - 22 Create just one brochure
 - *Not multiples or guides*
 - 23 Create an annual tourist publication which lists the names of all businesses
- But:
- 24 The concentration should not just be on marketing

Regarding Island issues

Three areas were identified and discussed at length:

- 1 Quality of the visitor experience**
 - 2 Quality of the Island product, the need for regeneration and investment**
 - 3 Ferry prices**
- 3 Make sure people can have a good time when they're here
 - *Will want to return*
 - 4 Address a lack of attractions

Improving the visitor experience

A popular subject was about improving the Island in general and the need to:

- 1 Clean up the Island**
 - ***Keep it looking nice and attractive***
 - ***The appearance of the Island is very important***
 - *Introduce more flowers*
- 2 Do more to support landscape and AONB
 - *These are seen as key Island assets*
- 3 Improving the environment
 - *ECO friendly Island credentials*
- 4 Raise general standards
 - *Must be seen to be modern*
 - *Compared to other resorts*

Also mentioned was the need to:

- 5 Work closer with major retailers
 - *Including possibly linking with rewards schemes/deals*
- 6 Encourage new business to come to the Island
- 7 Improve local and business signage
- 8 Bring in a variety of new people
 - *Fresh blood*

Roads and transport

A number of attendees also mentioned the need to:

- 1 **Improve road quality**
- 2 **Improve road signs**
 - **Positioning and milage markers**
- 3 Make it easy to get around the Island
 - *Good public transport*
- 4 Improve bus services
- 5 Keep the trains funding in place
 - *Well maintained*

Amenities

Another popular area of comments was in regards to:

- 1 The general lack of amenities and toilets
- 2 Improving amenities
- 3 **More and better toilets**
 - **Open up closed ones**
 - *Especially around beaches*

Beaches

Many attendees also highlighted the need for:

- 1 **Cleaner beaches**
 - *Carried out daily*
 - **Blue flag beaches**
 - *Re-create beach awards*
- 2 Cleaner water
 - *Quality of water in resort areas*
 - *Hold water companies to account*

Also mentioned was creating:

- 3 Some children's beach entertainment
 - *Soft play areas*
- 4 More beach showers
- 5 Better beach access

Attractions

A range of suggestions was made in regards to attractions, including creating:

- 1 Better quality 'must see' attractions

And possibly including:

- 2 **A wet weather facility**
- 3 A theme park
- 4 A water complex
- 5 A winter focused complex
 - *Help build winter footfall*

- 6 More entertainment
 - *Especially for younger people*

Also mentioned was:

- 7 The need for more events
- 8 Encouraging attractions to extend their seasons by providing more events on their sites

Towns

Many attendees mentioned:

- 1 **Making the Islands towns more appealing**
- 2 **Keeping the towns clean and tidy**
 - *Especially pavements*
 - *Address dog mess issues*

However some felt that this:

- 3 Should be the job of the Council, not for DBID money

Also mentioned was:

- 4 Animating towns
 - *Cafe culture*
 - *Evening tourism*
- 5 Keeping high street shops open longer, especially in the evening
- 6 Attracting better quality retail
- 7 Making Newport more appealing
- 8 Improving Newport's market
 - *Making it a place where people wanted to go*
- 9 Improving signage in towns

Parking

As with ferries, many attendees commented on parking and specifically:

- 1 **The availability of parking**
- 2 **The cost of parking**
- 3 Reduced charges would help shopping
- 4 Clean parking areas and facilities
 - *Especially near beaches*
- 5 Provide visitor parking permits
 - *Purchased in advance*
- 6 Free parking for smaller cars
- 7 One day a week free parking
- 8 The option to pay for parking on exit rather than having to pay up front
 - *Gives people greater choice*
 - *Allows people to browse for longer without pressure*

Regeneration and investment

Another very popular area for discussion was **planning and regeneration**, including:

- 1 Making sure that the first impression of the Island is a good one
 - *Getting off the ferry at Ryde Pier Head*
 - *Not a good impression*
 - *Train is rundown*
- 2 Improving run down areas
- 3 Creating a better infrastructure

Along with:

- 4 Improving standards across the Island
- 5 Improving tourist areas
- 6 Improving planning policy
 - *Including an action plan*
- 7 Boosting the economy now
- 8 Regenerating Sandown
- 9 Need better access to:
 - *Trains*
 - *Shanklin Lift*
- 10 Making sure that shops and visitor facilities are never left looking derelict

Also remembering that:

- 11 Urban and rural areas are equally important
 - *Both equally attractive*

Most attendees at the different events believed that there is an urgent need for new investment and overall funding

This was seen as crucial in regards to regeneration and development:

1 The Island needs inward investment

Some believed that:

- 2 Businesses need to invest in their own businesses
 - *Generally need to improve hotels*
 - *Modernise*
- 3 The Council and DBID can't do it all
 - ***Town and parish councils should step up***
- 4 People should take responsibility for the look and state of repair of their properties
- 5 The DBID can't solve every issue

However, the DBID was seen by the vast majority as:

- 6 A positive potential investment opportunity for the Islands future

Although one group felt that:

- 7 Whilst the DBID option was a good idea, they didn't feel that they'd had enough information or feedback to go to bid quite yet

Hotels

As a key part of tourism, hotels also came in for a number comments, including:

- 1 **The need to improve quality**
 - *Too many hotels are looking tired and dated*
- 2 **The need to get rid of grotty accommodation**
 - *Letting everyone down*
- 3 The need to modernise
 - *WiFi in accommodation*
- 4 Encouraging more branded hotels to the Island
 - *Premier Hotels*

And possibly:

- 5 Creating a secure conference centre
 - *For the benefit of local hotels*

Ferries and ferry prices

This was another very popular area of discussion and it was recognised that:

There is a need to work closely with the ferry companies

Also that:

- 1 Cross Solent travel is a key issue in regards to people visiting the Island
- 2 The need for quality ferries
 - *The experience starts with them*

Many attendees commented on a number of issue in regards to fares:

- 1 The actual cost of getting here
- 2 **Ferry prices do make a difference**
- 3 **The need for cheaper ferries**
- 4 Visitor discounts on ferries
- 5 Promote the Island when ferry prices are cheaper
 - *More visitors will come*
- 6 Online ferry bookers don't get discounts on trip advisor

Also mentioned was:

- 7 Issues with ferry services
- 8 Have a say over ferry companies
 - *Buying power*
- 9 Information centres at ports and on ferries

One attendee also mentioned:

- 10 The need for a fixed link

Regarding the DBID itself

The DBID is seen by many attendees as being a good thing that has got people working together in unison.

1 **It is a good idea**

2 **There is no alternative**

- *It is the only solution to funding*
- *It has to work*
- *But add on's such as corporate sponsorship could offer some additional help*

3 **It is the best solution**

4 **It is very important - it is vital to the Island**

5 **Great potential**

- *Very exciting*
- **100% for it**

Some people also believed that:

6 There's no plan B

And,

7 That the DBID is a right and fair way for all businesses

Although some people did wonder if:

8 There were any alternatives

9 If it was too late for anything else

- *Need something and this is a potential solution*

Other suggestions

Alternative funding solutions mentioned:

1 Volunteering money into a Voluntary Scheme - and see how we get on

- *Use DBID [investment?] money to propose a voluntary fund*

2 **Look for other businesses to replace the councils 50% funding and carry on as is**

3 Make it a statutory payment for targeted businesses

- *Then target more businesses as people see the success*
- *Others will want to join in*

4 That the Island should arrange some form of sponsorship

- *As per the Spinnaker Tower and Emirates*

5 The Island could possibly collaborate with some mainland towns and Channel Islands authorities to create a worldwide market

6 Pool all marketing budgets into one pot

- *Use the money for a greater good*

A number of people mentioned that they would prefer (whilst at the same time, many others disliked) the idea of:

7 **Charging a visitor tax - a levy on every visitor**

- **Raised by the ferry companies**
- **Felt by many that it would discourage visitors and those re-visiting**
- **This would reduce footfall**

8 Introducing a bedroom tax

- *As other countries do*
- *£1 per head*
- *Would need to identify the mechanics for this (Someone suggested a bucket at the ferry ports!)*

It was also suggested that:

9 An accommodation tax could be incorporated in addition to the DBID

- *Help to generate even more money*

A number of people also mentioned that they would prefer:

10 A TBID (TouristBID)

11 **Get the major festivals to pay towards funding**

- *Bestival*
- *IoW Festival*

A number of people identified a tax concept as an issue because:

1 Tax is an ugly word

- *Tax is seen as a negative*

2 The actual cost to businesses

3 **Keep business rates low to subsidise the DBID levy**

Issues with the actual proposal

Many attendees believed, that whilst the DBID is a great idea:

1 It should be extended to all businesses

- *That everyone should contribute - not just the 2,500 targeted, as everyone will benefit*

2 It should be more inclusive

- *Include lower rateable value businesses*

3 Perhaps a sliding scale option should be incorporated

- *What fits your business*
- *Pay what you feel fits*

4 Introduce a 2 tier percentage charge

- *2% for those businesses that might benefit from marketing*
- *1% for those business that will not directly benefit*

5 Bigger businesses should pay more

- *Not capped at £20k*
- *Increase the cap on big businesses like Tesco etc*

Also,

- 6 The organisation behind the bid should focus on one thing
 - *Should not be fragmented*
 - *Should be united*
 - **Trying to do too much is a risk**
- 7 There was no mention of:
 - *Accessibility*
 - *Local produce*

Regarding return on investment

Some people said they would expect:

- 1 An increase in the amount of money a business takes
- 2 A full return on investment
 - *More would be good*
- 3 An increase to the bottom line of all levy payers
- 4 A double return on investment
- 5 More disposable income

Many people said they would also expect:

- 6 An improved visitor experience
- 7 **Continued growth**
- 8 **Increased footfall**
 - ***To the Islands, hotels, shops and attractions***
- 9 **Increased number of returning visitors**
- 10 Training opportunities
- 11 The DBID to bring people together, as the Island has a lot to offer

Others mentioned that:

- 12 By working together grouped buying opportunities ought to be made available
- 13 Those industries working in the tourism sector have the focus for action placed on them

Whilst others mentioned that:

- 14 All sectors should benefit

And others wondered:

- 15 What ROI they might see?
 - *How quickly?*

Regarding the role of a single body

The need to lead and coordinate tourism

A number of attendees at a number of the events believe:

- 1 **The Island does need a single body**
 - *It is a good idea*
 - *It is very important for the Island*

Presently some many attendees believed that:

- 2 **The Island is fragmented and negative**
- 3 Businesses and Town Councils are not as connected as thought
 - *Hard for them to work together*
 - *That having a strategic business partnership is important*
- 4 People need to see the bigger picture
- 5 **The Island needs to embrace itself**
 - *Including ferries, as they are also part of the experience*
- 6 **People need to help, even if they don't see the benefits personally**
- 7 Businesses need to take pride in their communities
- 8 **To be a community based Island**
 - *Everyone needs to be going in the same direction*
 - *The Island needs to be united*
- 9 **That the Ferry companies involvement is important**
- 10 **That being represented by a single body in some way is a good idea and they liked it, because it can help unite the Island**

It is also believed, that it's important that:

- 11 **It raises the profile of the Island**
- 12 It takes on the lobbying role of the Council
- 13 **It should not only be a marketer for the Island but also an advocate**

Some also believe that it's important:

- 14 To keep the loW act in place

The need for clarity and inclusion

A number of the attendees pointed out the need to:

- 1 **Be able to engage with everyone**
- 2 Be able to change attitudes
- 4 **Allow individual towns to be heard**
- 4 Be 100% transparent and accountable
- 5 Everything needs to be measurable
- 6 Have representation from non-RV rate payers on the board

Some also questioned:

- 7 If it will be possible for everyone be able to work in unison?

- *Can this be managed? As some people might not be forthcoming in working together*

8 If a single body will be able to represent each business?

9 Where would the focus be aimed?

It was also pointed out that the Island:

10 Does not need a talking shop

Training

Another very popular subject that was felt to be very important for a single body to address was training. **Training staff can help:**

- 1 Make a difference
- 2 Create specialist support and knowledge
- 3 Create much needed quality service
- 4 Provide shared engagement
- 5 Learn new languages
- 6 Smaller businesses

Regarding other authorities

Presently some attendees:

- 1 Were unhappy with bodies already in place - Chamber of Commerce was mentioned
 - *They're unsure what these bodies actually do for the Island's businesses*

Whilst others believed that:

- 2 The Council should be required to maintain and improve empty buildings
- 3 Town councils need to raise money for their upkeep
 - *Not paid for by DBID*
- 4 The Island should join Hampshire Council
 - *Benefit from their council tax*

Additionally

A number believe that:

- 1 VisitIsleofWight should be appreciated for rising to the occasion
- 2 Winchester has a DBID in place and it has works well
- 3 That VisitIsleofWight should continue, be maintained and allowed to gain in confidence
- 4 The DMO should continue and expand

Also,

- 5 The IW Festival has put the Island on the map
 - *It need's to stay there*
 - *And not be allowed to decline*

Online survey...

thoughts and ideas on how to develop the Islands visitor economy

Spaces between points denotes where one persons comments ends and another's begins. Bold text denotes a common subject.

Proportional tax - *The levy should be set according to the level of tourism that a business engages with*

Cost of the ferry fares are the biggest obstacle

Target a younger market

Reduce commercial rates

Bring the best out of the Island

Tax on profit - *The levy should be based on the profitability of a business*

Business rates are depressing business - reduce rates

Need quality attraction

Need easy, well priced ferry's

Still confusing over who's responsible for marketing the IoW

Support new ferry links

Need all Island businesses to come together and work towards the same goal - increasing visitor numbers

Ferry prices and crossings put people off

The Island's main towns put people off - derelict and decrepit buildings

Visitor amenities not good enough

Match the product quality and vision of other regions and countries

The Solent is the barrier

Need a fixed link

Reduce red tape

Reduce ferry prices

Involve smaller businesses

Promote less popular areas of the Island

Use rural locations to hold visitor information

Help smaller businesses with online marketing

Training

Ignore parking and flowers focus on the stuff that's not easy

Leave easy stuff to Parish Councils

Discounts on ferries

Especially for returning visitors

Research into: why people visit; what are their first thoughts; would they return and why; why have you not visited

Include small businesses views

Include rural areas

Levy only tourist businesses

Create a toll based link

Reduce emphasis on festivals

Promote accommodation marketing outside of peak periods

Focus on out peak period reasons why people should visit

Cheaper ferries

Fewer out of town supermarkets

Town parking

Improve roads

Wives like visiting the Island

Island tourist businesses should speak with one voice

Don't forget foreign students studying in the UK

Improve and reduce the price of town parking

Support small independent businesses in town centres

Stop further supermarket development

Create a fixed link

Target younger people because the old ones die

Focus on dogs, walking and cycling

Create a fixed link

Offer inclusive ferry, accommodation package

Booking cancellations due to ferry costs

Closer business links between Island businesses and the festivals

More networking and assistance opportunities for small businesses

Integrated travel links with the mainland

Clean beaches

Tidy streets

Good facilities

Create a special place

Good digital connectivity

Accommodation providers could work more with attraction providers and sell tickets in advance

More internet advertising

Help with staff training

Persuade exempt businesses to come on board

Encourage out of season special offers

Reduce ferry fares

Reduce parking charges - pay on exit

Reduce ferry charges

Reduce bus fares

Help small shop owners because the Council are disinterested

Improve train services

Link to other travel services

Create a fixed link

Improve Ryde - gateway location

More support and understanding in regards to small businesses

More fairness

Reduce ferry charges

Strong leadership

And you'll never please everyone

Undercover (all-year-round) water park in Sandown

Cap high season ferry fares

Discount longer-term visitors

Offer attraction book with discounts

Reasonable ferry fares

Attractive ferry offers

Improve visitor information, bus routes and tours - at ports

Encourage professional training - lifeguard training and protect Island beaches

Make the Island more financially accessible

Reduce travel costs

Free parking for an hour

Speed up new development

Be positive and upbeat

Introduce a visitor levy

Cheaper fares for longer stays

Better internal communications

Exclude the Council from everything

Promote local food tourism

Landlords of empty properties should be made to maintain their premises to a good standard

Locals should have a say in how their high streets look

No visitor tax

Better, more efficient ferry service or alternative connection

For everyone and not a select few

Promote traditional coach tours again

More joined up thinking in marketing

Help sole traders be seen

Take the Island upmarket

Improve Island towns - particularly Sandown

Make rates more appealing to effective businesses and less appealing to empty premises

PR the Islands diversity in arts, culture and food

Focus on real people and influencers

Promote the Islands well-being and health sector

Hot spot for fitness, yoga, mindfulness and the outdoors

Reduce the cost of ferry travel

Make day trips more appealing

Need better local and national political representation in regards to tourism

Sector quality assurance

Negotiated insurance

Fund sourcing

Festival review - Island income v missing tourists in June

People stay away during festival period - businesses quiet (35% reduction)

Businesses should do more networking - not just down to VIOW

Create new attractions

Create weather resistant attractions to help extend the season

Return visitor ferry offers

Attraction ticket sellers walking around towns

Better town planning and development

Planning engaged with VIOW

IOWC should be more positive in regards to tourism

Council struggles with joined up thinking - needs to see the big picture

Switch from volume to quality

Appendix I

Businesses and organisations involved

Adventure Activities UK
AGF Holiday Cottages
Albert Cottage Hotel
Allnatt Outdoors
Andrew Turner MP
ARC
Arcadia (Ryde)
Architect Norman White
Arts and Healthcare
Available Light Gallery & Gifts
Avenue Hotel
Away Resorts
BAMCO
Bank Cottage B&B
Barclays Bank
Barthwood Cottages
Baywatch on the Beach
Belmont Hotel
Belmore Hotel
Bembridge Harbour
Black Cat
Black Cat Thai Restaurant
Blaze Café
Bluebells at Briddlesford
Bodster Equine Assisted Learning
Community Interest Company
Co-operative Food (Freshwater)
Bourne Hotel
Brighstone Holiday Centre
Brunswick Hotel
Bullsgate Cottages
Bump Express
Busy Bee Garden Centre
Carpenters Farm Campsite
Chale Bay Farm
Channel View Hotel (Shanklin)
Chapel Lunch
Charcoal Grill
Cheverton Copse Holiday Park
Chocolate Apothecary
Chubbys Takeaway
Claremont Guest House
Cliffhall Hotel
CMG (Hotel developments)
Colemans Farm Park
Computer Plus
Cowes Corinthian Yacht Club
Cowes Town Council
Countryside Land Owners Association
Curraghmore Hotel
David Grocock Guest House
Diana Deacon
Dinosaur Expeditions
Dinosaur Isle
Dobson Training
Dorset Hotel
Dragonfly
East Cowes Marina
Endeavour House
English Heritage
English Riviera
Esplanade
Exotic Pets
Fitness Factory
Fort Holiday Park
Fort HP
Fresh Café
Friends of Brading Roman Villa
Garden Isle Hotels
Garlic Farm
Godshill Park Farm
Go Local Isle of Wight
Goodyears Outdoors
Gotten Manor
Granee Gifts
Hadfield Cottage Holiday Cottage
Hambrough
Happy Mondays
Harveys of Yarmouth
Heath Cottage
Heritage Great Britain – The Needles
Landmark Attraction
Hermitage Court Farm
Hill Farm, Brading

Hobbs Jewellers	National Farmers Union
Holdsworth Hotels	National Trust
Holiday Cottage	Newport Business Association
Holly Tree House Bed and Breakfast	Newport Quay Hotel
Home from Home Holidays	NFU (National Farming Union)
Hovertravel	Ninham Country Holidays
Hursts	Norris Family Grocers
Ian Jenkins	Oasis
Inspire	Old Barn
Island Gems	Old Barn Touring Park
Island Holiday Homes	Orchards Holiday Park
Island Life Magazine	Parterre Holiday Apartments
Island People	Present Times
Isle Access	Prices Wight
Isle of Wight Airport	Primedrive Car and Van Rental
Island Holiday Homes	Priory Bay
Island Life Magazine	Pub Masters
Island People	Quarr Abbey
Isle Access	Red Funnel
Isle of Wight Airport	Redway Farm
Isle of Wight Bus Museum	RNLI, Bembridge
Isle of Wight Chamber of Commerce Tourism & Industry	Robinsons Holidays
Isle of Wight Council	Rock Shop
Isle of Wight Experian	Rosemary Vineyard
Isle of Wight Holiday Park Association	Royal London Yacht Club
Isle of Wight Pearl	Royal Marine House
Isle of Wight Radio	Ryde Business Association
Isle of Wight Steam Railway	Ryde Golf Club
Isle of Wight Traders	Rylstone Manor Hotel
Isle of Wight Transport Museum	St Georges House
Isle of Wight Zoo	Sandhill Hotel
J&M Cooper	Sandhills Holiday Park
Keats Cottage	Sandown Business Association
Kemphill	Sandown Pier
Kingswood	Sandringham Hotel
Kite Hill Farm Caravan & Camping Park	Sands Hotel
Ladies Realm	Scotties fishing tackle
Landguard Manor	Seaview B&B
Leconfield	Seaview Hotel
Little Rannoch Hotel	Seaview Services
Lockslane Contemporary Bistro	Self Catering Cottages /Little Upton Farm
Love Running	Shanklin Chine
McAlister Properties	Shanklin Health Store
Medina Valley Services	Shanklin Seafront
Military and Heritage Museum	Shanklin Theatre & Community Trust
Model Village	Skinners Farm / West Wight Sport Centre
	Skyline

Snowdon House	The Sports Shop
Snowdrop Cottage	The St. Leonards Guest House
Southern Vectis	The Studio Apartment
South West Trains	The Taverners
Spinnaker Chandlery	The Wight
St Leonards Guest House	Theodosia
Staysail Management	Tim Brayford Landscapes
STC	Travelodge
StMichaels	Upperchine Holiday Cottages
Sudni Training and Heritage	Vectus Ventures
Summerhill Apartments	Ventnor Arts Club
Sun Inn,	Ventnor Exchange
Sweets & Treats	Ventnor Towers
Sycamores Barns	Ventnor Winter Gardens
Take 2	Vernon Cottage
Tapnell Farm	Vintage Vacations
Tarvic 2	VIP Cottages
Taverners Pub	Waitrose
Tesco	Waverly Park Holiday Centre
The Aqua	West View Holiday Cottage
The Birkdale	West Wight Alpacas
The Blue Crab	West Wight Holidays
The Chesnuts Hotel	Westbury Lodge
The Chestnuts Guest House	Westridge Golf
The Chicken Shed	White Horse Inn
The Clifton	Wightaway
The Crown	WightFibre
The Fitness Factory	WightLink
The Footprint Trust	Wight Karting
The Kebab House	Wight Karting
The Kenbury	Wight Location
The Lawns	Wight Media Services
The Leconfield	Windsor Carlton
The Miclaran Guest House	Wine Therapy
The Needles Landmark Attraction	Words & Stuff
The New Carnival Company CIC	World Leisurewear
The Oaks	Yarmouth harbour
The Old Smithy	Yoga with Emma
The Orchards Holiday Park	Zhik Store Cowes
The Royal Hotel	

Appendix II

Locations, dates and times of business community, public consultations

Ryde Castle	18th November	11am
Ventnor Towers	18th November	6pm
The Spinnaker	19th November	11am
Cowes Yacht Haven	19th November	6pm
Tapnell Farm	20th November	11am
Osborne House	24th November	11am
The Spinnaker	24th November	6pm
Newport Football Club	25th November	11am
IW Zoo	26th November	11am
Landguard Manor	26th November	6pm
Ryde Castle	27th November	6pm
Isle of Wight Zoo	30th November	11am
Newport Football Club	3rd December	6pm
Channel View Hotel	15th December	11am
Channel View Hotel	20th January	11am
Ryde Castle	21st January	11am
West Wight Sports Centre	9th February	5pm

Future dates

Ryde Castle	23rd February	10am
Channel View Hotel	23rd February	1pm
Ryde Castle	23rd February	5pm

Annual Tourism Conference

Gurnard Pines	2nd March	10am
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Appendix III

Questions presented to attendees at the business community, public consultations to stimulate conversations

How important is it that the island has a single body to coordinate and lead its tourism efforts?

What should be the priorities for that single body?

What do you think the key priorities are, which would help to grow the islands visitor economy?

Given the collapse in local government and other public budgets, how should that single body's work programme be funded? What alternatives are there?

What will make a real difference to levels of business and performance in the next 5 years?

What should VisitIsleOfWight be focussing on in the next 5 years?

If you had up to four million pounds to spend over the next five years, what key actions would you spend the money on?

You have heard the proposals for the DBID; the development of a five year Business Plan, agreed and funded by those businesses that benefit from the visitor economy. Bearing in mind that there is unlikely to be further public funding, do you think this is a good idea or do you have alternative suggestions as to how to pay for the priorities you have considered in question one?

Thinking about your own business, what would you expect as a return on your investment into a scheme such as a BID?