

## Executive Summary

- 1.1. In the summer of 2024, Context Economics was appointed to carry out a Mid-Term Review of the Isle of Bute BID. The BID came into being in September 2021 and the study was therefore undertaken at the mid-point of Year 3, a timely point for the review.
- 1.2. The findings draw on considerable primary research, including an online survey of 44 levy payers (23% of the total), a small number of 1-1 business conversations, an in-street survey of 53 users of the BID-provided seating areas at Guildford Square and the Bandstand at Montague Street, and consultations with representatives from 6 stakeholder organisations.

### Levy Payer Views

- 1.3. Levy payers were asked their views on the three BID priorities of marketing and promotion, environment and image and business support. They consider the BID has had some success in relation to **marketing and promotion**, notably:
  - the Visit Bute website (+8 percentage points saying the BID has been effective compared to those saying it has not been effective);
  - off-island promotional activities (+9 percentage points);
  - the BID supporting events and festivals (+14 percentage points); and
  - on-island promotional materials (+21 percentage points).
- 1.4. There has been more mixed success with respect to **environment and image**. Almost as many consider the BID effective in improving Rothesay town centre's image as those who do not, although fewer say the BID has reduced empty shop units or worked with others to attract investment.
- 1.5. In terms of **business support**, the BID has been effective in networking events, but not in reducing business costs or acting as a collective voice for businesses.
- 1.6. Despite the mixed picture on achievements to date, levy payers are clear that the three **business plan priorities remain the key priorities**, for businesses and for the island.
- 1.7. **Improving the image of the town centre and improving the image of the island as a whole** are identified as the highest priorities. Marketing and promotion is considered to be of critical importance to the success of the island: off island promotion, events and festivals, Visit Bute website and social media.
- 1.8. **Levy payers report significant challenges**. These relate to high running costs, staff recruitment and attracting new customers. Businesses do not rank online attraction of customers so importantly, despite the recognised need to attract customers and footfall.

### Visitor and Resident Views of Outdoor Seating, Banners – and the Isle of Bute

- 1.9. The BID-provided outdoor seating brings positive benefits to the island. The **seating increases dwell time** in the town for 62% of visitors using the seating and half the resident users. It also brings economic benefits for the town: **almost one in four**

**visitors using the seating increase the amount of money they spend in the town** as a result of the outdoor seating, and one in seven resident users do so.

1.10. The outdoor seating also plays an important role in **increasing social interaction especially for residents**, with almost three in four resident users (73%) increasing social interaction, as well as for four in 10 visitor users. It is used for meeting shopping (higher for visitors), to meet friends and family and to rest and sit down. The seating is also used for or drinking things purchased locally.

1.11. The **Guildford Square banners provide important information, are clear and show the island in a positive light**. Almost all (98%) said the banners provide important information on things to do and see on the Isle of Bute, with almost three in 10 (28%) strongly agreeing. More than a third think they show the island in a positive light, rising to four in 10 of visitors thinking this. **The banners are more likely to make people go to an event or attraction**.

1.12. The top things visitors like and dislike about the Isle of Bute are:

**LIKES**

- 1) The scenery, countryside, beaches;
- 2) That it is relaxing, safe and quiet
- 3) Outdoor pursuits, walks, cycling.

**DISLIKES**

- 1) Shop opening times, lack of shops
- 2) Bars, restaurants, eating out options
- 3) State of some of the buildings and need for care and attention
- 4) Ferry reliability and cost

1.13. The top things residents like and dislike about the Isle of Bute are:

**LIKES**

- 1) Its friendliness
- 2) Scenery, countryside, beaches
- 3) Relaxing, safe and quiet.
- 4) Sense of community & good neighbours

**DISLIKES**

- 1) Lack of shop choice (grocery), lack of shops
- 2) Ferry reliability and cost
- 3) State of some of the buildings and need for care and attention

1.14. **One third of residents think the island has improved over the last five years**, compared to 11% who think it is not as good.

**Stakeholder Feedback**

1.15. There is broad consensus that **the BID is focusing on the right things**. Stakeholders agree that promoting the island on and off-island remains key to success. Environment and image also remain a key priority for consultees, including the criticality of first impressions and the state and repair of buildings. The BID should support other organisations seeking to address some of these challenges. Supporting businesses also remains a key priority, notably collaboration, both businesses and between businesses, the Third Sector and the public sector.

- 1.16. Stakeholders believe the BID should celebrate its townscape improvement achievements more strongly. The BID should also continue to make visible townscape improvements, which demonstrate action and build critical mass.
- 1.17. The BID should also seek to support non-tourism sectors more effectively. For consultees, tourism 'is not the only sector in town' and the BID should seek to be mindful of ways to support businesses in other sectors. That said, with respect to tourism, the BID should seek to increase the **quality** of offer for visitors, from the variability of the accommodation offer, to experiential tourism, shop opening times and the quality and breadth of the restaurant offer.

### Overall Conclusions

- 1.18. In summary, and to conclude, the **BID strategy remains appropriate** in terms of its focus on marketing and promotion, environment and image and business support.
- 1.19. The **balance** between the three priorities, and the **focus within** these three broad themes, however, may need to be refined over the remainder of the BID terms, with specific efforts focused on:
- Continuing to improve the image of the town centre / island;
  - Continuing to market and promote the island effectively, utilising the Visit Bute brand within the BID's umbrella;
  - Working to support businesses – including helping businesses to reduce costs and improve profitability through attracting new markets and customers, including online and supporting businesses via social media; and
  - Attracting more investment into the town.
- 1.20. At the mid-term stage, it is clear the BID has been effective in some areas to date, notably in relation to marketing and promotional activities, and some Rothesay town improvements, although the **BID has not as yet done as much as it could have done** under some of the themes to satisfy businesses / levy payers.
- 1.21. The work of the BID in relation to outdoor seating and banners are very positively received. The BID should therefore continue to focus on **visible and demonstrable actions** that benefit the island. There are clear messages from visitors and residents about the positive of the Isle of Bute, and the negatives.
- 1.22. The BID needs to work **more effectively with partner organisations and foster collaboration between businesses**, building on recent progress in this area.
- 1.23. There needs to be a degree of **realism about what the BID** can achieve with modest resources, whilst at the same time continuing to demonstrate value for levy payers. Part of this is **communicating the benefits of the BID** to more businesses and partners.
- 1.24. As an extension of the above, there is a need to develop **a monitoring and evaluation framework** to assess the ongoing impact of the BID.