



islands
partnership

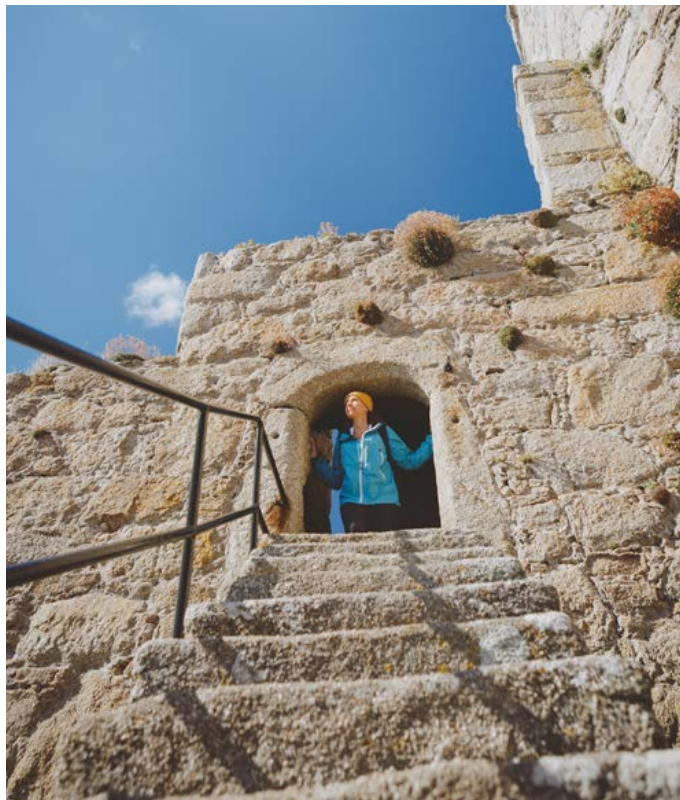
ANNUAL REPORT 2018/19 &
Membership
Prospectus
2019/20

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OUR ROLE

The Islands' Partnership is a non-profit making organisation funded by membership subscription and is responsible for marketing the Isles of Scilly as a destination. The Islands' Partnership aims to provide the resources, energy and focus to enable its members to develop the islands' visitor economy to its full potential. Whilst the Islands' Partnership is recognised as the official Destination Management Organisation for the Isles of Scilly, it strives to reach out to all sectors of the business community, championing their needs and providing a shared platform to develop common goals.



Foreword

Andrew Sells, Chairman,
Islands' Partnership

On behalf of the Board of the Islands' Partnership, it gives me great pleasure to present to you this summary Annual Report for 2018/19 and, looking ahead, our membership prospectus for 2019/20.

It was a great honour to be asked to become the new Chairman of the Islands' Partnership - a role which I formally took up in February 2019. The Isles of Scilly hold a special place in the hearts of my family. All generations have been visiting this tranquil haven for many years and I regard it as a great privilege to be asked to play a part in helping to shape its future.

Having spent the previous five years as Chairman of Natural England, the national body responsible for advising the government on the natural environment, I'm very aware of what an exceptional place this is and just how special Scilly is compared with anywhere else in the country. It is truly a natural wonder.

However, I'm under no illusions that this brings with it both challenges and opportunities in equal measure.

The excellent Destination Management Plan that the Islands' Partnership launched last year highlights these very clearly - and in so doing, seeks to bring the islands together behind a shared vision and a collaborative approach to secure a sustainable future for the islands and its vital tourism industry.

It's particularly encouraging to see the progress that's already being made on a number of the priorities identified in the DMP: the new investment in the islands transport system; the continued investment in the islands' infrastructure and Smart Islands Programme and the new cultural ambition and partnership working that is being cultivated through the Islands' Partnership's very own Creative Islands project.

I have no doubt that the Islands' Partnership should continue to play an active part in helping to drive these initiatives forward. However, our core focus remains to lead the marketing of Scilly as a visitor destination and to ensure that the islands' tourism offer >>



is fit for the future and market-ready in the face of an increasingly competitive marketplace.

I have to say, it is a role that I can see the Islands' Partnership has clearly delivered to good effect in recent years. That's why, in my first few months as Chairman, my priority has been to secure greater financial resilience for us as an organisation so that we can continue this delivery, confident of our future funding position.

I'm delighted to say that we now have new three-year agreements in place with our strategic partners, underpinned by a shared and common purpose to support the growth of the islands' visitor economy. These are firm foundations on which to build again.

Looking ahead therefore, there are genuine grounds for optimism. Interest in Scilly remains as high as ever - as evidenced through the continued national media interest and the performance of our own Visit Isles of Scilly marketing channels.

Visitor numbers too continue to grow, easily out-performing the national average.

Here at the Islands' Partnership, there will be an inevitable period of transition in the short term as we bring in a new Executive Director to build on this momentum and lead the organisation forward. After four and a half years in the role, the Islands' Partnership said goodbye to David Jackson this summer. David has been instrumental in so much of what the Islands' Partnership has achieved in recent years and leaves with the sincere thanks of myself and my fellow Directors for all he has done. He leaves both us and the islands in a far stronger position than when he arrived.

I have no doubt that, with the continued support of you, our members, the next chapter for the Islands' Partnership and the islands as a whole, looks even brighter. Here's to a busy summer and remainder of the 2019 season - and I look forward to having the opportunity to meet many of you at our AGM in October.

IP BOARD OF DIRECTORS



Andrew Sells
(Chairman)



Robert Francis (Vice Chairman)
Star Castle Hotel
& Holy Vale Winery



Jon May
Peninnis Farm and Lodges,
Sandpiper Shop and apartments



Euan Rodger
Tanglewood Kitchen



John Peacock
St. Agnes Boating



Luke Humphries
Duchy of Cornwall



Sabine Schraudolph
Strudel Up Country
& Strudel In Town



Philip Callan
Hell Bay Hotel
and Tresco Estate



Sharon Sandercock
Isles of Scilly
Steamship Company

OUR STRATEGIC PARTNERS



WORKING IN PARTNERSHIP WITH



Reflections on a busy year



David Jackson,
Executive Director,
Islands' Partnership

Thanks to an incredible summer last year, many businesses on Scilly reported 2018 as being an exceptionally busy year. There's little doubt that visitor numbers were equally as strong as they have been for any of the last few years - buoyed in particular by growth in day trippers and cruise ship passengers - both of whom continue to be so important to the islands' economy.

However, whilst 2018 was busy for many, there's also evidence to suggest that the prevailing economic climate and uncertainty caused by the ongoing Brexit process has had an impact on visitor spending. Growth in the all-important staying visitor - particularly those travelling by air - remains stubbornly slow by comparison, although it is important to set this against the national picture, where domestic holidays were 4% down in 2018 compared with the year before.

What is increasingly clear however is that our biggest opportunity to grow our staying visitor market is to attract more visitors in the shoulder months. The Destination Management Plan rightly highlights this as a strategic priority for the islands if our vital tourism industry is to grow and thrive. It's been particularly

encouraging therefore to see support building for this - and a growing number of businesses joining our 'coalition of the willing' who are committed to trading later into the season, opening earlier - or indeed to trade year-round. Our autumn 2019 and spring 2020 campaigns will seek to harness this offering and drive real market growth - even if only a week at a time.

Over the past year, our activity has continued to lead the way in the marketing of the islands. Particular successes have included our ever-expanding events programme - 2018 seeing our largest ever Walk Scilly, with record ticket sales. Similarly, the Taste of Scilly Festival in September has firmly established itself as one of the key events in the islands' calendar. And, of course, ÖTILLÖ - yet another spectacular highlight that continues to build momentum, not to mention national and international profile, each year.

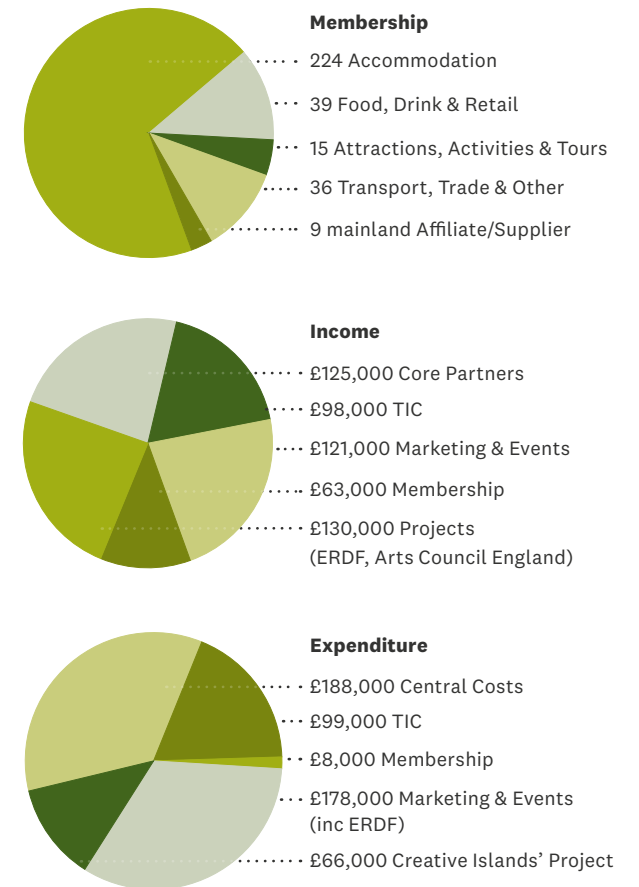
The past year has also seen our Arts Council England funded Creative Islands project commence in earnest, with some stand-out achievements. The new comprehensive Arts Guide to Scilly, young curators project with the Five Islands Academy and the museum, and the series of artist residencies which have attracted nationally significant and renowned artists to the islands have all begun to stimulate new thinking and opportunities for collaboration with the islands' cultural sector. The commissions we hope will

result from these residencies, coupled with the new Walking Stories audio guides, the new Creative Scilly Festival and joint working with cultural partners and academic institutions both on Scilly and on the mainland, all point towards an exciting year ahead.

Perhaps the biggest success over the past year however has been the delivery of our 'booking enablement' project and the relaunch in December of the islands' flagship website, visitislesofscilly.com. With almost £100,000 worth of online bookings and 2,000 bednights in the first half of this year alone, there's no greater evidence to demonstrate visitors' desire to have access to real-time availability and online booking through the destination website. However, it is the step-change in the number of businesses engaging in the system that is perhaps the biggest achievement. From an almost zero base, more than 200 properties are now updating availability on the visitislesofscilly.com site and close to 50 are offering some form of online bookability to the customer. Thank you for your support and continued engagement in this process.

Looking back on the past four and a half years, I feel very proud of what the IP has achieved. My thanks must go to the Directors for their unwavering support - and of course to my team whose sheer hard work and dedication have been a credit to the IP and to the islands. But,

2018/19 IN NUMBERS



most importantly, I must thank you - our members - for being so supportive of both myself and the IP and for continuing to believe in what we do. This continued commitment is as important now as ever, so I can only hope that you'll be able to extend this same level of support to my successor as you have to me.

EVENTS

- The IP's financial support and leadership has been instrumental in continuing to bring the ÖTILLÖ World Swimrun Series to Scilly. We're proud to see this fantastic event continue to grow and become a nationally recognised event
- Record ticket sales and spend for Walk Scilly and the Taste of Scilly Festival
- Additional artistic and cultural programming through the Creative Islands project, including sand art, folk concerts, artist walks and a highly successful inaugural Paint the Day



DIGITAL

- The newly relaunched visitislesofscilly.com continues to be the go-to portal for all visitors with almost 500,000 unique visits each year, generating thousands of booking enquiries for our members
- New online booking functionality is driving a step change in the islands' adoption of booking systems and real-time availability management
- Our social media following has risen to over 35,000, with significant new growth and engagement via Instagram
- Our email database remains a valuable and effective marketing asset with almost 80,000 active subscribers



500,000
UNIQUE
VISITS



MARKETING

- Over 28,000 brochures distributed nationwide or downloaded online and used by an impressive 64% of first time visitors
- Successful marketing campaigns, helping to drive new visitors, including via Youtube, social media and PR
- Continued investment in professional, on-brand photography and video content
- Attendance and representation at major overseas and travel trade exhibitions



64%
FIRST TIME
VISITORS



VISITOR SERVICES

- The TIC has once again welcomed and handled over 50,000 visitors, phone calls and emails throughout the year. It continues to play a vital role that is highly valued by visitors and members alike
- Our fantastic TIC and staff were awarded the Silver Award at the 2018 Cornwall Tourism Awards – and went on to be Highly Commended at the South West Regional Awards
- Our visiting cruise ships provide an important economic boost to the islands. During 2018, almost 14,000 passengers were welcomed to St Mary's alone, with our fantastic team of volunteer welcome ambassadors meeting and greeting almost every one



PUBLIC RELATIONS AND MEDIA

- Our investment in PR continues to pay dividends, with further money-can't-buy media coverage secured over the last year
- Highlights include major features in the Sunday Times, Mail on Sunday, Guardian, Harper's Bazaar, Coast and National Geographic, plus TV coverage from the likes of ITV and Channel 4 and an increasing volume of social media influencers, bloggers and vloggers



CREATIVE ISLANDS

- Creative Islands continues to develop and deliver imaginative new creative and cultural activity alongside a consortium of local and regional partners
- Highlights in its first full year include the production of a new Arts Guide, development of a new young curators programme, running of a series of artist residencies, launch of the walking stories audio guides and the development of the inaugural Creative Scilly festival



STRATEGIC LEADERSHIP & INFLUENCE

- Following the production of the Destination Management Plan, the IP launched the supporting Action Plan in 2018, with delivery now underway across a range of partners
- 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, providing valuable insight and market intelligence



INDUSTRY SUPPORT

- Scilly Business Week - This year's event was our biggest and most successful yet
- Supply Scilly - Similarly, February's Supply Scilly was another trade sell-out, with overwhelmingly positive feedback from both suppliers and local businesses alike
- We continue to maintain an open-door policy for our members and are on-hand to provide advice on anything from quality schemes to IT queries and from business support to regulatory issues



Membership

WHAT'S IN IT FOR YOU?

A PROVEN MARKETING CHANNEL

- Our website visitislesofscilly.com is the official destination website for the islands and receives over **750,000** visitors a year.
- Our members receive up to 10,000 visits to their listing on our website alone.
- We produce the official Isles of Scilly brochure and distribute **28,000** copies nationwide.
- 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 attend major domestic and overseas 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, brand and marketing campaign toolkits/assets helping to boost your own marketing activity.

ACCESS TO DATA AND THE LATEST RESEARCH

The IP continues to invest in professional market research to ensure we know who our visitors are, where they're from and their likes/dislikes and attitudes to Scilly. This insight, together with annual figures for the number of visitors coming to Scilly and how much they spend etc is all available to our members to help inform your own plans.

PREFERENTIAL RATES & DISCOUNTS

Thanks to our membership base, we're often able to secure preferential rates or provide access to professional services that may not be available to an individual business. Examples include savings on car parking and hire, mainland accommodation and photographic services.

ACCESS TO TRAINING, BUSINESS ADVICE AND INDUSTRY NEWS

The IP regularly runs or facilitates training sessions or access to business support on the islands. We offer these sessions to members as a priority, or at reduced or nil cost. We also issue a members' newsletter every week which, in addition to the official 'what's on' for the week ahead, contains useful news, information and exclusive opportunities for member businesses.

WHAT'S IN IT FOR THE ISLANDS?

EVENTS

The IP supports, creates and manages events on and for the islands that help drive new visitors, particularly in the shoulder seasons. The inaugural Creative Scilly festival was a resounding success, the ÖTILLÖ, Taste of Scilly Festival, Walk Scilly and the Walk Scilly Long Weekend are all run and/or funded by the Islands' Partnership.

PROMOTION

However big or small your business, when signing up to be a member of the IP, you are automatically buying into a **£200,000+** marketing campaign for the islands. Without everyone's individual support and contribution, this level of professional destination marketing would simply not happen.

TOURIST INFORMATION CENTRE

Without direct funding from the Council to run the TIC, support from our members is all the more vital in ensuring we can continue to operate this highly valued service for our visitors.

UNLOCKING ADDITIONAL FUNDING

Every £1 we receive in membership fees can be converted to £5 thanks to the other project income and activity this unlocks. Our initial membership base is therefore critical in leveraging match funding.

FLYING THE FLAG FOR TOURISM

Our small team champions the sector here on Scilly, but also regionally and nationally. We fly the Scilly flag at every opportunity, making sure both the islands and tourism are represented, taken seriously and supported.

SUPPORTING THE LOCAL ECONOMY

We know our collective efforts are having an effect – and, in particular, we know that our continued investment in marketing the islands is attracting new visitors. They put money into the local economy, which consequently supports everyone – from the accommodation providers and restaurants to the haulage companies and builders.

A greater number of higher spending visitors means a more productive and prosperous local economy.

REMEMBER...

The Islands' Partnerships is a not-for-profit organisation.

Every single contribution made by businesses on the islands is ploughed right back into Scilly's visitor economy.

Looking Ahead

Our strategic priorities and work programme are clear for the year ahead. In 2019/20 we will:

1 Focus our efforts on season extension activity, including a shared plan of openings and supporting marketing campaigns to ensure we have a cohesive and attractive offer for visitors in autumn 2019 and spring 2020.

2 Build on the success of the relaunched visitislesofscilly.com website and online booking functionality.

3 Continue to lead the delivery of Scilly's Creative Islands project, working with local cultural partners to fully realise the potential of the islands' cultural offer, including new visitor experiences that will drive additional demand.

4 Develop and deliver a new local assessment scheme for Scilly – the 'Scilly Standard' – aligned to the national approach yet specific to Scilly, recognising local identity, character, culture and service.

5 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.

6 Continue to provide strategic input to the islands' transport agenda via the reformed Transport Board, by working closely with strategic partners, transport operators and infrastructure owners.

7 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 and employ responsible behaviour that will help to protect and preserve the unique environment on which we depend.

8 Provide sector and industry leadership, acting as the spokesperson for the islands' visitor economy, providing strategic insight and input on matters affecting or impacting on Scilly's visitor economy including considered input to relevant local, regional and national policies, strategies, and major developments.

Marketing opportunities

Looking to market your business? Our range of marketing and advertising opportunities provide businesses with proven reach and return.

EMAIL MARKETING

The size of our customer database has grown significantly over the last year and now totals nearly 80,000 contacts who have signed up to receive news and offers.

Every month, we send these contacts an email packed with reasons to come to Scilly. Within each newsletter, we offer at least two advertorial slots per month for businesses to showcase your latest offer or promotion.

Open rates of our emails are significantly higher than industry averages – up to 30%. Click-throughs to advertisers can also be several hundred per newsletter.

Reach up to 80,000 customers interested in Scilly every month



VISIT ISLES OF SCILLY GUIDE

Over the last couple of years, we have seen unprecedented demand for our guide – with overwhelmingly positive feedback from both visitors and the industry alike. Retaining the same popular size, advertising space will be similar to 2019 providing a range of options for businesses of all sizes and budget – both accommodation and non-accommodation.

28,000 PRINT-RUN TARGETED NATIONWIDE DISTRIBUTION PLUS EVENTS, EXHIBITIONS AND PR

Our 2018 survey showed that a record proportion of visitors rated our Visit Isles of Scilly Guide (brochure) as the most useful piece of print.

VISITISLESOFSCILLY.COM

Quite simply – the number one website for the islands and an indispensable marketing channel for businesses on Scilly.



OVER THREE QUARTERS OF A MILLION VISITORS EACH YEAR

No.1 in Google for all relevant searches

Used by 64% of staying visitors and an impressive 76% of first-time visitors when planning and booking their visit to the islands.

Anticipated print-run of at least 6,000

POCKET MAP

Our popular on-island Pocket Map is once again being enhanced and re-printed ready for the 2020 season, with a better value proposition for the islands' non accommodation businesses to be featured.

INCREDIBLY POPULAR WITH VISITORS IN GETTING AROUND AND PLANNING THEIR DAYS OUT

EXHIBITIONS & TRADE SHOWS

The IP will continue to attend and exhibit at UK and, with our partners, international travel shows. In the last year, the IP has met with several international tour operators and buyers to encourage them to bring more business to Scilly.

In order to represent members at these shows – or perhaps organise joint attendance, we are keen to hear from businesses who would like to exploit opportunities to grow business from both the UK trade and overseas.

TOURIST INFORMATION CENTRE

With an annual footfall of more than 50,000, and a huge reach through its social media channels and official What's On and Things to Do sheets, our award-winning TIC remains an essential tool for Scilly's visitors.

MAKE SURE VISITORS KNOW ABOUT YOUR BUSINESS



PUBLIC RELATIONS & THE MEDIA

Press trips arranged through, and PR activities arranged by, the IP yield hundreds of pieces of coverage of Scilly in print, broadcast and in online media. In almost every case, the accommodation the journalist stays in, the places they visit and the experiences they enjoy all appear in the stories filed, providing money-can't-buy opportunities for those member (only) businesses willing to be hosts.

With dedicated PR support in-house at the IP, we're already working hard for the 2020 season – not just with respect to generic travel press trips but increasingly to ensure that Scilly is mentioned in some specialist titles and features that highlight different aspects of the islands' appeal and year-round charm, be it wildlife, wellness, or adventure.

Remember, we only approach IP member businesses for media features, so make sure you don't miss out.



EVENTS

Whether it's Walk Scilly, ÖTILLÖ, Taste of Scilly or Creative Scilly, there are lots of opportunities throughout the year to get involved in our expanding events programme and related marketing activity.

CAMPAIGNS

The IP runs advertising campaigns at different points in the year - to drive awareness of Scilly during the early holiday planning period, as well as tactical promotions during the season. Going forward there will be opportunities to collaborate on this activity and secure your own reduced advertising rates as part of a cooperative, joint media buying approach.

Advertising that's right for you!

New for 2019/2020, we've introduced these specific advertising packages, designed to deliver **big savings** across our main marketing channels.

Of course, you can pick and choose the marketing channels individually (see the 2019/2020 rate card and membership form), but we think these simple packages offer great value for money for our members.

ADVERTISING BUNDLES: ACCOMMODATION

DIGITAL ONLY BUNDLE

- 2 e-newsletter features
- Featured business for one month on visitislesofscilly.com
- Social media package/takeover (Value = £650)

£495
SAVE
£155

COMBINED BUNDLE

- Advertising in the 2020 Guide
- Free listing on visitislesofscilly.com
- Access to online special offers and late availability (Value = from £455)
- *from £215 for 1/8 page ad

FROM
£215*
SAVE
£240

ADVERTISING BUNDLES: NON-ACCOMMODATION

DIGITAL ONLY BUNDLE

- 2 e-newsletter features
- Featured business for one month on visitislesofscilly.com
- Social media package/takeover (Value = £650)

£445
SAVE
£205

COMBINED BUNDLE

- Featured business for one month on visitislesofscilly.com
- Advertising via the TIC (Leaflets, Weekly What's On / Things to Do etc)
- Advertorial in 2020 Visitor Guide;
- Listing on 2020 Pocket Map; (Value = £670)

£495
SAVE
£175





Joining the Islands' Partnership is easy..

Contact our team by email, phone or post and we can send you all the details to become a member. Or if you're on the islands, why not pop in and talk to us? We have an open-door policy and welcome all current and prospective members.

✉ enquiries@islandspartnership.co.uk

☎ (01720) 620 601

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