



islands
partnership

**2023/24 ANNUAL REPORT &
Membership Prospectus
2024/25**



ST. MARY'S ◆ TRESKO ◆ ST. MARTIN'S ◆ BRYHER ◆ ST. AGNES



Foreword

Andrew Sells, Chairman,
Islands' Partnership

On behalf of the Board of the Islands' Partnership, it gives me great pleasure to present you with this summary Annual Report for 2023/24 and, looking ahead, our Membership Prospectus for 2024/25.

As I look back on the 2023/24 financial year from the summer of 2024 it is with confidence that we – IP, its stakeholders, partners, and our Members, have continued to thrive despite the challenging circumstances of the current economic climate.

For some businesses, this has been a more complex year than others as demand for domestic holidays has been influenced by unpredictable factors whether they be international, national or local.

Despite the difficulties some businesses on Scilly face, occupancy levels have remained

buoyant during the season. Speaking to our Members, it's apparent on island spend has been down. The fact that the dynamics keep changing makes our work as important as ever before to ensure the islands remain a first-rate visitor destination and the local economy sustains and grows in the years to come.

Throughout the year we, as ever, enjoyed excellent working relationships with our strategic partners, the Isles of Scilly Steamship Group, Tresco Estate, the Duchy of Cornwall and Penzance Helicopters. The Board and I are most grateful to them and look forward to continuing to work with them moving forward. We are currently working on new 3-year agreements that will help underpin the work of the IP going forward and help set its Strategy & Marketing Plan for 2025 – 2027. Euan will report on this before the end of the year.

Where there has been a dip in the market, we have done our utmost to put on activity to encourage visits to the islands by delivering our biggest and most ambitious events programme in the last 5 years. Our latest new event, Ocean Scilly, proved very popular and featured a series of Scilly Swimrun events to replace the much-loved ÖTILLÖ event. The aim of all events is to

help fill capacity during the traditionally quieter periods, increase the offering for visitors already on the islands and to encourage annual visits at these times of year.

This year has marked the first year since the formation of the Cornwall and Isles of Scilly Local Visitor Economy Partnership (LVEP). This relationship with our friends at Visit Cornwall has already proven beneficial. As well as working in partnership on a number of initiatives, which we will continue to progress over the next year, we were able to make a successful application to the UK Shared Prosperity Fund (UKSPF) to fund a new destination website, which will launch towards the end of this year.

Earlier this year, the IP with the support of the Council of the Isles of Scilly, Inner Circle Consultancy and Mel Richardson Consultancy undertook a feasibility study to establish whether a Business Improvement District (BID) would be a more suitable way to support the work of the IP. Following a comprehensive study including a wide survey of businesses on Scilly, which included Members and non-members of IP, the decision was taken to not pursue the BID model further at this stage. A summary report from the feasibility study has been made available. The consultation has provided some incredibly useful data and recommendations.

As you can see, the IP has grown and developed this year under the leadership of our Executive Vice-Chair, Euan Rodger. I'm pleased to say that after 12 months in the role and a subsequent review, the Directorship unanimously agreed to extend Euan's position permanently.

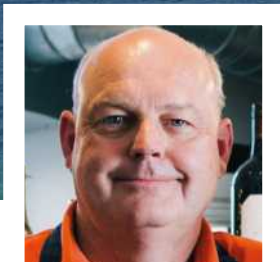
Natalie Geen left her post on Scilly as the Deputy Land Steward for the Duchy of Cornwall. I would like to thank Natalie for her contribution during her time on Scilly to the IP. The Duchy remain a Strategic Partner and at the time of writing have not appointed a new Director.

Stuart Reid, Chief Executive Officer of the Isles of Scilly Steamship Group has taken on

the Group's seat from Sharon Sandercock, their Marketing and Communications Manager. The Board and I extend our thanks to Sharon for her time as a Director. We will continue to work very closely with her on a regular basis and I formally welcome Stuart to the Board. There are no retiring Directors this year and therefore no invitation for Director nominees have been issued.

Lastly, I would like to thank all our staff, whether full-time or part-time, for their dedication and hard work. The Board and I are most grateful for your continued support as a Member. Here's to continued success into and beyond 2025.





Euan Rodger, Executive Vice Chair, Islands' Partnership

Welcome to our annual report for 2023/24 and prospectus for 2024/25. Your support over the last 12 months has been much appreciated and I look forward to continuing to work with you in 2025 and beyond.

On the whole it has been a successful season despite the unreliability of the weather; something it seems we will have to get used to. Scilly is not immune to the factors that are having an affect on every single person in the country. Despite the international and domestic challenges many people face, the main seasonal months have remained buoyant. The long-term picture remains to be seen. Bookings for 2025 are coming in strong. Our events, PR and marketing activity are making a difference as far as ensuring visitors come back year-on-year and new audiences consider visiting Scilly. Our collective partnership remains key to our shared success and a prosperous future.

Over the last year we have continued to deliver for our Members and the islands as a whole. Our events programme was bigger than ever, with the

addition of Ocean Scilly. We continued to support key events. Our services and support include the World Pilot Gig Championships and also new events such as the Scilly Swimrun series with Scilly60 Events. Walk, Creative & Taste were all very successful.

As well as delivering experiences for visitors we are ensuring we do everything we can to persuade new visitors to visit the islands. A brand new fresh, cutting-edge Visit Isles of Scilly website will launch towards the end of the year. It will be the digital window into the islands and feature engaging content, an enhanced accommodation enquiry and booking platform through the eviivo Property Management System (PMS) and more.

Our strategic partnerships have continued positively with the Local Visitor Economy Partnership (LVEP) and Visit Cornwall. The relationship has provided benefits for both parties whilst we both retain our autonomy. Through our LVEP status we were able to make a successful bid to the UK Shared Prosperity Fund (UKSPF) to finance the new website.

We continue to work with the Council of the Isles of Scilly and partners on the creative and cultural sector. It's very pleasing to see construction start on the new Scilly, Arts & Heritage – Town Hall on St. Mary's. And I add my thanks to the Isles of Scilly Steamship Group, Tresco Island, The Duchy of Cornwall and Starspeed Helicopters for their support and guidance.

A first collaborative digital marketing campaign with Great Western Railways (GWR) was a huge success with the advertising reel receiving over 1 million views across social media and increased our email subscriptions by almost 25,000 and IG followers by 4k. We continue to invest in traditional PR and marketing activity with great return in traditional print, digital column inches and in broadcast media. Over the course of the summer, we assisted the production company Boom Cymru with a 4-episode lifestyle series on Scilly which will transmit in a primetime slot on Channel 5 this winter.

Another very positive year on the cruise ship front with approximately 60 vessels visiting the islands this year. These trips have provided over 20,000 visitors, which boost business across the islands and lead to future stays. We have formed an excellent working relationship with Tom Jackman and his Scillonian Marine Services, and other stakeholders who are involved in delivering these additional visitors to the islands and look forward to working with them moving forward.

From my remarks, you can see there are many reasons to be optimistic about the future. I would like to take this opportunity to thank the IP Executive and Directors as well as the TIC team and our wonderful volunteer Cruise Ship Ambassadors.



2023/24 IN NUMBERS

Our strategic priorities continue to be as relevant as before going into the year ahead and beyond:

Market growth and season extension

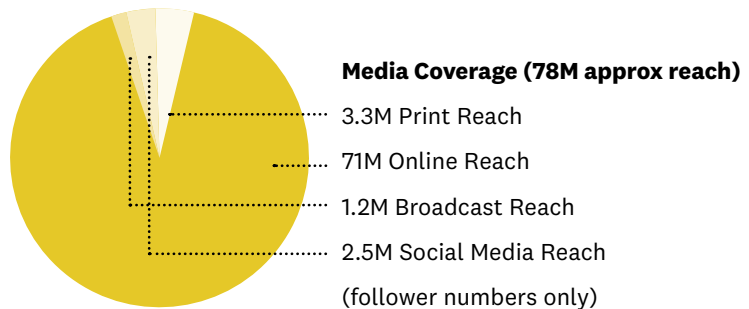
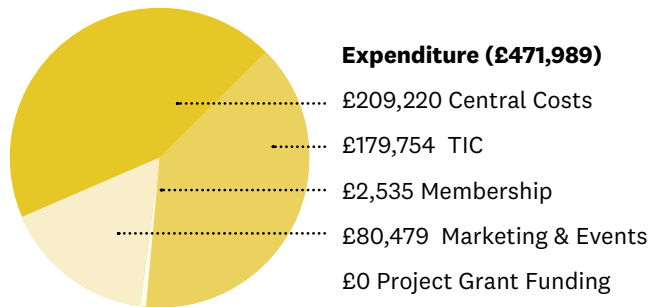
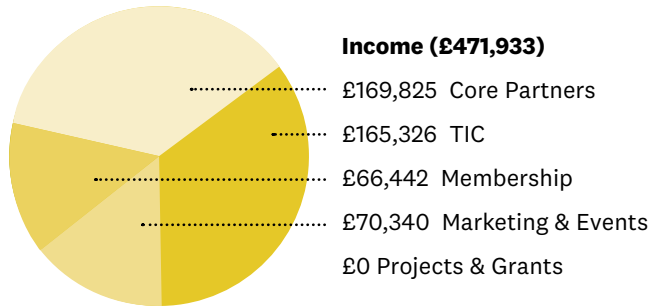
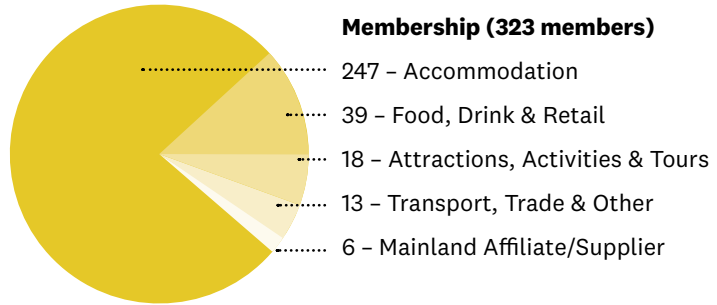
Delivering effective destination marketing to inspire more visits throughout the year, increase spend and encourage visitors to recommend and return.

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.



ISLAND PARTNERSHIP EXECUTIVE TEAM



Euan Rodger
Executive Vice Chair



Amanda Bond
Head of Marketing



Victoria Bond
PR Manager



Will Lethbridge
Business Support
Manager



Anna Mahoney
Event's Manager



Maggie Wagstaff
TIC Manager



Sue Sherris
Operations Administrator &
Cruise Ship Ambassador Co-ordinator

IP BOARD OF DIRECTORS



Andrew Sells
Chairman



Euan Rodger
Tanglewood Kitchen



Zoe Julian
Scilly Flowers &
Churchtown Farm
Cottage & Apartment



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



Nick Halliday
Tresco Estate



Stuart Reid
Isles of Scilly
Steamship Group



David Page
Penzance Helicopters



James Francis
Star Castle Hotel & Mermaid Inn



John Peacock
St Agnes Boating



Julian Branscombe
Isles of Scilly Wildlife Trust

OUR STRATEGIC PARTNERS SUPPORTED BY



TRESCO  ISLAND



Penzance
HELICOPTERS

WORKING IN PARTNERSHIP WITH



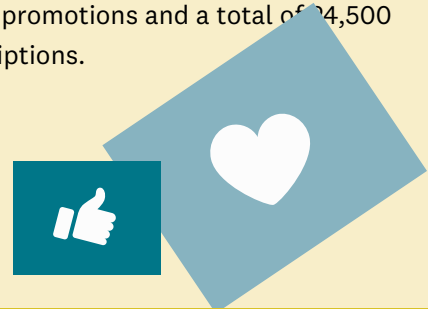
2023/2024 Highlights

DIGITAL MARKETING

- Visitislesofscilly.com is the go-to portal for visitors – with 516K users (72% organic search which demonstrates great optimisation of the site and search terms) / 2M page views. Nearly 4 pages viewed per user. Equating to 5.5M interactions! Accommodation landing page 2nd after website homepage.
- Referrals from other sources, whether that's third-party websites or social media, up 18%.
- Our email database remains a valuable and effective marketing asset - to over 100,000 active subscribers. Average open-rates are exceeding expectations with open-rates up 10% on the previous year to nearly 35% in some cases.
- We sent a whopping 3.1M emails, up 5.6% on the preceding year. Our unsubscribe rate is down by 25% meaning retention is strong. We received the highest open rate at 71% and an average

between 25% and 35% across all consumer mailers. Our visitors are keen to hear what we have to say, and subscriptions remain strong at 100K.

- Our printed collateral sits on a site called issuu.com which allows us to publish to other places. In the last financial year, our print has received 100K impressions and 21,500 reads.
- The Visit Isles of Scilly (VIOS) and Great Western Railway (GWR) "Next Stop" Campaign in July 2024, generated 1M views on competition ad reels, 2.4M impressions from paid social media promotions, 3,395% increase in web traffic from email, 256% increase in web traffic from organic social media promotions and a total of 24,500 email subscriptions.



VISITOR SERVICES

- 36,200 people visited the TIC in 2023 – more than in 2022, when there were, 34,700 visits. Spend remained high - total TIC income was £165,326 for 2023.



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.
- Membership comms have been improved with freshly designed newsletters – a weekly industry and partner update and a monthly PR, Marketing and Event update.
- Dedicated monthly drop-in sessions have been continued.
- We encourage our members to seek our advice on anything from quality schemes to IT queries and from business support to regulatory issues.
- Supply Scilly will take place in February 2025.

2023/2024 Highlights

PUBLIC RELATIONS AND MEDIA

- The IP continues to invest in Public Relations via traditional media, both online and print, plus digital activity through social media influencers.
- In 2023, the IP secured 72 pieces of coverage including high-value print pieces in monthly glossies, National newspapers and niche food & drink publications. 11 Trips were undertaken.
- Solo Destination features in the i newspaper, The Week online, the Mail on Sunday. Round-up's in The Guardian, Telegraph, Times and Coast.
- Traditional media trips with YOU Magazine (Mail on Sunday) The Week, Country Living, National Geographic and the i newspaper.
- Influencer trips as part of the GWR campaign with @Nospaceinmypassport and @MyUKstaycation (total content 2 million views to 240,000 followers).

- Channel 5 destination series will be transmitted this November. The series will be comprised of 4 episodes each 1 hour long (including adverts) which will be broadcast in a prime-time slot.



STRATEGIC LEADERSHIP AND INFLUENCE

- In partnership with our Strategic Partners, we will deliver a new Strategy & Marketing Plan for 2025 and beyond. This will be measured going forward on shared Data so that we ensure it is delivering for us all.
- The IP continues to champion the islands' tourism industry, providing leadership and representation at local, regional, and national levels.
- The Cornwall and Isles of Scilly Local Visitor Economy Partnerships (LVEP) continues to bear fruit for the IP and Visit Cornwall. We will continue to work in collaboration with Visit Cornwall on projects but will have greater access to resources,

funding and a seat at the table at the national level. We still retain all rights to all print and digital assets and will remain an autonomous organisation.

- Through the LVEP the IP made a successful application to the UK Shared Prosperity Fund to develop a new destination website which will launch in the final quarter of 2024.
- We continue to invest in research and market intelligence – a new Visitor Survey will be carried out in 2025 out by the South West Research Company.

2022/2023 Highlights

EVENTS

- The IP continues to invest in events by supporting existing ones and developing its own programme to help fill quieter periods.
- We will continue to support the delivery of the World Pilot Gig Championships and will continue to take responsibility to enhance the visitor and spectator experience.
- Elevating existing traditional favourites by introducing special guests whilst championing our own on island talent.



CULTURAL DEVELOPMENT

- IP worked with the Council of the Isles of Scilly to secure another round of Arts Council England investment in our common interests in the cultural development agenda.
- Key priorities include engagement with the creative industries sector on Scilly, creating bespoke cultural events including the Creative Scilly programme and event, raising awareness of local artists, and developing relationships with mainland partners in ongoing investment in cultural development in Scilly.
- We will continue to foster our relationship with Scilly, Arts & Heritage and support the re-developed Town Hall in all its endeavours.





“ We have always supported the IP but this last year, during our transition to Scilly Holiday Homes, their support and encouragement has been invaluable. We actively encourage all our property owners to be members, as the IP does such wonderful work to promote the islands-attracting visitors, managing publicity and putting on events. Their work really does benefit everyone - local businesses and residents alike. We are looking forward to the new website, and we are eternally grateful for their ongoing assistance with the online booking platform. ”

**Laurie Wilson,
Scilly Holiday Homes**



“ We have been with the Islands’ Partnership for many years, and although Phoenix Stained Glass and the other studios are now well established, we often find new visitors struggle to find us, as we are off the beaten track and a bit out of sight. The IP sends a great number of journalists and photographers our way, which gives us excellent national publicity, encouraging people to hunt us out. The TIC also helps by sending people our way and stocking our brochures. ”

**Oriel Hicks,
Phoenix Craft Studios
& Tamarisk Gallery**



“ The Islands’ Partnership has been a fabulous force in helping our café reach an even bigger audience beyond the regular visitors. Through events designed to showcase the best of what Scilly has to offer, we have been able to landmark the islands as both community-led and as individual businesses, giving everyone a platform to grow and shine. We can only look forward to working together with the IP and to seeing what new and exciting avenues we can explore together. ”

**Tristan Hick & Francesca
Regazzoni - Coastguards
Lookout**



“ Since Scilly Yacht Charters launched in the summer of 2023, we have been a member of the IP and enlisted their services to help launch this new offering. Their marketing, PR and all-round business services have made a huge difference in raising awareness and driving business. We’ve worked with them on events and activities which have served us both really well this year. They have a great team who are always attentive and responsive. The work the IP does to raise Scilly’s profile and attract new visitors is vital to the islands’ future success. ”

**Paul Lewis – Scilly
Yacht Charters**

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](https://www.visitislesofscilly.com) is the official destination website for the islands, accounting for over half a million users, 82% of which are new to the Isles of Scilly.
- 5.5 million interactions and 2 million page views, on average 4 pages is viewed per person.
- Organic search traffic is at 74% which leads to higher quality leads and better engagement with our content.
- The accommodation landing page ranks #2 after the homepage, with accommodation page searches accounting for nearly half of all site users.
- More than 100,000 people subscribe to our email marketing and receive our newsletters. Members of IP find the opportunity of sharing their message on this channel valuable especially with high average open rates.
- Social media – growth on Instagram has doubled with our efforts to revitalise the channel.
- 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, branding and marketing assets which complement members' own brands with a recognisable Scilly destination identity.

ACCESS TO DATA AND THE LATEST RESEARCH

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, with figures for the number of visitors coming to Scilly and how much they spend etc, together with shared data from our partners ensures we can help keep Members informed.

ACCESS TO TRAINING, BUSINESS ADVICE AND INDUSTRY NEWS

The IP facilitates training sessions and access to business support on the islands. We issue regular members' newsletters, which contain useful news, information, and opportunities for member businesses, including What's On.

BENEFITS FOR THE ISLANDS

EVENTS

IP supports organisations and hosts events on and for the islands that help drive new visitors, particularly in the shoulder seasons.

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 as a visitor destination. 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. And this includes its proven role in helping house stranded passengers.

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 2024/25 year ahead reflect a business as usual approach to retention and growth, with a focus on domestic and international competition in the continued high inflation economic conditions:

-
- Building on the value of the start and end of the season and making the most of domestic demand we will, working with our partners, 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.
 - Launch a brand new [visitislesofscilly.com](https://www.visitislesofscilly.com) website and with a continued focus on the most effective online booking options for our members – this includes an enhanced version of the eviivo Property Management System.
 - Maintain the momentum of cultural development and creative sector on Scilly, particularly with regards to development of the new museum and cultural centre - working with purpose with our partners, especially the Council of the Isles of Scilly.
 - 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. The development of a Scilly Pledge for businesses, visitors and the wider community will be rolled out in the next year.
 - 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

New ad-hoc digital campaigns and competitions – we will alert you to any new opportunities arise through funding opportunities and partnerships.



VISITISLESOFSCILLY.COM

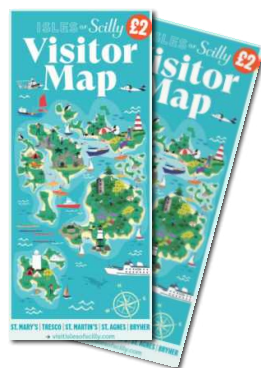
Our website is exactly where it needs to be in Google search results (non- sponsored):

- 1st for - Isles of Scilly
- 1st for - Isles of Scilly accommodation
- 1st for - Isles of Scilly things to do
- 1st for - Isles of Scilly places to eat
- 1st for - Isles of Scilly B&B
- 1st for - Isles of Scilly cottages
- 1st for - Isles of Scilly attractions
- The majority of respondents on social media used Facebook (84%) on a regular basis.
- The visitislesofscilly.com website was used by 53% of staying visitors, 51% of day visitors, 71% of first time visitors and 49% of repeat visitors when planning and booking their visit to the Islands.



POCKET MAP

We continue to make improvements to the popular on-island Pocket Map with more information about things to do and places to eat and drink. Your support makes it comprehensive, financially viable and valuable for guests. Our new-look visitor map is distributed by the TIC and many other outlets the map is incredibly popular with visitors planning their days out.



TOURIST INFORMATION CENTRE

The TIC has been operating at its normal capacity in 2024 and communicates with a vast number of visitors in person, on the phone, by email and through social media. It provides an outlet for boat ticket sales, bespoke advice, maps, souvenirs, event tickets and of course What's On!



PUBLIC RELATIONS AND THE MEDIA

Press trips and PR activities arranged by the IP lead to extremely valuable print, digital and broadcast.

EVENTS

The IP has reintroduced and bolstered its events programme which is run by our Events Manager. Plenty of events are scheduled for 2025 and the majority of dates have been confirmed and communicated to market. The IP will continue to collaborate with other existing events including the World Pilot Gig Championships and the new Scilly60 Swimrun.

CONTENT MARKETING

The IP delivers marketing content planned around the calendar - raising awareness of seasonal and product benefits and responding to consumer buying behaviour. This year we have partnered with a host of mainland partners, promoting their visit to drive further interest and reach. 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@visitislesofscilly.com

01720 620601 | visitislesofscilly.com

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

LS ES • Scilly

