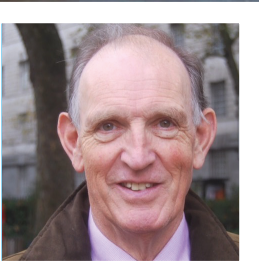




islands
partnership

**ANNUAL REPORT 2019/20 &
Membership
Prospectus
*2020/21***



Foreword

Andrew Sells, Chairman,
Islands' Partnership

It is not possible to reflect on the year ended 31st March 2020 without framing it in the context of the changes effected by the ongoing global COVID19 pandemic which emerged as a serious threat in the last quarter. Leaving that aside for a moment, 2019/20 was a remarkably normal and successful year for the tourism visitor economy on Scilly. On the other hand it was a year of change for the Islands' Partnership.

Last year I wrote that our priority was to secure greater financial resilience for the IP. IP's work is undertaken because of local partnership and member funding, with additional project and commercial income. I am pleased to report that we concluded the 2019/20 year with a modest financial surplus – the first time IP has recorded a profit for several years. This outcome was in no small part because Penzance Helicopters became a strategic partner of the IP during the course of the year – joining a

group comprising the Isles of Scilly Steamship Group, Tresco Estate and the Duchy of Cornwall with whom the IP enjoys strategic partner agreements. 2019/20 was the first year of three-year partnership agreements to March 2022 with each of our four strategic partners and these strong relationships reflect a commitment to common purpose across the visitor economy for sustainable growth as outlined in our destination management plan.

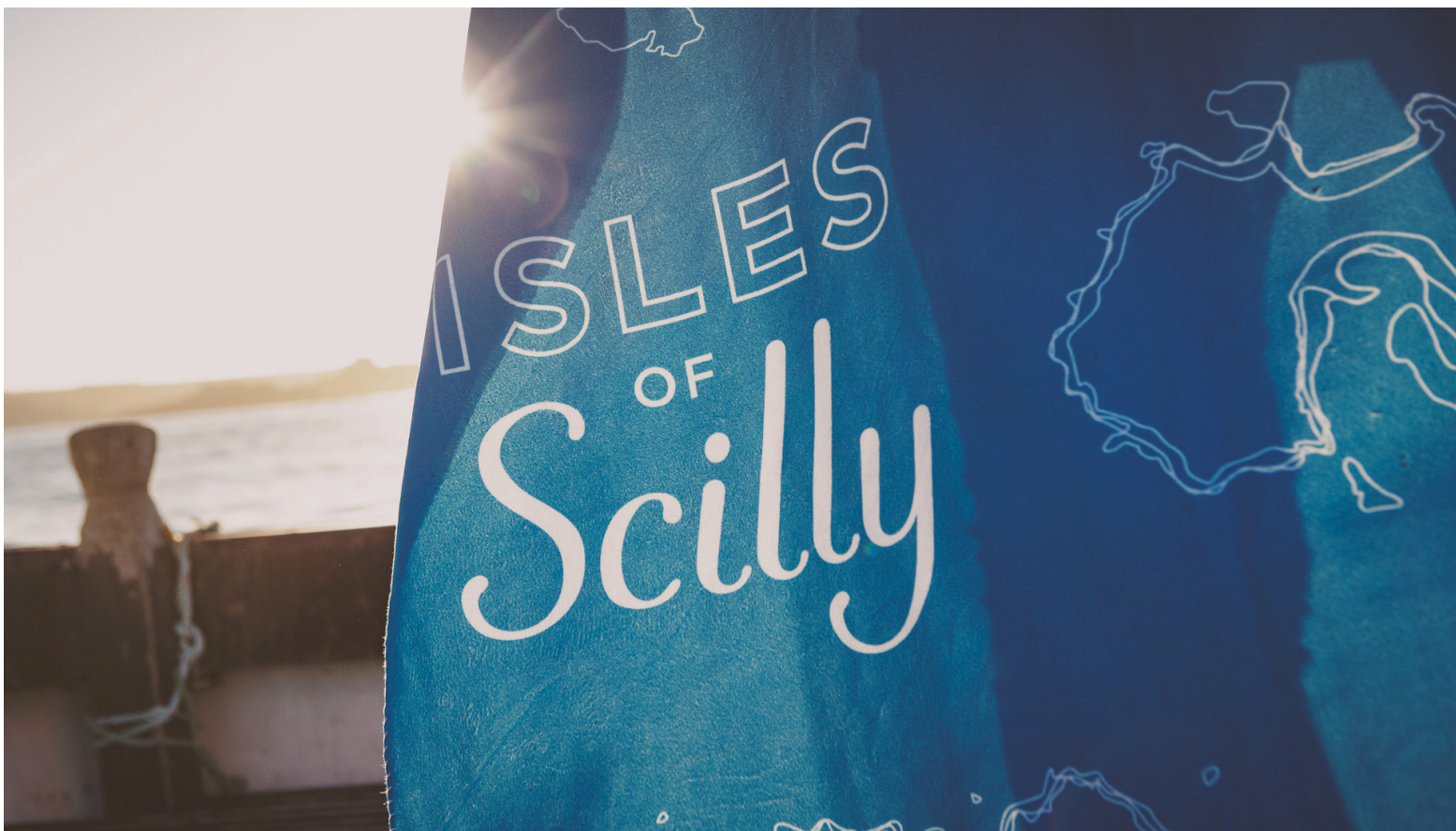
There has been substantial change to the IP team during the year. As I reported last year, David Jackson left his role as Executive Director in July 2019. He left behind an excellent strategic framework for Scilly as a visitor destination outlined in destination management and associated action plans. During the year we recruited Nick Bond as our new Executive Director and tasked him to deliver the strategic objectives and actions agreed with our strategic partners in the DMP.

For a number of reasons it has not been an easy year for him – let us hope the coming months are easier. The board and I constantly urge Nick and his team to engage with IP members as much as possible, and I hope you have had the opportunity to meet the team.

Turning to the current financial year the government's actions to protect the NHS and society generally prevented the visitor economy from operating from the end of March to early July. No visitors were able to travel to Scilly during lockdown and several well-established annual events including the World Pilot Gig Championships, Walk Scilly and the ÖTILLÖ Swimrun event were cancelled. It is impossible to recover those lost bed-nights but there is tangible enthusiasm for an extended season and this is of course one of the ambitions of the destination management plan. We must grasp the opportunity it presents. Demand for Scilly from the domestic visitor market is high, whilst opportunities for traveling abroad have been reduced and we are experiencing a unique opportunity to introduce new visitors to the joys of Scilly.

I am most grateful for the continued support of our Strategic Partners, the common purpose we enjoy with them, and our joint efforts to work together to develop an even more successful visitor economy - for the benefit of our members and the islands generally. Coronavirus does not fundamentally change our strategic growth objectives, rather it presents opportunities for new business from new domestic audiences. This year I know has been an exceptionally difficult year for many local businesses, and the IP has endeavoured to be as supportive as possible. We are resolutely committed to working together with members for a better future.

Finally I would like to thank all our staff, whether full time or part-time, for their commitment and hard work during difficult times, and to thank all our board members who give so generously of their wisdom and time. On that subject, we are looking to expand the board and bring in wider and more diverse experience and I hope more members will put themselves forward over the next year as potential board members. I look forward to seeing you at the forthcoming AGM in October whether it is in person or via Zoom.



IP BOARD OF DIRECTORS



Andrew Sells
Chairman



Robert Francis
Vice Chairman
Star Castle Hotel & Holy Vale Vineyard



Jon May
Sandpiper Apartments & Shop,
Peninnis Farm & Lodges



Euan Rodger
Tanglewood Kitchen



John Peacock
St Agnes Boating



Luke Humphries
Duchy of Cornwall



Nick Halliday
Tresco Estate



Sharon Sandercock
Isles of Scilly Travel

OUR STRATEGIC PARTNERS



WORKING IN PARTNERSHIP WITH





Continuity and Change

Nick Bond, Executive Director,
Islands' Partnership

It was all change for the Islands' Partnership's executive team in 2019, nonetheless from the point of view of the current year and the disruptions that the COVID-19 pandemic has caused in 2020 - the programme of work undertaken by the team was as per plan, and measured against previous years the visitor economy performed as expected. Our focus is on the future and we are informed by the predictable features of business last year and by the unpredictable things that have happened this year. I cannot reflect on last year without this context – 2020 has not been kind to small businesses that rely on a normally functioning visitor economy but there are opportunities for Scilly and every reason to be confident in the future.

Apart from obviously being so drawn to live and work in this unique place, one of the reasons I was so keen to lead the Islands' Partnership was a clear view that IP had invested its expertise and capacity so wisely over the last several years in the

plans necessary for sustainable tourism growth in Scilly. We have a clear set of objectives determined and agreed with our major stakeholders, members, and partners.

Earlier this year the equivalent body to the IP in the Isle of Man launched a new website – we understand that the brief was (entirely sensibly) to copy Scilly's. Visitislesofscilly.com performs extraordinarily well when measured against the competition and proof that good decisions about its development were made last year and in the previous year are demonstrated by measurable metrics. Post easing lockdown restrictions this year the performance of coastal destinations websites are up against the equivalent period last year - measured in sessions the uplift is on average about 20% for coastal destinations in the first 3 weeks of August 2020; traffic to our website was measurably quicker to up-lift and increased much more than the average – it was up 84% in the same period!

In the last quarter of 2019/20, the website's online booking functionality was dramatically improved; the destination management system now integrates directly with a tremendous choice of property management systems.

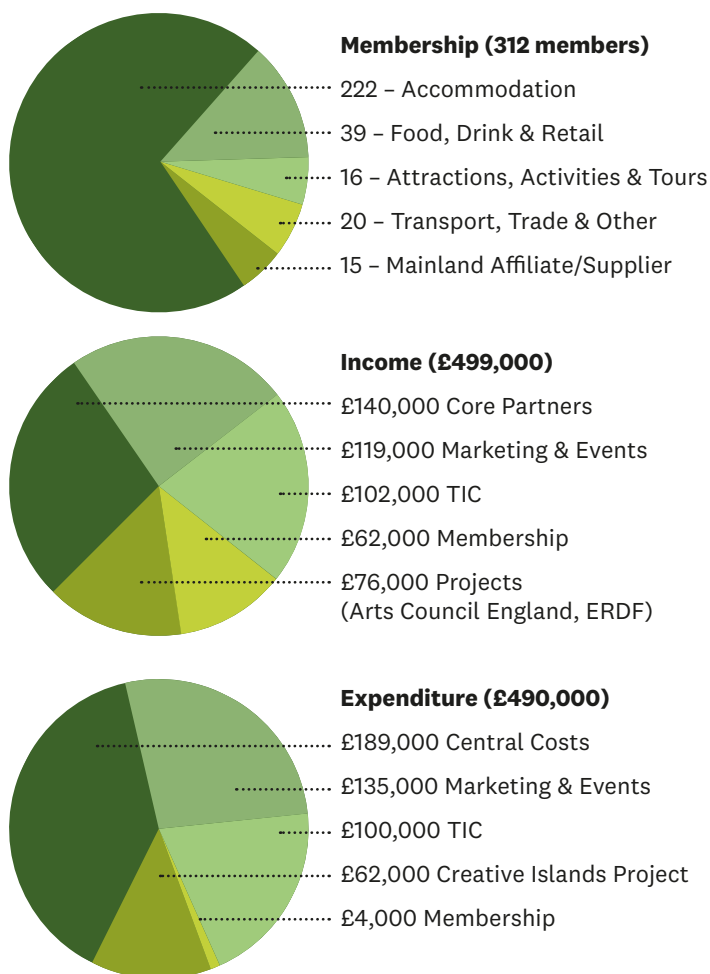
These website performance measures and product developments as well as evidence of recent market behaviour show that we have the destination product, resources, and capacity to grow the visitor economy. There appears to be domestic market demand for season extension – IP will communicate content about the advantages of visiting Scilly throughout the year and we encourage our members to continue to respond to opportunities to grow the value of the season and stay open for as long as it is profitable to do so.

We are focussing our capacity on digital content and on working with the media – compelling story content from members is a vital component of this approach. Traditionally we have cut through versus our competitors by investing in market leading print; and this is proven to work – we are not producing a 2021 guide primarily because of its cost to advertisers this year. We distributed 25,000 copies of the current 2020 guide in the last quarter of the 2019/20 year.

Work on advancing the Scilly Standard quality accreditation scheme was postponed but it is core to our plans for advancing Scilly's destination brand and sustainability. With fewer staff resources than normal in the busiest part of 2019 the IP delivered an enhanced event programme comprising competitive swimrunning, walking, food & drink, and arts & culture. The Creative Islands project was deemed to be such a success last year that it is unique amongst its peer projects nationwide in securing additional Arts Council funding, and with ERDF investment this year (and into next) valuable cultural development project work is ongoing.

IP began investing in professional PR consultancy again in 2019 and there can be no doubt as to the value it generates for the destination brand; the schedule of published and forthcoming coverage, press trips and press meetings is a name-check of the senior travel editorial staff of household name media channels.

2019/20 IN NUMBERS



The team at the Tourist Information Centre helped tens of thousands of visitors and prospective visitors in 2019 including people who were briefly stranded when there was a mechanical failure on the Scillonian III. We receive numerous letters of congratulation and thanks for the service provided by the staff of the TIC and thank our members for continuing to support us in undertaking this most valuable of visitor services.

2019/2020 Highlights

EVENTS

- IP invested and contributed to a full programme of events in 2019/20. Our financial support and leadership were instrumental in bringing the ÖTILLÖ World Swimrun series to Scilly in June 2019.
- IP hosted successful Walk Scilly events in spring and autumn 2019 – adding value to the shoulder seasons - as well as the Taste of Scilly Festival.
- More than 2,500 people participated in a programme of 80 artistic and cultural events during the Creative Scilly festival.



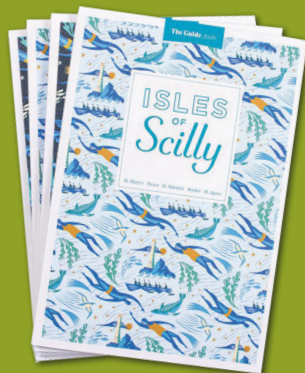
DIGITAL

- Visitislesofscilly.com is the go-to portal for visitors – **400,000 users** had an average session time of 5 minutes and made **2.3M page views** - generating thousands of booking enquiries for members.
- Online booking functionality continues to advance the islands' adoption of booking systems and real-time availability management; property management system integration has been significantly improved in 2019/20.
- Our social media audience has risen to nearly **40,000 followers**, with significant growth and engagement via Instagram.
- Our email database remains a valuable and effective marketing asset with up to **84,000 active subscribers** in the last quarter of 2019/20.



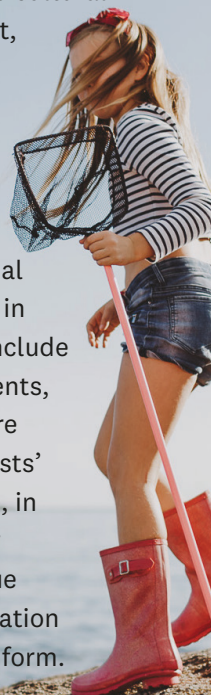
MARKETING

- 25,000 copies of the 2020 Isles of Scilly guide were distributed nationwide in the last quarter of 2019/20 from early in the New Year.
- Successful digital content marketing and media - helping to drive new visitors and retain loyalty.
- Continued investment in professional, on brand photography and video content.
- Representation at overseas and travel trade exhibitions.



CREATIVE ISLANDS

- 2019/20 was the second of the two-year Creative Island's project to develop cultural activity, opportunities, engagement, partnerships, profile, education, innovation, and identity on Scilly.
- The project's tangible successes in all those areas in 2019/20 have allowed us to secure unique additional national and international funding for the project to continue in the current year. Project success include new cultural performances and events, educational opportunities in theatre and curation for young people, artists' residences – resulting, for example, in local collaboration to produce new glasswork on Holgates Green, venue development feasibility and publication of Walking Stories content in book form.



2019/2020 Highlights

VISITOR SERVICES

- During the 2019 season the TIC undertook more than 40,000 customer enquiries – looking after visitors face to face on the phone, by email and on social media.
- This included helping many of the passengers stranded when the Scillonian was out of action in August 2019 - and as weather affects transport operations the TIC's role remains vital.
- TIC staff and volunteer Welcome Ambassadors met, greeted, and assisted thousands of the visiting cruise ship passengers who arrived at St. Mary's quay – encouraging them to visit retail and hospitality businesses and to come back to Scilly.

MORE THAN
40,000
INQUIRIES



PUBLIC RELATIONS AND MEDIA

- IP invested in professional PR services undertaken by Victoria Bond throughout the 2019/20 financial year – securing money cannot buy print, digital and broadcast media coverage.
- Working with IP members, Victoria held press meetings and facilitated visits with editors and writers from media brands including the Times, Guardian, Daily Telegraph, Daily Mail, i, Conde Nast Traveller, Time Out, Stylist and many more – leading to an extraordinary value in advertising value equivalent content.



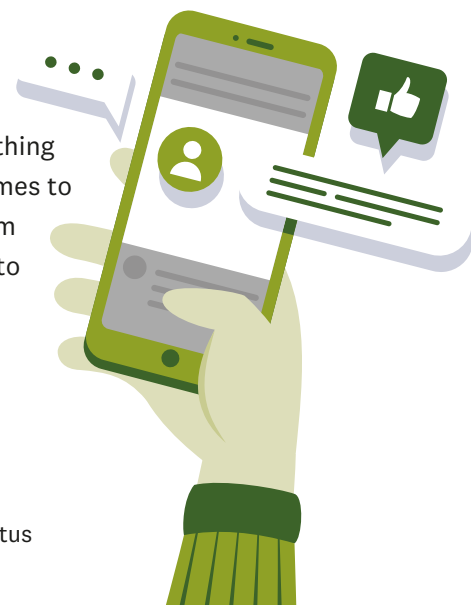
STRATEGIC LEADERSHIP AND INFLUENCE

- The Action Plan of the Destination Management Plan remains the blue print for IP undertaking work with its strategic partners for the sustainable future of the Islands' visitor economy.
- The IP continues to champion the islands' tourism industry, providing leadership and representation at local, regional, and national levels.
- We continue to invest in research and market intelligence.



INDUSTRY SUPPORT

- IP constantly undertakes to act as a conduit to business services, funding opportunities, education, advice, and opportunities for its members – working in partnership with other organisations and service providers.
- Supply Scilly, in February 2020 was a trade sell-out, with excellent feedback from suppliers and local businesses.
- We encourage our members to seek our advice on anything from quality schemes to IT queries and from business support to regulatory issues.



Membership



REMEMBER...

The Islands Partnership is a not-for-profit organisation and every contribution made by businesses on the islands is spent on growing the value of Scilly's visitor economy.

HOW DO YOU BENEFIT?

PROVEN MARKETING CHANNELS

- Our website visitislesofscilly.com is the official destination website for the islands and receives **over 1/2M visitors a year**. Accommodation is the second most visited section of the website, after the home page.
- Our members receive up to **10,000 visits** to their website listings on our website alone.
- We have a combined social media following and email database of **over 100,000** fans of Scilly and communicate with them regularly, including opportunities for you to advertise your business directly.
- We are responsible for much of the press and media coverage for Scilly – we feature only member businesses who then benefit directly from profile in the resulting coverage.
- We have a presence at travel trade shows and events and represent only member businesses when selling our offer to tour operators and other trade buyers.
- Our members have access to photography, video content, branding and marketing assets which complement members' own brands with a recognisable Scilly destination identity.

ACCESS TO DATA AND THE LATEST RESEARCH

The IP invests in market research and intelligence to ensure we know who our visitors are, where they are from, their preferences and attitudes to Scilly. This insight, together with figures for the number of visitors coming to Scilly and how much they spend etc. is available to members to help inform your own plans.

ACCESS TO TRAINING, BUSINESS ADVICE AND INDUSTRY NEWS

The IP facilitates training sessions and access to business support on the islands. We offer these sessions to members as a priority, or at a reduced or nil cost. We also issue regular members' newsletters, which in addition to official What's On information contain useful news, information and opportunities for member businesses.

HOW DO THE ISLANDS BENEFIT?

EVENTS

The IP supports organises and hosts events on and for the islands that help drive new visitors, particularly in the shoulder seasons. The event programme was interrupted in the 2020 season but plans for future ÖTILLÖ, Walk and Wild Scilly, cultural and food and drink events run or funded by the IP will see them return and grow.

PROMOTION

However big or small your business, when signing up to be a member of the IP, you are automatically buying into a programme for marketing Scilly worth over £200,000. Working together on this partnership approach to communicating the benefits of the destination is crucial to the visitor economy and it can only take place with all our members' support and contribution.

TOURIST INFORMATION CENTRE

With no public funding of the core operational costs of the TIC, support from our members is vital to ensure the continued operation of the TIC for the benefit of visitors and businesses.

UNLOCKING ADDITIONAL FUNDING

Every £1 we receive in membership fees contributes to leveraging five times as much additional project income – our membership base is the critical foundation for the outcomes of our work.

FLYING THE FLAG FOR TOURISM

Our small team champions the tourism visitor economy on Scilly and works with colleagues and partners regionally and nationally. We fly the flag for Scilly at every opportunity, making sure the islands' interests and its vital economy are represented and supported.

SUPPORTING THE LOCAL ECONOMY

Tourism visitor spending is the core of the Scillonian economy. Our work contributes to visitor retention and attracts new visitors; the money visitors spend directly with visitor facing businesses creates secondary local expenditure across the entire island economy – its services and trades. More higher spending visitors benefits and sustains the whole of our economy.

Looking Ahead...

Our strategic priorities and work programme for the 2020/21 year ahead include:

- Season extension activity – there is strong evidence of high domestic market demand and we are working to encourage businesses to open, supported by content marketing, media communications and events to grow the visitor economy throughout the year.
- Build on the success of the visitislesofscilly.com website – further improving online booking functionality, content marketing and remarketing opportunities.
- Continue the Creative Islands project - working with local, regional, and national partners to develop the cultural strategy for Scilly and deliver more new cultural benefits for the islands. We have secured funding to co-ordinate a partnership that will assist in shaping plans for the future of the Isles of Scilly Museum. We will take forward work on artist-led commissions, continue to host cultural events and facilitate business opportunities for local artists and creative businesses.
- Advance a vision for a local business assessment scheme for Scilly which recognises the special characteristics of our members Scillonian identity, character, culture, and service.
- Ensure that the Tourist Information Centre and related IP led visitor services continue to provide a professional and effective marketing and communications platform for members and advertisers and a valuable service for visitors.
- Work as a constructive member of the Islands' Transport Board to provide strategic input to the islands' transport agenda and with common purpose with strategic partners, transport operators and infrastructure owners.
- Continue to work in close partnership with the Smart Islands Partnership and the Isles of Scilly Wildlife Trust to encourage businesses and visitors to adopt sustainable, low carbon practices to protect and preserve the unique environment on which we depend.
- Provide sector and industry leadership, acting as the spokesperson for the islands' visitor economy, providing strategic insight and input on matters affecting or impacting Scilly's visitor economy.



Marketing Opportunities

We want to help you market your business. Our marketing and advertising opportunities provide businesses with proven reach and return.

EMAIL MARKETING

The size of our customer database has grown significantly – more than 84,000 contacts have signed up to receive news and offers from Scilly.



We regularly send our contacts emails with reasons to come to Scilly; each newsletter is the subject of a content marketing plan and offers opportunities for member content.

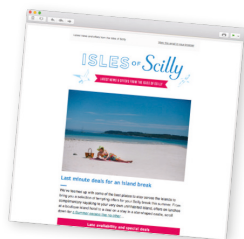
Open rates for our emails are much higher than industry averages at around 30%.

VISITISLESOFSCILLY.COM

Our website is exactly where it needs to be in Google search results:

1st for - Isles of Scilly, Isles of Scilly accommodation, Isles of Scilly things to do, Isles of Scilly places to eat, Isles of Scilly B&B, Isles of Scilly cottages, Isles of Scilly attractions etc. This is result of content and the underlying search engine optimisation benefits of the Simpleview platform.

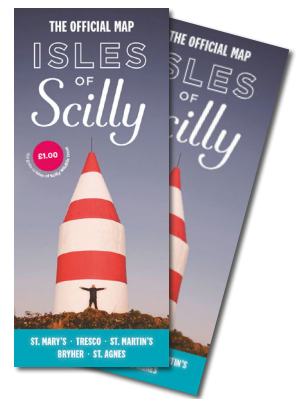
The website is used by 64% of all staying visitors and 76% of first-time visitors use it when planning and booking their visit to the islands.



POCKET MAP

Our popular on-island Pocket Map was improved with much more information about things to do and places to eat and drink.

There are good stocks of the current edition and a new version will be designed and printed as soon as it is needed – In these uncertain times, the Pocket Map Guide will next be reviewed in March 2021. The guide is incredibly popular with visitors in getting around and planning their days out.



TOURIST INFORMATION CENTRE

COVID-19 has meant there have been fewer visits to the TIC in 2020 than in a normal season, when footfall averages around 45,000.

The TIC communicates with a vast number of visitors in person, on the phone, by email, through social media, What's On and Things to Do sheets.



PUBLIC RELATIONS AND THE MEDIA

Press trips and PR activities arranged by the IP lead to extremely valuable print, digital and broadcast media coverage of Scilly. In almost every case, the accommodation the journalist stays in, the places they visit and the experiences they enjoy appear in their stories.

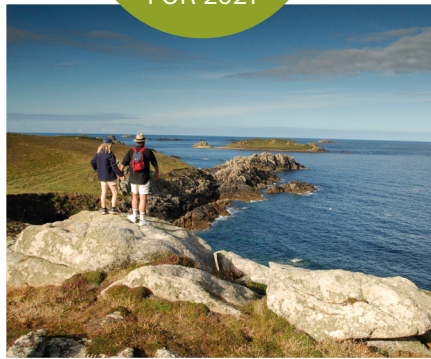
IP employs professional PR resources and we are working hard to secure new coverage to highlight and reinforce our product strengths to new and existing markets all the time.



REINTRODUCING
A PROGRAMME
OF EVENTS
FOR 2021

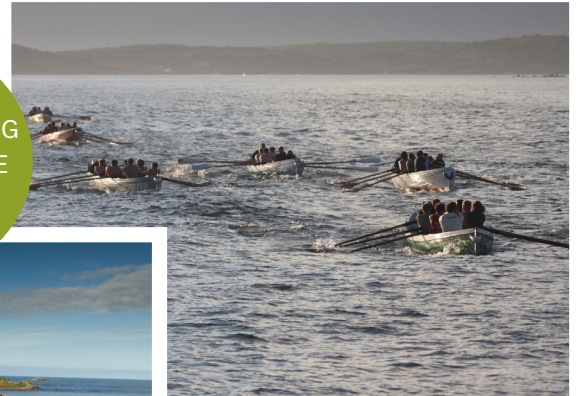
EVENTS

Events were cancelled in 2020 because of COVID-19 – the event programme will be reintroduced to include Walk Scilly, Wild Scilly, ÖTILLÖ, Taste of Scilly and Creative Scilly with opportunities to get involved in events programmes and related marketing activity.



CONTENT MARKETING

The IP delivers marketing content planned around the calendar - raising awareness of seasonal and product benefits and responding to consumer buying behaviour. We also work with partners to undertake tactical promotions. This approach means we need to work closely with members to create story content and highlight product benefits which resonate with our market.



Joining the Islands' Partnership is easy...

Contact our team by email, phone or by post and we can share the details and advantages of becoming a member. If you are on the islands, please make an appointment to meet us to discuss the benefits of membership.

enquiries@islandspartnership.co.uk

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