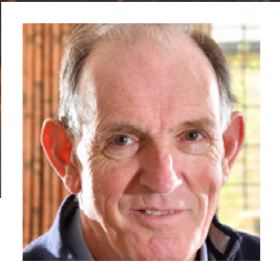




islands
partnership

ANNUAL REPORT 2020/21 &
**Membership
Prospectus**
2021/22



Foreword

Andrew Sells, Chairman,
Islands' Partnership

As I write in August 2021 demand for domestic holidays is extraordinarily high and Scilly is enjoying a remarkably busy season. The end of the 2020/21 was the conclusion to my second full year as Chair of the Islands' Partnership. It was an unusual year, starting in a national lockdown which delayed and contracted the visitor season. There were clear risks in the economy – none of us was able to predict the unfolding impacts of the pandemic and normally reliable cash forecasting was fraught with unknowns. IP reacted prudently, focussing on supporting the visitor economy, supporting our members, and mitigating financial risks. Not unusually for a not-for-profit company IP was exposed because of its lack of financial reserves. Like many businesses we benefited from emergency initiatives implemented by the government including the destination management resilience fund – a bespoke grant for our sector; you will note the operating surplus at

the end of the year - we have introduced a level of financial resilience which was otherwise missing. Turnover, income and spend were much less than in the last several years – the key differences being sales and costs incurred operating the tourist information centre and the decision, we reached in consultation with members, not to produce a printed visitor guide.

Throughout the uncertainties of the past year, we enjoyed the continued strong and collaborative benefits of working with our strategic partners - the Isles of Scilly Steamship Group, Tresco Estate, the Duchy of Cornwall, and Penzance Helicopters - marketing the benefits of visiting Scilly to new and existing audiences. This unusual year was also the second of our current term of three-year strategic partnership agreements. No doubt you will share my keen appreciation of the way those same partners have collaborated in the mutual interest of the islands' sustainability – securing government investment

in maintaining lifeline transport services during the worst of the pandemic and in the partnership with a broad coalition including the Council of the Isles of Scilly's leadership, our MP Derek Thomas, local businesses, Cornwall Council and the Cornwall and Isles of Scilly LEP around the bid for marine asset replacement and quay infrastructure.

IP is unusual versus its peers in not receiving direct investment from the local authority toward its core operational costs, nonetheless it enjoys an unusually collaborative working relationship with the Council of the Isles of Scilly – rejuvenated by new executive leadership from Paul Masters and his team. The council is very clear about its strategic priorities, and these include such areas of mutual interest as the potential to develop a new museum. IP led a museum feasibility study, started in the last quarter of the year past with investment from project partners – the Council, Duchy, and museum trustees. The key to advancing our common interests in realising an ambition for a new museum is in partnership with the Council and other stakeholders to unlock and deliver against grant funding opportunities.

At the Islands' Partnership AGM in October 2020, we agreed to increase the number of company directors. James Francis, Zoë Julian, Amy Langdon, and Sarah Mason joined the board. These appointments mean all 5 islands are represented by a resident director. The IP works to benefit the whole of the economy on Scilly and Zoë Julian is a great champion for this focus. She also brings expertise in product sales to domestic markets – shipping flowers directly to fans of Scilly. The appointment of James Francis to the board improves representation of serviced accommodation priorities and needs. Amy Langdon runs a self-catering property business and was employed at IP several years ago – she brings valuable sector knowledge and business engagement insights. Sarah Mason has since resigned from the board, having left her role leading the Wildlife Trust. The IP has common purpose with the Wildlife Trust in Scilly's environmental sustainability, and we look forward to developing these interests with a newly appointed chief executive.

Robert Francis and Sabine Schraudolph left the board in 2020 after both provided a great many years of dedicated service. Of course, we continue to enjoy excellent relationships with Robert in his capacity as Leader of the Council of the Isles of Scilly and his business interests – Sabine is pursuing new opportunities in her native Germany.

Robert's departure from the board made the role of Vice-Chair vacant and the board agreed to my proposal for two co vice-chair roles. These were appointed to Luke Humphries and Euan Rodger – both of whom offer regular direct support to the executive team led by Nick Bond.

The 2020 AGM was held on Zoom - I expect to meet members in a more sociable setting this autumn.

Appointments to the board reflect IP's commitment to expert insight into our members' and visitors' needs; the same applies to recruitment in the executive team. Will Lethbridge was recruited to the role of business support coordinator in the summer of 2020. Will is a communicator – a journalism graduate who has worked in broadcast media and in major event operations and, like many of our members, he runs a small self-catering property business. Speak to him and you will find he is informed by a spirit of genuine mutual interest in success for your businesses and for Scilly as a whole.

During the pandemic businesses across all sectors have focussed on recovery strategy. Restrictions to international travel have increased domestic market attention on local destinations and Scilly has benefited from that interest. The priorities outlined in the destination management plan for Scilly remain strategically correct for recovery and future growth – especially the headline priorities - product and service quality, value from an extended season and a transport infrastructure which supports increased capacity in the summer and winter.

IP BOARD OF DIRECTORS



Andrew Sells
Chairman



Euan Rodger
Co-Vice Chairman
Tanglewood Kitchen



Luke Humphries
Co-Vice Chairman
Duchy of Cornwall



Amy Langdon
Atlanta, Glenhope & Glenhope High
self-catering cottages & Meneth &
Kelyn-Mor chalets



James Francis
Star Castle Hotel
& Mermaid Inn



Jon May
Sandpiper Apartments
& Shop, Peninnis Farm
& Lodges



John Peacock
St Agnes Boating



Nick Halliday
Tresco Estate



Sharon Sandercock
Isles of Scilly
Steamship Group



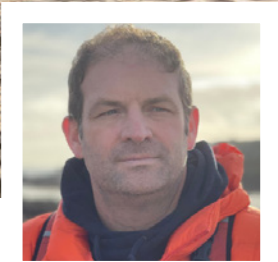
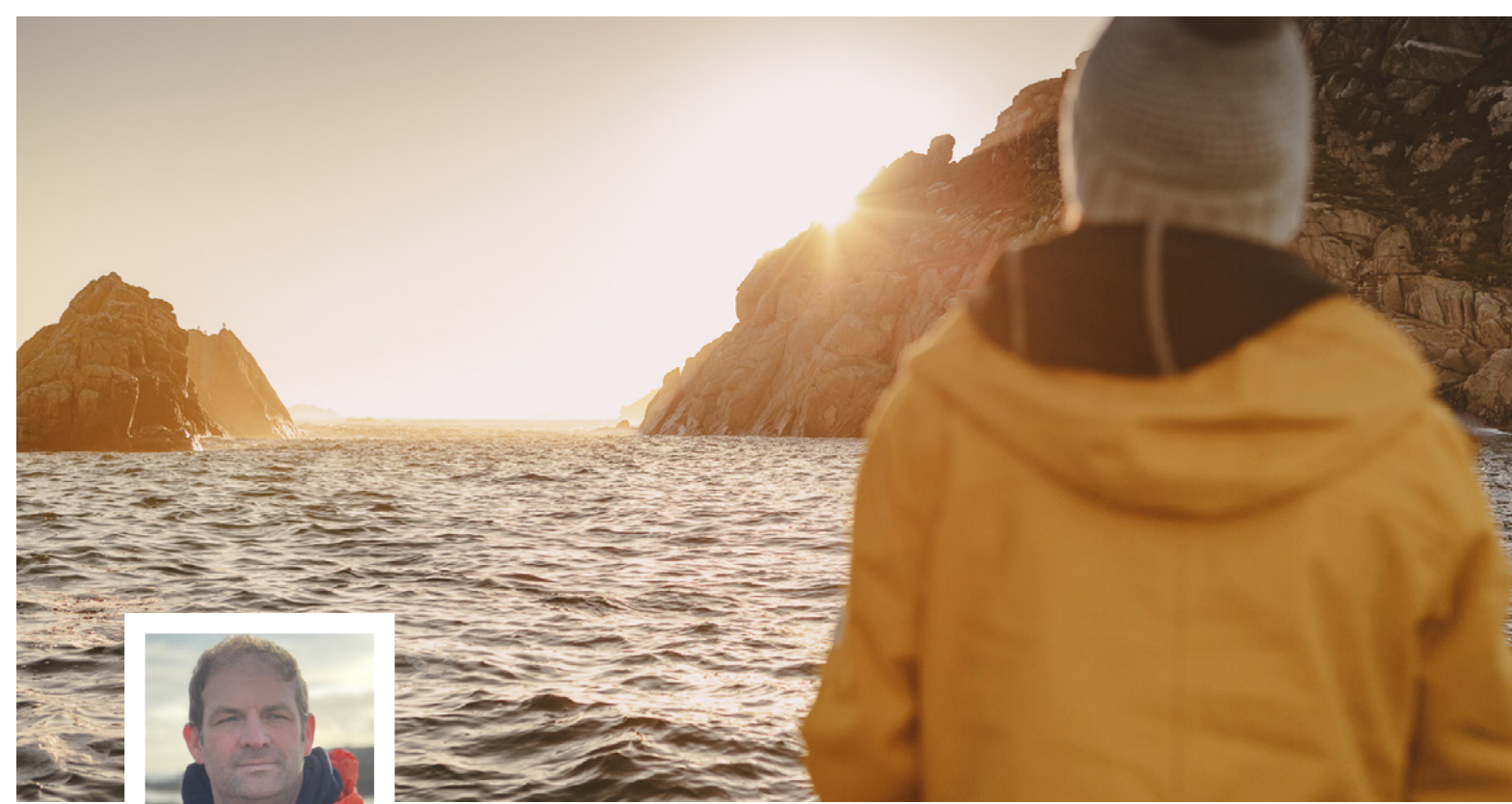
Zoe Julian
Scilly Flowers & Churchtown
Farm Cottage & Apartment

OUR STRATEGIC PARTNERS



WORKING IN PARTNERSHIP WITH





Looking forward from a year disrupted by the global pandemic

Nick Bond, Executive Director,
Islands' Partnership

The year April 2020 to March 2021 started and ended in national lockdown. After the first national lockdown was lifted in July 2020, regional markets were affected by extraordinary local lockdowns and then by a system of regionally tiered restrictions in the Autumn. In December there was a second national lockdown which was lifted for Christmas. In the New Year a third national lockdown was imposed and remained in place throughout the last quarter of the financial year. A schedule of lockdown easing started in March 2021 based on the outcomes of the national vaccination programme.

Within the constraints applied by the government to control the pandemic domestically, international border controls and restrictions on international travel, the domestic market response was of high demand for holiday accommodation in England – particularly in coastal and rural destinations. Visitors were able to travel to Scilly on holiday during the period early August to early November 2020 and they were certainly enthusiastic to do so.

In 2020/21 the restrictions imposed to control the pandemic significantly decreased total visits and spend against a normal year, but the conditions demonstrated high consumer demand for what we offer to visitors and the appetite to visit Scilly was raised.

The social distancing and business capacity restrictions which were in place made most social and sporting events impossible, and normal features of the events calendar were cancelled. Nonetheless - working with can-do walk leaders prepared to take a risk - IP facilitated a Wild Scilly event programme for the month of October 2020.

An event guide produced for Walk Scilly in April 2020 did not find its audience because the event was cancelled, but a new map guide has found a new audience keen to get up to speed with in-the-know Scilly regulars. Following member feedback for us to find a way (commercially and fairly) to increase the practical listings content in the map guide, especially for places to eat and drink on off islands I'm pleased that we produced a new version of the map with more comprehensive and practical content. This was the outcome of our members informing the plan; the same rule applied to the visitor guide wasn't such an easy call for the team, board, and me to make. The decision not to produce the guide was ultimately informed by the high cost of producing and distributing it; with hindsight we made the right decision and undertook more efficient member investment. Writing this in August 2021, I can tell you that sessions on visitislesofscilly.com had fallen versus the previous year in the first seven months of 2020 but grew to by far their highest ever level in the equivalent period in 2021.

| Year – comparative period | Website Sessions |
|---------------------------|------------------|
| January – July 2019 | 421,000 |
| January – July 2020 | 357,000 |
| January – July 2021 | 569,000 |

Consumer use of visitislesofscilly.com is different to that of equivalent websites in other destinations. A much higher proportion of sessions and page views on our website is on the accommodation pages of the site than is the norm in other British destinations. More than half of all the 1.6 million page views of visitislesofscilly.com in the period 1st November 2020 to the end of May 2021 were on the accommodation section.

So, where our peers are probably counting lots of local people looking at shopping, dining, and cultural opportunities, we are reaching our target of people who aspire to visit and stay on Scilly from further afield. In which case, that recent uplift in sessions on the website is indicative of what we all know – demand for Scilly is high.

It's important that we fuel, raise, and sustain that demand. As international borders reopen foreign destinations will become more competitive and compelling to the market. We are serving digital content to an interested audience. The number of people who follow us on Instagram has nearly trebled from 7,000 in 2019 to 19,000 now – it's a smaller audience than Visit Cornwall's (for instance) but the proportion of the total audience who engage with the content is disproportionately high; loyalty to the destination is reflected in digital behaviour.

IP secured ERDF Isles of Scilly Voucher Scheme 2 investment in a Cultural Development Plan in 2020/21. We sought this public investment to develop new IP memberships amongst the creative industries sector on Scilly, create bespoke cultural events, raise awareness of local artists, and develop relationships with mainland partners with a clear view to future ongoing investment in cultural development in Scilly. We produced the Isles of Scilly Manifesto for Culture; this sets out the ambitions of a partnership with the Council of the Isles of Scilly, the Isles of Scilly Museum Association, and the Duchy of Cornwall in our cultural aspirations for Scilly. The manifesto expands on the cultural objectives in the Destination Management Plan with renewed ambition.

The cultural partnership's ambitions centre on a new museum and in the last quarter of 2020/21 IP coordinated a museum feasibility project funded by the partnership. Cultural developments on Scilly require common purpose with mainland partners around investment and IP's Creative Islands Coordinators Tammy Bedford and Jeremy Brown have developed relationships with national and regional arts agencies that offer extraordinary future investment potential in Scilly.

Realising the potential of these opportunities requires ongoing partnership commitment to cultural development including the means for essential local match funding and practical examples of value in kind and we are committed to partnership working to achieve our ambitions in this area.

In normal circumstances sales income to the TIC, including commission on tripper boat ticket sales, meets most of its core operational costs including staffing. That model continued to work in the 2020 season based on reduced costs and we were pleased that we were able to keep the TIC open when visitors were here. The TIC's daily hours of operation were reduced in the season and its season was shorter; it is good to report that at the time of writing operations have returned to normal and the TIC is assisting its customers face to face, on the phone, by email and on social media.

The UK's economic output reduced at an unprecedented level during the pandemic, but recovery has been strong and swift - entirely unlike the global financial crisis. Nonetheless Scilly faces new competitive challenges such as limits to the practical opportunities for employers to recruit skills from the European labour market following the end of freedom of movement for citizens of the EU to work in the UK.

Looking forward IP's strategic priorities remain focussed on:

Market growth and season extension

Delivering effective destination marketing to inspire more visits throughout the year, increase spend and encourage visitors to recommend and return.

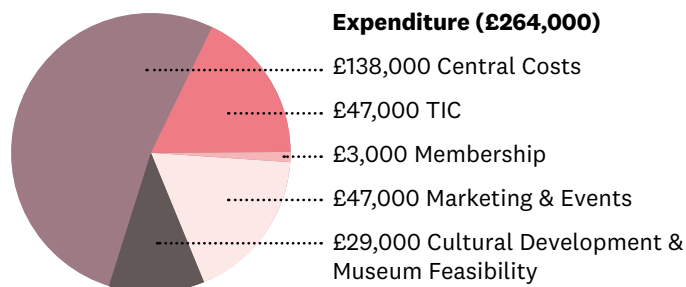
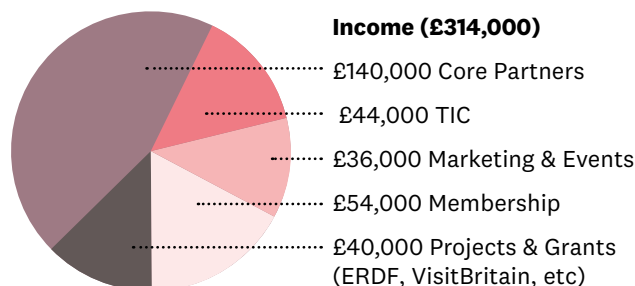
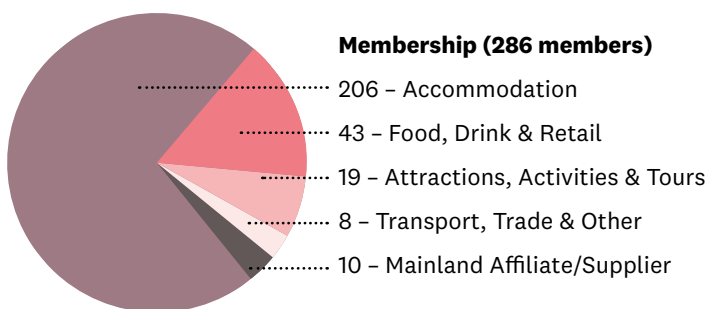
A world class visitor destination - fit for the future

Knowing our audience and shaping a sustainable destination experience which exceeds expectations.

Leading from the front and delivering in partnership

Delivering value for our strategic partners, members and stakeholders - working in partnership for the benefit of the islands.

2020/21 IN NUMBERS



2020/2021 Highlights

DIGITAL MARKETING

- Visitislesofscilly.com is the go-to portal for visitors – in 2020/21 users increased from 400,000 the previous year to 550,000 and page views increased from 2.3 to 2.8M - 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 continued to improve in 2020/21 including the opportunity to book online with TXGB.
- Investment in the development of transport booking widgets – scheduled to go live in the second half of the current year.

- IP's social media audience has risen to nearly 50,000 followers.
- Our email database remains a valuable and effective marketing asset - with nearly 90,000 active subscribers.

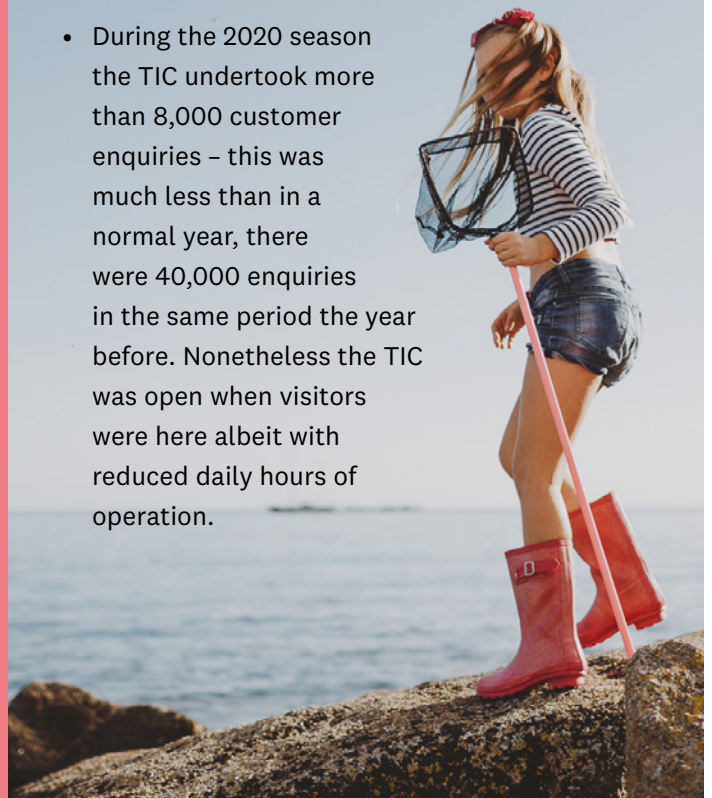


CREATIVE ISLANDS AND MUSEUM FEASIBILITY

- IP secured ERDF funding to maintain the momentum of the Creative Islands project with investment to develop membership in the creative industries sector on Scilly, create bespoke cultural events, raise awareness of local artists, and develop relationships with mainland partners in ongoing investment in cultural development in Scilly.
- We produced the Isles of Scilly Manifesto for Culture this expands on the cultural objectives in the Destination Management Plan with renewed ambition.
- Work on a project to explore the feasibility of developing a new museum started in the last quarter of 2020/21.

VISITOR SERVICES

- During the 2020 season the TIC undertook more than 8,000 customer enquiries – this was much less than in a normal year, there were 40,000 enquiries in the same period the year before. Nonetheless the TIC was open when visitors were here albeit with reduced daily hours of operation.



2020/2021 Highlights

PUBLIC RELATIONS AND MEDIA

- After a hiatus during the first lockdown IP continued invested in professional PR services undertaken by Victoria Bond in 2020/21 – securing money cannot buy print, digital and broadcast media coverage.
- In 2020 media content IP was involved in reached an online audience of more than 430 million and a print content reached more than 13 million. This was made up of 76 pieces of coverage – 34 in print, 39 online, 2 broadcast and 1 on social media. IP was involved in 9 press trips in 2020.



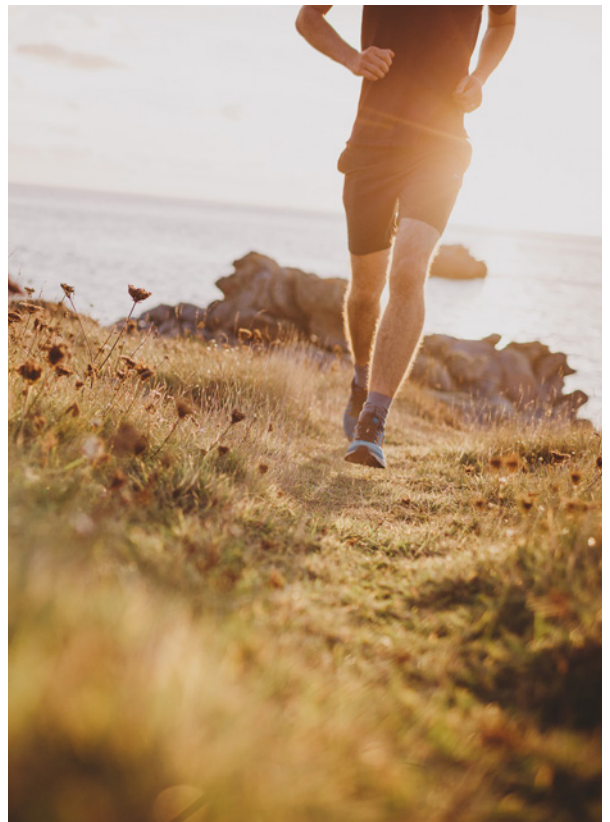
STRATEGIC LEADERSHIP AND INFLUENCE

- The Destination Management Plan continues to define the strategic context for our work with strategic partners toward 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.
- We encourage our members to seek our advice on anything from quality schemes to IT queries and from business support to regulatory issues.





Investing in the e-news ad has had a very positive impact on my Christmas sales. The number of visitors coming to my website directly after the newsletter was sent was up 900%! The Visit Scilly email list is a huge asset to retail businesses, it is a way to get your products seen by customers who love the islands, those who want a little bit of Scilly magic in their own homes and people who are genuinely keen to support our local economy.

Ella, Phoenix & Providence

The last 18 months have been unprecedented for our industry as a whole and we have much appreciated the support and advice of the IP as we have navigated our way through. They have consistently understood and recognised the ever changing needs of the serviced accommodation and dining sector. At the same time, they have never lost sight of the longer term goal of inspiring the next generation of visitor through a series of innovative and creative collaborative marketing initiatives that we have been delighted to be part of.

James Francis, Star Castle Hotel



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.

MEMBERSHIP BENEFITS

PROVEN MARKETING CHANNELS

- Our website visitislesofscilly.com is the official destination website for the islands; in 2020/21 there were 550,000 users of the website - 38% more than the year before.
- There were 800,000 sessions on the website and 2.8M pageviews – half of these were of the accommodation pages.
- Almost 90,000 people subscribe to our email marketing and receive our newsletters. Members of IP find the opportunity of sharing their message on this channel valuable.
- More than 50,000 people are fans of our social media channels. Almost three times as many people follow us on Instagram than 3 years ago. We have more than 19,000 Instagram followers, 22,000 followers on Facebook and 10,000 Twitter followers.
- 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.
- 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.

BENEFITS FOR THE ISLANDS

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 has been interrupted in the 2020 and 2021 seasons but plans for future ÖTILLÖ, Walk 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 buy into the benefits of collaborative investment in marketing Scilly. Working together on a 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.

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 2021/22 year ahead:

- Building on the value of the start and end of the season and making the most of domestic demand we will continue to support businesses to stay open for a longer season with marketing content, media communications and events that support the visitor economy throughout the year.
 - Continue to improve the visitislesofscilly.com website – continuing to improve online booking including a new travel booking widget, content, and re-marketing opportunities.
 - Maintain the momentum of cultural development on Scilly working with purpose with local, regional and national partners to further the cultural strategy for Scilly and deliver more new cultural benefits for the islands. This means high aspirations for museum development, growing IP's membership in the creative industries sector on Scilly, creating bespoke cultural events and raising awareness of local artists.
 - 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 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 – almost 90,000 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. 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 still stocks of the current edition, and we are planning to produce a new version early in 2022 – the map is incredibly popular with visitors getting around and planning their days out.



TOURIST INFORMATION CENTRE

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

The TIC is operating at its normal capacity in 2021 and 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.

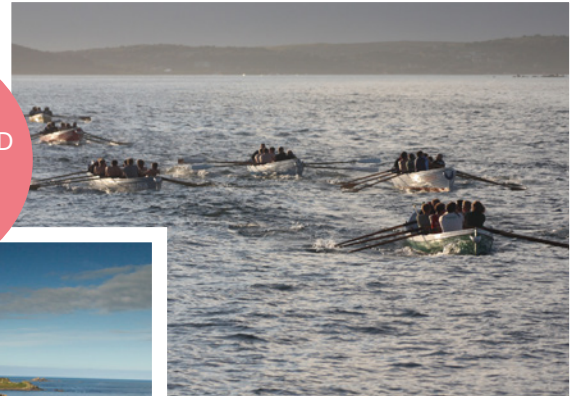
IP employs professional PR resources and we are working hard to secure new coverage to highlight and reinforce our product strengths to new and existing markets all the time.



REINTRODUCED
PROGRAMME
OF EVENTS

EVENTS

Events were cancelled in 2020 and 2021 because of the pandemic – the event programme will be reintroduced to include Walk Scilly, ÖTILLÖ, Taste of Scilly and Creative Scilly with opportunities to get involved in the events programmes and related marketing activity.



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

01720 620601 | visitislesofscilly.com

Islands' Partnership, Steamship House,
Hugh Town, Isles of Scilly, TR21 0LS

