

Discovery + Research - *Phase 1*

The discovery phase is an ongoing process of **building and testing our understanding of the Isle of Wight** - its visitors, audiences, perceptions, competitive position and opportunities.

This evidence is being used **alongside strategy development**, helping us refine the emerging direction, challenge assumptions and identify where further research or insight is needed.

01. VISITOR AND MARKET LANDSCAPE

A valuable visitor economy with a **strong domestic core, high loyalty and expanding short-break growth.**

WHO IS VISITING?

2025: The overall visitor picture

- **Strong Domestic Core:** Hampshire & South East as main markets
- **Highly Loyal:** 71.7% visited in last 12 months; 7.5% first-timers
- **Day & Overnight:** Attracts visitors for short breaks and day visits
- **Wider Reach:**
Visitors also come from across the UK and overseas

Sources: Tourism South East Isle of Wight Passenger Survey, 2025; Isle of Wight Ferry Research, Q4 2025

WHAT'S CHANGING?

Shorter, more accessible trips are growing

Jan–Jun 2026 vs Jan–Jun 2025:

- +17% 1–3 night stays
→ **Short breaks are growing.**
- +1.2% Leisure day visitors
→ **Day visits remain resilient.**
- +1.2% Leisure overnight visitors
→ **Overnight demand is broadly stable.**
- +8.5% Average overnight visitor spend
→ **Overnight visitors are spending more.**

Source: Isle of Wight Passenger Survey, Tourism South East, Q1 & Q2 2026; comparisons with Q1 & Q2 2025.

Sources: Tourism South East Isle of Wight Passenger Survey, 2025; Isle of Wight Ferry Research, Q4 2025

WHAT DON'T WE KNOW?

- **Who could we attract?**
Our highest-potential future audiences and what they want.
- **Why don't they choose us?**
The barriers and how we compare with competing destinations.
- **What do they think of us?**
Current perceptions, associations and emotional response.
- **What would make them choose us?**
The reason to choose the Isle of Wight over the alternatives.

The Island has an opportunity to attract higher-value experiences and new audiences.
What would make someone who doesn't currently choose the Island, want to experience it?

02. VISITOR MOTIVATION AND BEHAVIOUR

People aren't just looking for things to do. **They're looking for time well spent.**

WHAT DRIVES UK BREAKS?

- 41%** Family / time with partner
- 31–38%** Getting away from it all / rest
- 24%** Connecting with nature
- 43–44%** Trying local food & drink
- 35–36%** Walking / hiking / rambling

Source: VisitEngland Domestic Sentiment Tracker, February 2024.

THE ISLAND'S NATURAL ASSETS

We already match many of the motivations driving UK travel.

- NATURE & COAST** Beaches · countryside · walking · wildlife
- ACTIVE OUTDOORS** Cycling · sailing · watersports · adventure
- FOOD & LOCAL** Independent food · producers · seafood · vineyards
- TIME TOGETHER** Family · friends · culture · events

2025 passenger research shows **44% of visitors visited at least one attraction**, up from 37% in 2024 — suggesting attractions remain an important part of the visitor experience, but are only one part of it.

Move marketing positioning from:

WHAT YOU CAN DO → WHY YOU'D WANT TO EXPERIENCE IT

This is the bridge into Island Life.

03. VISITOR PERCEPTION AND REPUTATION

The Island has strong emotional assets - but they aren't fully owned in the market.

Unspoilt

Strongest documented perception (2016 study) as uncommercialised & natural.

Authentic

2024 brand work identified authenticity, hospitality, & local voice as core assets.

Perception Gap

High repeat rates (71.7%) mask a lack of clear perception among potential non-visitors.

What We Know (Assets):

Unspoilt, Natural, Authentic, Different, Slower pace.

What Holds Us Back (Barriers):

Traditional "bucket & spade" stereotype, "not enough to do", ferry cost/inconvenience, limited awareness of offer depth.

What does this tell us?

****We know what the Island has been perceived as. We don't yet know precisely how today's potential visitor sees it.****

The research archive contains a 15,000+ respondent public perception study from 2016, plus the 2024 Designate brand work — but there is no recent dedicated quantitative study measuring current destination perception, consideration or sentiment.

This is a key priority for the new research.



Our digital channels have strong reach — but largely with audiences already familiar with the Island.

51.8K Instagram Followers | 717K Organic IG Views | 1.02M Facebook Post Views | 34.7K IG Reach

Source: Visit Isle of Wight Social Media Report, July 2026.

01 / WHO WE REACH

- Over-50s (strong engagement)
- Families (seasonal/holiday content)
- Local & South Coast catchment

02 / WHAT WORKS

- High engagement on experience-led content
- Places · Experiences · Food & drink · Seasonal moments · People · Video

03 / THE OPPORTUNITY

- Shift digital channels from information to desire generation.
- Grow awareness and consideration, not just engagement.

Strategy Shift: From: What’s on · Things to do · Places to visit
 To: **Why come · How it feels · Why choose Island Life**

Sources: VIOW digital and paid media reporting; Tourism South East visitor research; Isle of Wight Ferry Research 2025. Audience themes are indicative and reflect available reporting rather than a single audience study.

05. STAKEHOLDER AND INDUSTRY INSIGHT

The Island has a broad and diverse visitor offer,
but businesses need a stronger shared destination story.

Across conversations with businesses, tourism partners and industry stakeholders, consistent themes are emerging.

> A STRONG & DIVERSE OFFER

Coast · nature · accommodation · food · activity · culture · events · wellbeing

> DEMAND IS EVOLVING

Growing interest in experiences beyond the traditional summer seaside offer.

> THE EXPERIENCE IS COLLECTIVE

Visitors experience the Island through the places they stay, eat, explore and discover.

> VISIBILITY MATTERS

A need to grow awareness and give people stronger reasons to choose the Island.

THE OPPORTUNITY: Create a unified destination narrative
that bridges what the Island offers with why people want to experience it.

06. WIDER TOURISM AND TRAVEL TRENDS

Travel is changing - *and so is destination choice.*

VISITORS ARE LOOKING FOR MORE THAN THINGS TO DO

Meaningful experiences

Time that feels worthwhile

Nature & outdoors

Space, fresh air and connection to place

Authenticity

Local, genuine and distinctive experiences

Quality over quantity

Fewer, better experiences

A sense of place

Destinations with character and a story

Sources: VisitEngland Domestic Sentiment Tracker; VisitBritain Domestic Tourism: Latest Annual Results; VisitBritain 2026 Content Framework.

THE ISLAND HAS MANY OF THE RIGHT INGREDIENTS

NATURE

Coast · countryside · wildlife

ADVENTURE

Walking · cycling · sailing · watersports

FOOD

Local producers · seafood · independent food · vineyards

CONNECTION

Family · friends · culture · community

WELLBEING

Sea swimming · yoga · space · slower moments

The opportunity isn't to create more things to do.

It is to create a stronger reason to choose the Island *by bringing existing assets together.*

07. COMPETITIVE AND DESTINATION LANDSCAPE

Competing in a crowded market for distinctive coastal escapes.

<i>Destination</i>	<i>Core Brand Identity / Positioning</i>
CORNWALL	Coast · beaches · food · outdoor experiences · strong sense of place
DEVON	Coast · countryside · outdoor adventure · food · nature
ISLES OF SCILLY	Island escape · nature · tranquillity · remoteness
JERSEY	Island experience · coast · food · wellbeing · accessibility
AMALFI COAST	Iconic coastline · food · lifestyle · place identity

The Isle of Wight is competing in a crowded market for **coastal, nature and island escapes**.
Across the destinations reviewed, the strongest propositions are built around a **clear sense of place and a distinctive experience**, rather than a list of attractions.

Emerging strategic territory to test:

ISLAND LIFE | CLOSER THAN YOU THINK

08. STRATEGIC SYNTHESIS - WHAT THE EVIDENCE TELLS US

Turn what the Island already has into a reason people actively want to choose it.

1/ PEOPLE WANT TIME WELL SPENT

Connection, nature, escape, local experiences.

2/ THE ISLAND HAS A DISTINCTIVE CHARACTER

Unspoilt, authentic, natural, slower-paced - valuable, but not fully owned.

3/ THE OFFER IS BROAD. THE STORY IS FRAGMENTED

Adventure · coast · food · culture · family · wellbeing
Experiences exist, but are sold as separate items.

4/ THE BIGGEST GAP IS CONSIDERATION

Loyal base, but low consideration among non-visitors.

The Emerging Opportunity: Create desire before information.

VISITOR DATA → loyal, predominantly domestic audience

MOTIVATION → nature, connection, escape, experiences

PERCEPTION → unspoilt, authentic, different

SOCIAL → experience-led content drives engagement

COMPETITION → destinations increasingly own distinctive feelings

TREND → meaningful experiences and time well spent

Sources: Tourism South East Isle of Wight Passenger Survey, 2025–26; VisitEngland Domestic Sentiment Tracker; Designate brand work; VIOW social insight; competitive destination review.

09. RESEARCH GAPS AND NEXT STEPS

Priority 1: UNDERSTAND

Future Audiences & Perception

FOCUS:

Who could we attract? What do they want? What stops them? How are we perceived?

COMMISSION:

Robust audience, perception, & destination-choice study.

OUTPUT:

Key target personas, motivation mapping, barrier identification

Priority 2: TEST

Positioning & Proposition

FOCUS:

What makes us distinctive? How do we compare to competitors?

COMMISSION:

Competitive positioning & proposition testing.

OUTPUT:

Validated proposition, audience relevance, messaging hierarchy.

Ongoing: TRACK & LEARN

FOCUS:

Aggregate visitor data, digital analytics, sentiment, and stakeholder input.

OUTPUT:

Monitor how the market and audience evolve - alongside continuous refinement of the strategic vision.