

DESTINATION MANAGEMENT PLAN

The case for change and a new sense
of direction for the visitor economy of
the Isles of Scilly

March 2018

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“For many years Scilly has been a hugely popular visitor destination and it remains so to this day. However, tastes and demands change and for tourism to remain the heartbeat of the islands' economy the time to re-assess is now. There exists a wonderful opportunity for Scilly to be the ‘escape’ destination in the UK and meet the growing demand for discerning, authentic experience-led tourism. For this unique opportunity to be realised there must be a willingness to innovate and contemporise to deliver the distinctly Scillonian experiences visitors seek – in touch with the heritage of place, the landscape and its people.”

James Berresford
Chair, Islands' Partnership

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LOCAL ENTERPRISE PARTNERSHIP

EXECUTIVE SUMMARY

1. Executive summary

1.1 CONTEXT

Tourism is an important economy for the British Isles, especially the South West of England, and nowhere more so than the Isles of Scilly. Without a successful visitor economy, which generates the majority of the islands' income and jobs, the sustainability of our communities is at risk. After some difficult years, decline has been arrested. But further, more sustainable, growth requires a strategic step-change, to respond to the rapidly changing markets seeking new experiences. This means taking a unified approach and unprecedented levels of collaboration.

The challenges are many, including conservation, housing, visitor accommodation, skills, services and of course transport, all shaping the Scilly brand in the minds of visitors.

1.2 BIG CHALLENGES AND OPPORTUNITIES

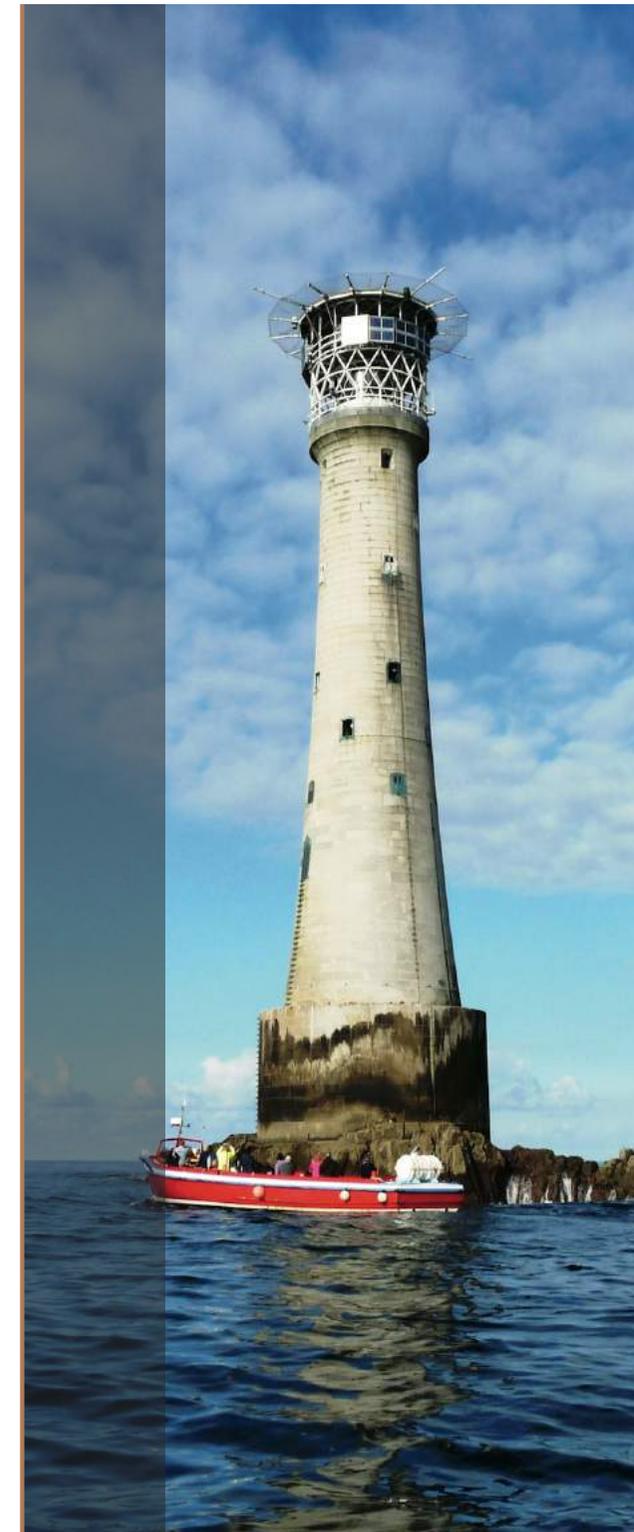
There are plenty of points in the 'plus column', alongside some significant market, local and infrastructural challenges. The historic premium product, controllable entry points that protect from over-tourism, fabulous natural environs, and a distinctive cultural heritage all support a new, committed strategy of **incremental growth**, built on clearly defined priorities to ensure that the Destination Management Plan addresses its economic imperatives.

1.3 SOLUTIONS

At the heart of the brand is the visitor experience, throughout the visitor journey. We need to project a consistent way of thinking, planning and doing – **the Isles of Scilly way**. This has to be fully supported by Scilly-wide levels of aspirational and measurable quality and service – **the Isles of Scilly standard**. And to maximise the market reach of the offer we need our consistent and confident messages communicated through a common brand – **the Isles of Scilly voice**. These can shine through innovative elements of the offer, e.g. *Smart Islands*, wellness/retreats tourism, seafood, and as England's unique archipelago. These three strands of the approach can then be brought to life through the focused set of strategic priorities, in particular season extension, product & service improvement, and transport & accessibility.

1.4 NEXT STEPS AND ACTIONS

Clear-minded economic foundations inform the fourteen **strategic priorities**, framed firstly as objectives, and which in turn drive the supporting **Action Plan**. It is here that the focus on growth and productivity set out in the aims and objectives becomes most prominent through specific targets and measures. This clear logic chain seeks to frame and direct a shared ambition – responding to the challenges and opportunities directly – along a positive roadmap for the long-term sustainability of our islands and our communities through our visitor economy.



CONTEXT

2. The case for change

2.1 KEY ISSUES

This Destination Management Plan (DMP) aims to move the tourism sector forward – building on the considerable analysis of the Blue Sail (2016) and Ash Futures (2014) reports – proposing a series of actions for the Isles of Scilly to implement. Why is change essential? The Isles of Scilly are blessed with an exceptionally beautiful, distinctive natural environment and a loyal visitor base built up over several generations. Without appropriate management and intervention however, both face an uncertain future. This poses a potentially significant threat to the very viability of our tourism dependent community, as generational tastes and expectations evolve and more conveniently accessible destinations open up worldwide, Scilly faces a challenge to retain its appeal and remain competitive.

2.1.1 A UK small island economy unlike any other

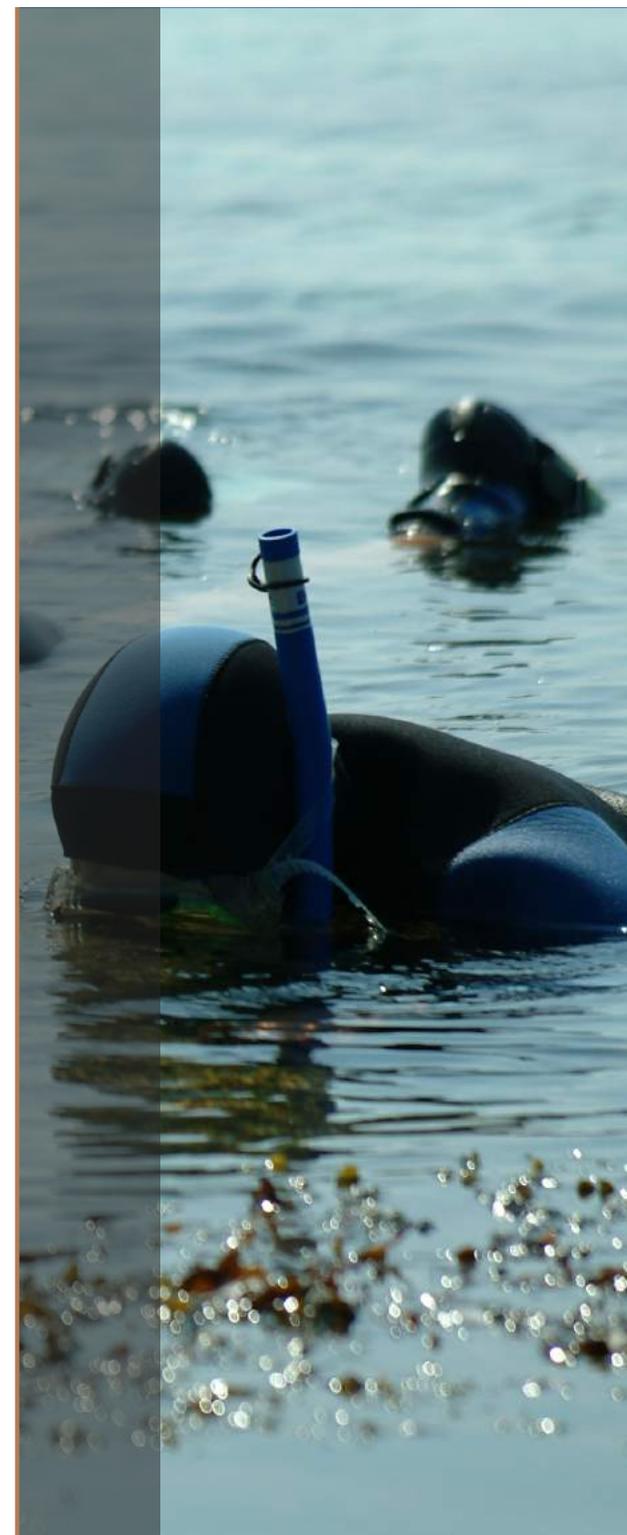
As a small island economy, there is an inherent fragility. Unlike mainland economies, the potential for diversification of the economy is more limited, primarily as a result of access limitations, costs, skills, size of labour pool, and competitive pressures. Tourism is the islands' main source of jobs and income – accounting for 80% of employment (over 800 jobs) and 85% of the economy (approx. £35m).

There is an overwhelming role, and case for, tourism:

- It **sustains mainland transport links**, otherwise unviable – for passengers and freight, bringing in everyday supplies.
- It **sustains inter-island transport services**, which might lose viability and need to be reduced, if tourism declined.
- It **supports the viability of the school**, which in turn enables families to stay on the islands, thereby contributing to better age balance (although the population remains an aging one).
- It **generates income and business rates**, supporting essential services, administration and infrastructure (e.g. fire, coastguard, environmental management, health, social services, water).
- It **supports the essentials** of a modern comfortable existence – shops, eateries, health & social services, leisure, trades etc.
- It **provides jobs** for more or less anyone who wants one. The islands enjoy practically full employment.

Smart and local – a joined-up strategic approach

It is worth noting the wider local and regional strategic planning context, which will be referenced throughout the DMP. The *Smart Islands* programme is addressing infrastructure and utilities issues, seeking to model more sustainable and less carbon intensive services. The new *Local Plan*, led by the Council of the Isles of Scilly, sets out the planning vision and strategy for 2015-2030. Regional representation is also provided by Cornwall and Isles of Scilly LEP to government and business through the Strategic Economic Plan and its *10 Opportunities* prospectus.



2.1.2 Technology, innovation and 'smart islands'

Technology offers some opportunities to overcome the constraints of distance, access and communications. But, even with evidence of some success on other islands (e.g. Lewis), technology tends to enable small online businesses to thrive rather than create large numbers of island-based jobs. Economies of scale with external producers, have, in recent years, eroded or threatened many islanders' abilities to compete, e.g. agriculture. And retaining skilled or experienced staff is a perennial challenge. Without enough jobs to employ local people or enough workers attracted from elsewhere – whether skilled or appropriately experienced – to maintain local businesses and services, then community sustainability is at risk – schools, healthcare, social services and crucial trades.

The *Smart Islands* programme, addresses critical utilities and infrastructure needs. Hopefully it will generate additional direct and indirect employment, and is poised to enhance the islands' reputation as a sustainable, 'green' destination by transforming environmental practices. This offers a significant opportunity to position the Isles of Scilly as a leader in low carbon technology and sustainable energy in small communities. It also offers opportunities to develop new skills. And, in terms of external perceptions, there is real potential synergy between this 'clean', 'green' sustainable technology and the beautiful, wild, natural environment. As well as the benefits this will bring to residents, it should also help businesses reduce costs and reposition the image of the islands.

Managed in partnership by the islands' leading agencies with

Hitachi Europe Ltd, the agenda is opportune alongside CloS LEP's strategic priorities, as evidenced in their new **10 Opportunities** publication. One of the 10 is unsurprisingly tourism, and all the highlighted opportunities are relevant:

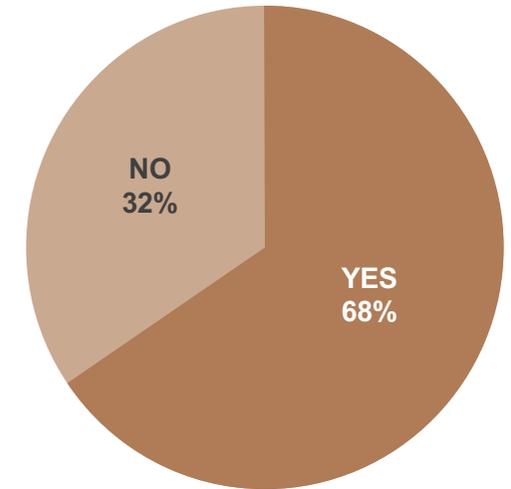
- _ Continued and focused business support – access to funding, marketing investment, STEM skills/interns/career development (tourism, catering, creative industries and related sectors);
- _ Cornwall/Isles of Scilly a post-Brexit VAT system test region;
- _ A sector deal for tourism, along with the devolution of VisitBritain's budgets for overseas tourism.

2.1.3 The markets are changing for Scilly

The Isles of Scilly aren't immune from competitive pressures, made worse by the many lifestyle businesses and considerable number of second homes. Generations of families have provided loyal main season repeat business, insulating the islands from some market forces. Such loyalty has been accompanied by visitors' willingness to endure the inconvenience (in terms of accessibility) and often lower value for money than in comparable destinations. Given the ever-increasing range of attractive destinations on offer, will Scilly's traditional markets remain loyal and visit as frequently? Or might they substitute one or more of their visits with another destination that offers a different take on standards and is easier and cheaper to reach?

2.1.4 The role of culture and heritage

And what of Scilly culture... what does that mean? These Islands of legend are drenched in it (if you know where to look), a



Visitors have said – by more than a 2:1 ratio - that they would consider a winter break in the Isles of Scilly. What do they say would help them decide to come? Better transport and availability (and weather of course).

SOURCE: ISLANDS' PARTNERSHIP VISITOR SURVEY 2016

microcosm history of the British Isles from ancient times, through early Christianity, Vikings and wrecks, the Spanish Armada and the English Civil War, the flower industry, royalty and Duchy, to contemporary rural life. Scilly-style is present and attracts visitors, but is not fully interpreted or celebrated. Set pieces are few. A lack of investment means the Islands' museum is not the jewel in the crown that it should be, despite the wealth of stories and some extraordinary collections.

Scilly is a place for artists, musicians and makers to live, work and be inspired by – but generally quietly – with few celebrated iconic names associated with it. None of this is news. Despite the lack of a structured cultural offer, it is present – carried especially well in the passion and knowledge of the islanders and in the gentle way of life. Attempts to build on this to support community life and sustain tourism are having some success, and are especially well expressed in new themed weeks and festivals, and the cultural calendar is growing (especially on Tresco).

These are all positive innovations, but still lack cultural vision, artistic direction or delivery structure to lift them to the next level. *Cultural Destinations*¹ funding from Arts Council England is an opportunity to focus attention on how to make more of existing cultural assets, and where to plug gaps in order to better attract and meet the needs of new and existing markets, as well as residents.

Whilst not a cultural tourism strategy, this DMP identifies the principal ways in which culture might both drive and support aspects of the destination's management.

2.1.5 Viability

But we do not want to attract so many visitors that Scilly cannot cope and the visitor experience is diminished. This means seeking an optimal, rather than maximum, amount and type of visitors; and, rather than increasing numbers during the summer peak, which is, at times, operating almost at capacity in terms of flights, boat and accommodation, it means focusing on extending the season.

The halcyon days of over 140,000 annual visitors is in the past. It is only in the last two years that more than a decade of decline in visitor volume and value (from around 140,000 visitors annually in the early 2000s to approx. 100,000 today) has begun to be reversed, with increases of 7% and c.3% pa in 2015 and 2016. The tourism industry and markets have changed dramatically and so must Scilly.

We want to retain the serenity, laid-back pace of life, but with the benefit of embracing change, new technologies and attracting new markets. There is no doubt that visitors are looking for distinctive, authentic experiences, often dreaming of unspoilt locations to get away from it all, and we can provide that; but these visitors still expect a level of quality, a real connection to nature and an experience that resonates with the brand promise.

Weather and the consequent poor reliability of transport outside the main season are frequently quoted as the main obstacles to growth

¹ www.artscouncil.org.uk/cultural-destinations



THE GREAT OUTDOORS, 365 DAYS PER YEAR

Even for a destination with strong summer and coastal credentials, the Isles of Scilly can creatively promote its land and marine environment outside of the peak season.

beyond the main season. This represents a mix of passenger resistance and businesses' fear of remaining empty. However, there is evidence of both consumer demand and willingness by some businesses to stay open longer outside the main season.

A recent Islands' Partnership survey (January 2018) found 30% of businesses (largely accommodation) who responded would open earlier in the year; 22% would stay open later in the year; and 12% would stay open year round – depending particularly on more reliable transport accessibility and facilities for visitors being open. It is hoped that the return of a helicopter service will provide new capacity and mitigate some of these weaknesses.

2.1.6 Tourism, culture and the LEP

There are opportunities to encourage young people to participate in internships/STE(A)M¹ with Scilly as the resource. Environmental, marine science, digital and cultural projects can play a major role in supporting and delivering educational initiatives beyond the classroom, e.g. working with artists/ designers to create art and interpretation in the landscape that will raise understanding of environmental and conservational issues.

All of the proposed actions in this Destination Management Plan seek to address the following questions:

- 1. Where does the Isles of Scilly's economic future lie?**
- 2. How can the islands secure a sustainable future for our communities under such external pressures?**

A major part of the answer lies in a healthy visitor economy. Even if a long-term future were to lie in an as yet unforeseen, more diversified economy, the dominance of tourism as the islands' main economic driver and employer dictates that the short-medium-term (and foreseeable longer-term) economic base will remain tourism driven.



CORNWALL AND THE ISLES OF SCILLY

It is vital to acknowledge and integrate the regional and national context into the DMP if its ambitions are to be realised.

www.cioslep.com/strategy/10-opportunities

¹ STE(A)M: Science, Technology, Engineering, Arts, Mathematics.

3. The job of the DMP

3.1 A ROADMAP FOR GROWTH

This DMP is a roadmap for the growth of our visitor economy. It proposes actions to secure sustainable communities for the foreseeable future. The DMP aims to unite not just tourism businesses, but also diverse island businesses and organisations, behind an economic plan to grow the islands' biggest sector, securing a sustainable future.

All sectors relate to the visitor economy to some degree and the DMP links them in a way that creates synergy, largely in terms of the value they bring to the islands' economic narrative, positioning and brand image. A further job of this DMP is to place the islands' cultural heritage front and centre. How can the plentiful (yet buried, often literally) cultural heritage be switched on to help shape a more contemporary and inspiring visitor experience?

But the job of the DMP is not just to set out the mechanics of how to grow the visitor economy. It also seeks to engage, energise and inspire all the potential contributors to help realise the vision. As such, this DMP sets out a refreshed approach to the essential partnerships – a 'permission slip' – for a positive change in culture to accelerate progress. A clear-minded, shared vision and Plan is the only way to fully release the potential in the visitor economy and unlock opportunities to secure further support and investment.

3.2 A MORE PRODUCTIVE SECTOR

Radical thinking and fresh cooperation are needed to improve productivity and competitiveness. Productivity is simply how effectively we utilise resources to produce products & services. Increasing tourism productivity means either providing more services with the same inputs, or providing the same services with fewer inputs. Getting the small decisions right with labour, investment and other resources can deliver big improvements to how we produce. This is essentially about improving Scilly's competitiveness as a tourism destination.

The drive to boost productivity is a cross-cutting/overarching theme in this Plan, and we will work alongside the Cornwall & Isles of Scilly LEP and other stakeholders to model and measure this.



BIG CHALLENGES

4. Issues to address now

4.1 THE MAJOR CHALLENGES DEFINED

Given the vital importance of tourism to Scilly, there are a number of major challenges facing the islands.

4.1.1 A comparatively short season

The lack of a critical mass of activity (accommodation, events, food & drink, packages etc.) outside of the main season results in effectively little or no visible 'shoulder' season/season extension. Whilst the summer can be said to be a week or two longer than other UK destinations, this sharp drop-off in the scale and scope of the offer is an issue when compared with competitor destinations.

4.1.2 An ageing population

This will have implications for tourism employment and is also likely to increase pressure on social and healthcare services. This requires a viable tax base to fund increasing demand.

4.1.3 Land management and environmental conservation

The Isles of Scilly Wildlife Trust manages 60% of the land area. As a local charity it is dependent on raising ongoing funding from donations, legacies and other activities. This means the ability to manage almost 2/3 of the scenic beauty that attracts visitors relies on unreliable funding sources. The important role played by the island's farming community remains equally vital to sustain.

Wider and even more visible conservation is needed. Recognition of Scilly's natural capital and the 'value' case for support – by all beneficiaries, including visitors – needs to be made in new and more expansive ways.

4.1.4 The millennial generation

'Millennials' (born 1982-2004) have more choice, easy booking options, and are less destination loyal. This could threaten the repeat family business that has been important for generations. There is already evidence that the islands have been losing younger visitors (under 17s in a family group and 18-34 year-olds). It also calls into question the islands' ability to attract new visitors, who seek out quality and comfort with style and lifestyle cues. Our current disproportionate dependence on older (55+), repeat (70%) visitors means we will need to work harder to retain not just their loyalty, but also to attract younger visitors who, hopefully, might turn into tomorrow's 'Scilly loyalists'.

4.1.5 Quality with value for money

Even more so than previous generations, millennials expect quality and value for money when they travel. But it does mean standards of quality and comfort that are at least comparable with what they expect at home and what they are offered when they travel elsewhere. Evidence suggests that the Isles of Scilly are not delivering the standards expected.

4.1.6 Experiential tourism

Offering new experiences and improving interpretation of the



destination, its culture, landscape, people and heritage, can make visitors' holidays more fulfilling, increase visitor revenue, and attract new markets, particularly off-season (although this is dependent on access). However, at the moment, cultural heritage is not very visible as a result (visitor surveys indicate) current visitors' primary experiences are more physical than cultural or intellectual (e.g. walking, relaxing, hobby holidays).

4.1.7 An evening economy beyond food & drink

Research shows that visitors would appreciate more to do in the evenings, suggesting a need to complement the natural, tranquil experience with social and cultural activities.

4.1.8 Skills

People with great skills are critical to a premium destination such as the Isles of Scilly. They make a good experience great and, more importantly, underpin the case to come back. Good customer service, efficient hospitality management, and great chefs are just some of the skills required. With Brexit looming, difficulties in recruiting seasonal staff are already being felt.

4.1.9 Housing

Housing availability is vital – both for residents and visitor economy workers. Second homes can both bring visitor revenue in and drive up house prices beyond local first time buyers. If they cannot afford to remain, there is the risk of a generational mainland exodus, most of whom will not return. Adequate housing is also essential for temporary workers, who come to work in the visitor economy. If

businesses cannot recruit such seasonal workers, their viability is under threat. Low quality or no provision from employers is not sustainable – living in tents or glorified sheds is not the answer, even short-term.

4.1.10a Transport capacity and capability

The transport links are not always reliable or sufficient, particularly outside the main season. This is a significant issue for islanders. For visitors, who are spending extra to reach the islands, reliable access – both in and out – is critical. The prospect of being stranded, even if only for one day, can knock Scilly off short break destination shortlists. So too can the time and distance involved off season in getting to Scilly be a deterrent, without convenient air departure point availability or Sunday services (e.g. Southampton for the London-South East market).

Transport to the Isles of Scilly: supply and demand

Of course one of the most obvious areas of interdependence is between visitor numbers and the availability of transport seats to/from the island from the mainland – including the seasonal and week/weekend schedule balance. The discussions revolve around capacity and demand. To be clear, more seats does not in itself generate more demand, even at peak season when demand is high and capacities may be tested. They offer opportunity to exploit/create a rise in demand. It is hoped that a new helicopter service will begin to do this.



CRUISE SHIPS

The islands' economy clearly benefits from the visits made by small to mid-size cruise ships, although their potential impact on existing services and the environment should be carefully managed and monitored.

4.1.10b TRANSPORT CAPACITY AND CAPABILITY

Connectivity & route development: to other modes of travel, e.g. rail, air hubs and carriers, is central to transport planning.

Inter-island: the shortest journeys and the final legs can be the most frustrating – inter-island boat services remain fragmented from the wider transport ecology.

St Mary's Airport: its core viability remains fragile. Traffic growth is the main route forward with no runway extension option.

Freight: a reliable, affordable, fit-for-purpose service is symbiotic to the visitor service.

Penzance Quay: currently unwelcoming, exposed and limited by heritage restrictions.

Leadership: the Isles of Scilly Transport Board should convene to drive this agenda.



4.1.11 Visitor accommodation

Availability has changed in recent years: some serviced accommodation (B&Bs and hotels) has become self-catering. While this may reflect a market demand, it also reduces the demand for air/ferry seats, particularly off- season (as week-long lets mean demand for seats peaks at weekends, with less weekday demand as accommodation capacity is more limited). The knock-on effect of this is to undermine the potential viability of extending air or sea services into the off-season. The common Saturday-Saturday booking week has an inhibiting effect on the short break market as well – a little bit of flexibility will go a long way.

4.1.12 Utilities

Water provision and waste treatment are under severe pressure during the peak holiday season. Improved and more cost-efficient infrastructure will be required both to sustain current peak flows and to cope with growth.

4.1.13 The Scilly brand

A strong, distinctive brand narrative and clear market positioning are important for the long-term health of any destination. The Isles of Scilly has the potential to have a stronger brand – built on its remoteness, maritime heritage, scenic beauty, tranquillity and general pace of life. But the exceptional natural environment and cultural heritage is not always reflected in the islands' environmental management practices, product and experience quality, or service standards. Failing to live up to its 'five star' natural environmental billing with 'three star' standards of hospitality

management and conservation undermines the islands' credibility as a 'five star' experience.

4.1.14 A distinctive cultural heritage

There is a strong Scillonian cultural heritage beneath the surface. But this is not manifest for visitors. Small groups of artists live and work on the islands and can engage with and attract major artists for events/festivals, but a haphazard approach inhibits this. This is due in part to the multi-job reality of local life. As a result, our cultural offer varies in quality – from hobbyist to professional – across a partially planned calendar.

Despite the lack of a structured cultural offer, it is clearly present – carried especially well in the passion and knowledge of the islanders and residents and in the gentle way of life, the inter-island bonds and rivalries. Attempts to build on this to support community life and sustain tourism are having some success, and are especially well expressed in themed weeks and festivals that are popping up across the season – the cultural calendar is growing (especially well on Tresco). These are all positive innovations and instinctively on the right path, but still lack cultural vision or artistic direction to lift them to the next level of ambition and quality, and also the delivery structure to make it happen. Section 6.2 expands on this key element.

4.1.15 Quality experience starts with the hygiene factors

A premium visitor offer can deliver magical sights, superb events, great food, and a warm welcome. And yet it can still fall down on



ICELAND ACADEMY

Iceland has released their effervescent personality through a series of short, fun films that have gone global and helped to define its destination brand. And it is worth viewing the film to see what the teacher is pointing at.

www.inspiredbyiceland.com/icelandacademy/

what are the seemingly basic underpinnings of a visitor offer. This Plan has a focus on a number of these areas as they have to consistently meet the expectations of visitors in a competitive marketplace. The islands do not want to become a series of signposts, interpretation panels and visitor information points. However, the current provision and its maintenance can be improved, with imagination, visitor empathy and a connection to the key narratives of the Isles. So a destination's infrastructure, core services and design of public spaces are all vital to create a sense of place, reinforce the welcome and ultimately help visitors get the most from their time with us:

- _ Signage and interpretation that makes connections and answers the questions first time visitors will have;
- _ Information and orientation that informs and drives purchasing and exploration;
- _ Cleanliness and responsibility asked of visitors by first setting the standard (from the humble park bench and public toilets to beaches and historic sites);
- _ Road management – measures are needed to reduce and control the levels of traffic (and subsequent air and noise pollution) in Hugh Town. Possible solutions may include access reconfiguration, car share scheme, electric vehicles.
- _ Transport connectivity – airport (airplane, helicopter), shuttles, ship, boats, buses etc. – through simple, accessible information and provision using the media that visitors want, whether that be an A-board or an app.



HUGH TOWN

Sympathetic and intelligent visitor management and planning – new businesses, signage, events, cruise ship management etc. – is key if this hub, encapsulated by its High Street, is to be a virtue and not a frustration for some visitors (and residents and businesses too).

BIG OPPORTUNITIES

5. Outstanding assets

5.1 INHERENT ASSETS

The Isles of Scilly are fortunate in **four** significant ways:

5.1.1 Premium product

The Isles of Scilly have a longstanding reputation as not only an attractive destination, but also as a premium one. Remote beauty, maritime character, latent cultural heritage, tranquillity and pace of life are a heady cocktail that is becoming increasingly scarce.

Visitors have so far been largely prepared to pay a considerably higher price to visit the islands than many other destinations. Their uniqueness has led to the islands' economy being heavily dependent on tourism.

5.1.2 Protection from 'over-tourism'

Attractive destinations around the world are becoming increasingly congested, primarily in peak season, largely as a result of social media driven tourism. This is destroying the visitor experience, testing residents' tolerance, and threatening environmental degradation. The Isles of Scilly are fortunate in that, being islands, access is limited by air and sea services to the islands.

This brings with it other problems – of viability outside the main season and capacity constraints in the main season – but it also

enables the islands largely to control visitor flows at manageable and desirable levels, although capacity and congestion issues are emerging around the impact of cruise tourism.

5.1.3 Nature that offers much more than views

The natural heritage of the Isles of Scilly is a precious commodity to conserve, celebrate and promote – landscape, marine, wildlife. This is recognised with many designations but rarely appreciated as the highly-rated AONB it is. There is an opportunity to make it more than a fabulous backdrop to relaxing, walking or water sports. It can be central to richer visitor experiences and understanding of the islands. Section 6.1 expands on this – it is time to turn background to foreground.

5.1.4 Culture and heritage

The cultural heritage of the Isles of Scilly is an asset awaiting release, but leadership has been missing. Through partnership working and with appropriate resources, the DMP can play a central role in driving new thinking around culture and heritage as it relates to tourism.

5.2 EMERGING OPPORTUNITIES

Based on these inherent assets, there are big opportunities to develop the product offer, and in turn the Isles of Scilly brand, in a way that reflects the existing distinctiveness and strengths of the islands' offer. Market growth can be achieved in part by focusing in high-potential areas. Section 6 explores a few of these – the great archipelago, culture & heritage, wellness, seafood, smart tourism.



6. Spotlight: areas of real potential

6.1 ENGLAND'S GREAT ARCHIPELAGO

The Isles of Scilly is fragile, unique, different. Aside from the islands being only 28 miles off the mainland English coast, why should we not seek to place it in the same breadth as the great archipelagos, reefs and rare habitats of the world? By shouting more about the environmental worth of Scilly we can help to make it more valuable, and therefore, valued – by residents, visitors, investors. This can grow and open up new markets – from natural historians to conferences – but the prize is really to engender a sense of privilege in visiting these islands.

'This is wonderful – help us keep it that way.'

Visitors to the Isles of Scilly just have to be that little bit more aware, a little bit more respectful, to become a bit more like a Scillonian. That is, if we all do the same. The responsibility is an opportunity, and one through which visitors can enrich their experience. The example can be set from their first enquiry to after they leave – consistent messaging, backed up by the knowledge, policies and behaviour of businesses and residents.

Northlink¹, the ferry operator between the Scottish mainland and Orkney/Shetland have clear and visible environmental policies and practices which help to set the tone and start the visit before landing. Finding biodegradable alternatives for straws, bags, drinking cups and snack dishes are all accessible and affordable.

The Western Isles' Comhairle nan Eilean Siar *Final Straw* campaign² – with the first Scottish council to pledge to go plastic straw-free – displayed a bit more personality in its messaging. Examples are local. Surfers Against Sewage is a 'ground-up' campaign that is now seeing mainstream adoption, no doubt helped by the 'Blue Planet II' factor in 2018. The issue of (marine) plastic waste is being tackled at destination gateways across the world – Iceland, Ullapool, even landlocked Rwanda. The link to the *Smart Islands* initiative is clear. The natural and authoritative voice to project these new conservation messages (alongside many others) is the Isles of Scilly Wildlife Trust, and it needs our collective support to do so. The Trust is already campaigning to achieve Plastic Free Coastline Status, and national plans are being updated³. Scilly needs to be focused, consistent, bold, positive in programming and planning in land management. As a local charity, unlike other competing charities like RSPB which has a national model, the support of visitors is essential – so they need to know what is at stake, all the vital work that is done, and how they can become a bit more Scillonian by helping out, even in simple, little ways. The Isles of Scilly has great control of its entry points... even cruise ships. Let's use it to save the planet, one island at a time.

1 www.bbc.co.uk/news/uk-scotland-north-east-orkney-shetland-42777402

2 www.bbc.co.uk/news/uk-scotland-highlands-islands-42731582

3 <http://bit.ly/2mkBVFx>



SURFERS AGAINST SEWAGE

What Scillonian innovations and values could be encapsulated in a 'green charter' that visitors could pledge into?

What could the cultural response be - artists in the landscape, making, workshops?

Image: Surfers Against Sewage

6.2 CULTURAL HERITAGE: A GAME-CHANGER?

Scilly was one of only a handful of English destinations to be awarded **Cultural Destinations** funding. This has provided the opportunity to map the islands' rich, but at times hidden culture and heritage offer and to work with partners, cultural entrepreneurs and local artists to test and evaluate new ideas. The aim is to make cultural heritage more visible within the offer – a manifestation of the brand.

This programme will start the process of looking at how to integrate Scilly culture at all visitor touchpoints – physically and virtually – particularly appealing to new markets looking for distinctive experiences. We can look to develop culture short breaks with strong events and an education/wellbeing offer for the accessible southern England market, especially in the shoulder season.

Scilly needs to be ambitious in building new relationships and sourcing potential funders including Arts Council England (ACE), Heritage Lottery Fund (HLF), Google Arts & Culture, HE institutions (e.g. Newlyn Arts School, Falmouth University), Cornwall arts organisations/consortia, and even further afield e.g. Bristol Old Vic theatre school. These partnerships will need to link into the vision, being more ambitious and culturally focused to effect long-term change, investment and new product appealing to new markets.

We need to explore HLF Resilience funding options (£250k maximum bid) to look at a model to build resilience in the islands' heritage via governance, advocacy etc., e.g. more than a 'Friends

of Scilly', and to support the development of the museum. Such an investment would also build resilience and capacity in the management of the natural and heritage environments.

Scilly provides an idyllic backdrop for artists and could host an artists-in-residence programme, working with local artists' to develop skills, and provide opportunities for collaborations that may lead to new cultural product. A longer-term aim could investigate how to 'curate' the islands, and how this feeds into the brand and season extension. There is a need for some credible signature moments, not just one-offs, over a 5-10 year period. Otherwise it is culture as wraparound (essential but slow burn) rather than as a driver. Creating an approach that works on a small, environmentally sensitive archipelago with transport issues is a challenge – exactly the sort of challenge that artists can respond and find solutions to.

A Scilly Manifesto could extend to becoming a world leader and exemplar in exactly this kind of activity with Scilly 'exporting' its SMART knowledge internationally. How? *Cultural Destinations* mapping and pilot projects can make the case for funding applications to ACE's new Project Grants, but also other agencies, trusts and foundations with matching cultural/ environmental interests such as Julie's Bicycle, Wellcome Trust, Paul Hamlyn Foundation, and ArtAngel type commissioning bodies and business. This can work where there is an exciting match between the creative, scientific, environmental and tourism agendas.

1 www.juliesbicycle.com/news/curating-the-natural-world



CORNWALL 365

Cornwall 365/Creative Kernow are a natural partner for Scilly through the Cultural Destinations Programme. Arts Council England expects collaboration across projects.

Image: Creative Kernow

6.3 WELLNESS – A SCILLONIAN SPECIALITY

The 6 pillars of wellness – cultural, physically active, active outdoors, spiritual, learning & development and spa & beauty – all have a good fit with the core Scilly offer. The good news continues:

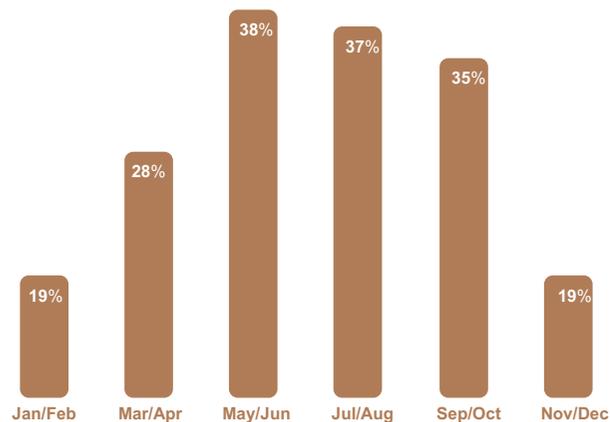
- Demand is slightly less seasonal than other leisure trips;
- The most important factor in decision-making is “the natural setting of the place” (26.9%) followed by “good quality spa facilities & treatments” (13.1%).
- Accommodation quality and the quality and healthiness of food are also important.

As the National Coastal Tourism Academy (NCTA) report states: *“Current estimates suggest that demand for wellness breaks and holidays will outstrip supply in the next 3-5 years, so businesses and destinations recognising the potential of this lucrative market segment first will reap the biggest rewards.”*

In the UK, 1 in 5 people take at least one dedicated wellness break annually, with significant growth in younger demographics (nearly a third of all 18-34 year olds), and those living in London (1 in 4). However, with only an estimated 8% of these wellness breaks currently taken in coastal destinations (albeit representing over 1 million staying trips per year), there is significant opportunity for growth in coastal wellness breaks and holidays.

This growing market is not antagonistic to traditional markets. In fact, there is already evidence from current activity on the islands

that it showcases the best of the islands and has complementarity with other parts of the offer, e.g. remoteness, food & drink, outdoors, events. In other words, the wellness market can enhance the brand rather than erode or confuse it in the minds of current and prospective visitors. As the UK (and beyond) shifts, thanks to awareness and public policy, the desire to combine a break and wellness is set to continue to rise, whether a primary reason to visit or as a secondary driver. We Scillonians are reportedly more engaged in lifelong learning than anywhere else in the UK, so the idea of the islands being a base for ‘cultural’ education – retreats / courses (weekdays for professionals and adapted at the weekends for amateurs) has real potential.



Net likelihood to take a wellness break or holiday (by month)

Source: *Health & wellness tourism, National Coastal Tourism Academy (NCTA)*



THE ESCAPE ISLANDS

“Getting away from it all, and back to yourself”
Guardian Travel, speaking about the wellness break market

Does the work of Karma St Martin’s, Adventure Scilly and the Tresco Estate (amongst others) already provide a blueprint for the Isles of Scilly and the burgeoning wellbeing market?

IP could join NCTA to exploit peer to peer learning, live research projects, and better resource/funding targeting

6.4 AMBITION TO BE THE SEAFOOD ISLANDS

The food and drink offer on the islands is good overall, and in places it is excellent. Improvements can always be found, as can ways to showcase and promote the offer. Individual restaurants – from the Star Castle Hotel on St Mary’s to Bryher’s Crab Shack – join together through the Taste of Scilly campaign, festivals and other promotions.

The rest of the UK is also very busy building its own food tourism propositions, including on the islands’ doorstep. Whether it is the mid market Rockfish fish & chip restaurants of chef entrepreneur Mitch Tonks (www.therockfish.co.uk) or the Michelin-star quality (and celebrity star power) of Nathan Outlaw, there is recognition that quality and brand in seafood is now a very competitive marketplace.

Scilly is responding. The Taste of Scilly Festival 2017 was described by The Independent as “the ultimate foodie celebration”. This is exactly the kind of product innovation, with a distinctive Scillonian delivery, that can make its mark in the minds and on the palettes of prospective visitors. Destination restaurants can require six-figure investment, and the current seasonal limitations of the islands make this option very challenging, if not necessarily impossible.

An alternative is the festival model, already established. But this lower-risk, high-impact and time-specific/bookable offer can evolve in a number of interesting directions. It is important to innovate, and that means testing new ideas, and engaging with new people. It also offers another opportunity to create campaignable reasons to visit beyond the peak season.



Southend is rediscovering its coastal food & drink offer

One such option is the popup, and a high-profile recent example is Jamie (Oliver) & Jimmy (Doherty)’s pop-up café on Southend Pier. This is tied into a Channel4 TV Friday Night Feast series, which of course helps. Celebrity guests are augmented by audience members/diners who apply for places. The mix of food, location and celebrity is one that Scilly could take and give its own twist on, with or without the TV cameras.



TASTE OF SCILLY

Everybody is doing it, but can locally sourced food & drink, prepared to a high-standard using distinctive menus and events separate the Isles of Scilly – in an increasingly competitive and epicurean leisure market?

We think so.

6.5 SMART ISLANDS, SMART TOURISM

The *Smart Islands* programme is not the magic bullet solution, for technology, infrastructure or tourism. It is an important contributing factor for all of the above. In other words, with the help of initiatives like this, we have an opportunity to make tourism smart.

Smart Islands plans to (sustainably and affordably) tackle some key infrastructure and utilities issues. It also seeks to provide a model for how the islands can profit from a rapid transition from being carbon intensive to having a low carbon footprint¹. *Smart Islands* will soon shift from a strategic vision to a very real programme of change, and potentially a fundamentally new way of thinking and working across the islands. This will form a part of the reinforcement and renewal of the islands' brand, but it can – it must – connect in clear and tangible ways with our tourism offer.

The shared focus is there: driving growth, economic stability, and creating the conditions for change. The islands' tourism – with a (contemporary) cultural offer and its position as a distinct natural archipelago has a lot to add to the *Smart Islands* agenda. It can contribute to modernity, resilience and future-proofing, e.g. knitting all the assets together to drive productivity in a **virtuous circle model**, rather than one of decline.

The digital improvements at the heart of *Smart Islands* will inevitably see more progressive adoption of new practice, tools and

shared infrastructure, thus creating better responsiveness to market trends. Now is the time to commit to smart tourism, defining how to respond as one, in an open environment to test and develop ideas and initiatives. In this context, we need to answer the question:

What should England's C21st 'Smart Island' look like in tourism terms?

This needs to address the view from local residents and businesses but also visitors. Can we ask tourists to help the islands become a carbon neutral destination – and make a virtue of it as part of the visitor experience? If you would pay a bit more to protect a coral reef in Australia, then why not England (see section 6.1)? The pitch for this is predicated on an understanding of the rich value of the natural and cultural heritage of the islands, and that the islanders and our leaders visibly value it in practice. *Smart Islands* is central to helping make this case to visitors, alongside the agencies that conserve and enhance our natural environment and visitor offer every day.

¹ www.cioslep.com/isles-of-Scilly/smart-islands



CLEAN WATER – SERVICES AND OFFSHORE

“Despite being surrounded by ocean, drinking water is expensive and energy intensive to deliver on the Isles of Scilly. Dealing with sewage is equally challenging due to the sensitive nature of the unspoiled and highly protected coastline. Through sewage collection, renewables and energy balancing, the smart islands programme is seeking a sustainable approach to water needs.”

<https://smartislands.org/#water>

7. Ambition

If we collectively address the identified challenges and seek to realise the opportunities, then the prize is a healthy, sustainable tourism industry that's fit for the future – and the consequence, we believe, will be **incremental growth**¹.

This growth, if it were in line with national tourism policy, would equate to 5% per annum. By 2022, this would result in a cumulative increase of 34% in the value of Scilly's visitor economy and additional local expenditure of £12m. If we were more ambitious, annual growth of 7% would result in a cumulative increase of 50% in value by 2022 and an additional expenditure in the local economy of £17.5m.

Given existing circumstances and constraints, incremental growth is the most realistic option. This is nevertheless a highly ambitious vision to deliver significant and sustainable impact.

It reflects not just the islands' physical constraints on growth, but it also recognises the need to manage growth in order to retain the islands' special 'sense of place', which is an essential part of their charm. A sensitive balance needs to be achieved between managing growth, conserving the islands' natural environment and special character, and maintaining a sustainable community.

Quite simply, if these challenges are not addressed effectively, then the very sustainability of our communities are under threat across the Isles of Scilly. We cannot let tradition stymie innovation. There is a significant opportunity, and the time to seize it has to be now.

“A sustainable future for the Isles of Scilly must embrace the social needs of the residents, the importance of a thriving economy, and the precious natural environment. Without all three being planned for, a viable future for Scilly will be in doubt.”

Island Futures: a strategic plan for the Isles of Scilly, 2014

¹ This aligns to the scenario option defined by Blue Sail as 'Building Momentum'.



SOLUTIONS

8. Strategies for a sustainable economic future

8.1 A UNIFIED APPROACH

As this DMP argues, a step change is required – taking a positive, shared programme forward to effect the economic growth and sustainability essential to the islands' future. The Isles of Scilly has so much that is distinctive, and that is the heart of the brand.

Our values must underpin everything we offer visitors, and three guiding principles inform the approach that should be brought into the foreground of how we go about growing our visitor economy – our modus operandi – as set out in the aims and objectives to follow. This approach can then, in fact, must, reflect the specific micro and macro factors that shape the capacity and capability of the Isles of Scilly as a destination.

8.1.1 The Isles of Scilly way

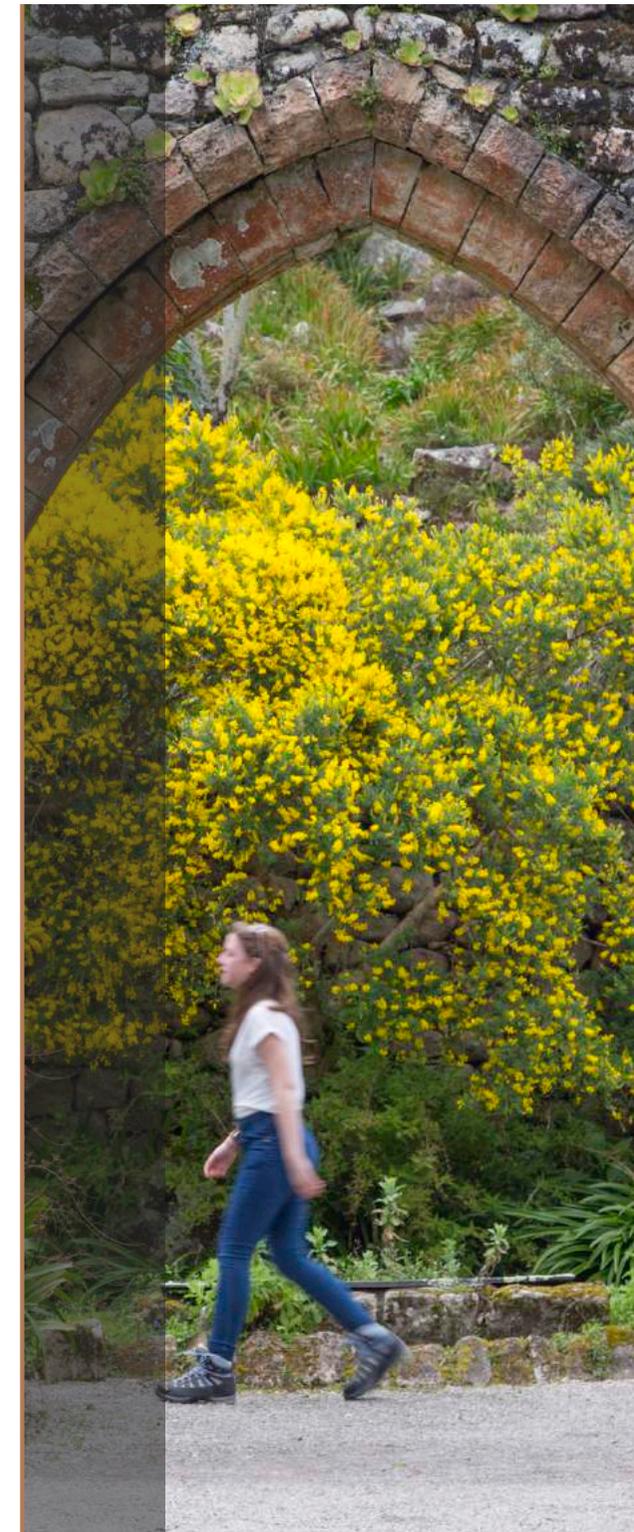
This is simplicity itself (often described as 'living the brand'). Shared ways of thinking need to be applied in **planning and delivery** by everyone who engages with visitors, throughout their experience. With a clear vision, tourism leaders, businesses and wider community can make a real difference. Let's keep posing the question: How would Scilly do that; or what would Scilly do? Scilly is special – let's embrace that.

8.1.2 The Isles of Scilly standard

This is a more detailed **quality programme**, based on a set of standards to aspire to and maintain. These can be very specific, e.g. accommodation quality definitions, online/on island information and booking provision, environmental responsibility, on island transaction and so on. What underscores this are quality targets that every tourism business, whatever the scale, should sign-up to and support. Collectivism is vital here, and as a small community we have an opportunity to positively impact the whole destination in a way that will secure raised standards for the long-term.

8.1.3 The Isles of Scilly voice

In recent years we have developed a much more coherent, consistent and engaging voice through **marketing communications** campaigns. This voice is heard much more clearly with our partners, local stakeholders and most importantly with target markets. Some of the actions in this Plan will necessitate an evolution of the 'Scilly voice', as it seeks to attract new, next generation markets and respond to changing market demands. In the next few years there should be exciting new innovations and services to shout about, and these can be done with a distinctive Scillonian personality that builds on the professionalism of current destination marketing communications activity. These are all component elements of building (and living) the Scilly brand.



8.2 PRODUCTIVITY GROWTH IN TOURISM

8.2.1 Agile and adaptive planning

Everything flows from the economic imperative of productivity in the visitor economy. The following strategic objectives and Action Plan seeks to address these imperatives.

The drive to develop an agile planning and delivery model with productivity measures and controls are embedded throughout this DMP and its Action Plan, linking quality and skills¹, strategic planning and business efficiency.

It further illustrates the interdependence of many of the key development areas for the visitor and wider economy of the islands, above and beyond strong leadership and management.

As an island destination, we have to factor in more critical elements than more traditional destinations. That said, the complexities and compromises of an island economy also bring benefits, in managing and monitoring visitor levels and patterns.

The key issues are complex and interconnected. Some can be fully addressed by the islands' tourism community and partners, others are beyond our collective control, but not influence.

8.2.2 Strategic priorities

The two infographics overleaf – introducing the aims and objectives – set out how these critical elements have been categorised into 14 distinct but cross-cutting priority areas. This is important to enable clear-minded, targeted and measureable programmes, balancing ambition with realism.



SQUARE DEAL FOR HIGH STREET

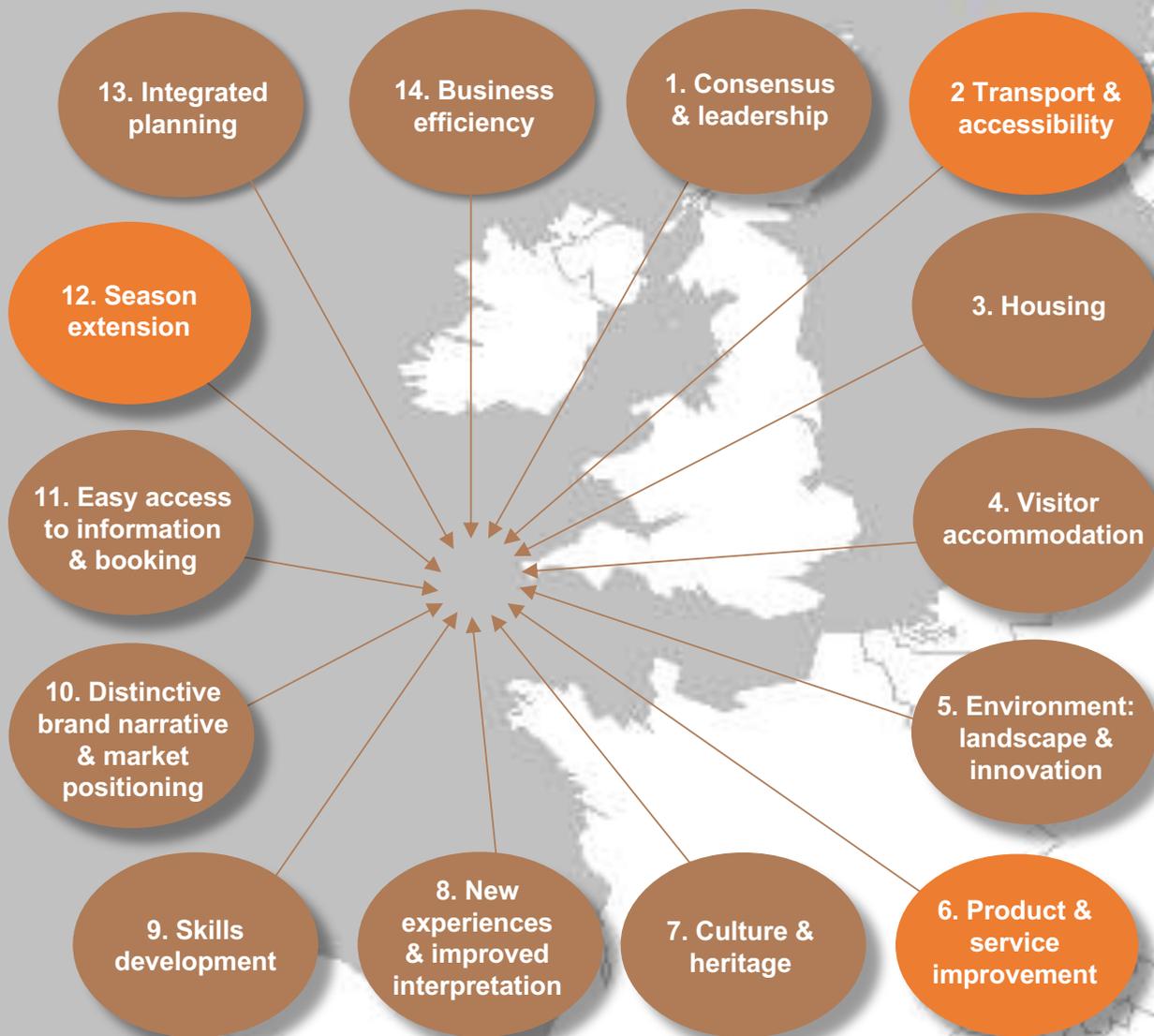
Following a similar project in Iowa, US firm Square worked with the North Wales town of Holywell to transform its ability to handle card transactions after the last local bank branch closed. As independent retailers renew, Holywell now aspires to be a 'digital town'.

"I didn't really realise how many people would want to pay by card until I set up my Square Reader."

Image: <https://squareup.com/gb/townsquare/square-holywell-digital-town>

¹ CloS LEP Employment and Skills Strategy, <http://bit.ly/2EdceIM>

9. Strategic priorities



9.1 STRATEGIC OBJECTIVES CLUSTER

1. Can the key players increase levels of collaboration around a shared vision and plan, with clear and mandated tourism leadership?
2. How can we secure a year-round, reliable, commercially-viable transport service, that works for our communities and visitors alike?
3. How can the lack of housing stock be addressed, given our reliability on seasonal staff (mainland UK, overseas, especially EU post-Brexit)?
4. How can the trend towards self-catering be managed to retain a strong serviced accommodation offer – vital for short-break and off-peak season visitors?
5. Energy, water and waste management need creative solutions to the pressures tourism adds, but what can the sector do to help, and lead the way in signposting us as a 'green' destination?
6. How can we improve the offer to maintain the islands' existing market and attract the next generation?
7. How can the arts and cultural heritage distinctiveness of the islands be brought to bear to build the brand, develop new product?
8. How can the appeal to visit / return be enhanced through developing its evening offer, events, new experiences and interpretation of the islands' culture, heritage, natural environment and people?
9. How can we better attract, retain and develop the critical skills needed to underpin an outstanding destination's reputation – e.g. top quality hospitality, customer service, and chef skills – and therefore minimise recruitment and training costs, particularly for seasonal staff?
10. How can the brand appeal – remote, maritime, scenic beauty, tranquil – be better protected where the tourism product and experience quality, and service standards, fall short of contemporary visitor expectations?
11. Whether traditional visitors or the significant, emerging millennials market, we all expect access, information and one-touch/swipe booking. This is essential for our future competitiveness, but we currently fall short. What quick wins and longer-term responses can turn this weakness into a strength?
12. Season extension sits alongside transport & accessibility and improving the quality of the visitor experience as the islands' most critical tourism challenge. Marketing alone cannot deliver this, given the transport (routes, capacity etc.), accommodation and wider provision weaknesses in the off season.
13. It is axiomatic that tourism issues should be considered as central to the (statutory) Local Plan. How can accommodation and development planning, land management and transport gateways/ systems (including the mainland) effectively inform and be informed by the tourism sector?
14. How can the variety of tourism and leisure businesses develop more operational, environmental, and communication improvements through individual, supported, collaborative and digital means?

9.2 STRATEGIC OBJECTIVES: THREE PRIMARIES

TRANSPORT AND ACCESSIBILITY

Can we secure a year-round, reliable, commercially-viable **transport** service which:

- _ Connects the islands better to the mainland in a way that markets will respond to;
- _ Connects all the islands together in a way that delivers the right services and clarity for visitors;
- _ Has the potential to support season extension and peak season capacity issues;
- _ Will be responsive to visitor trends over time?

SEASON EXTENSION

How can these be mitigated to enable vital season extension?

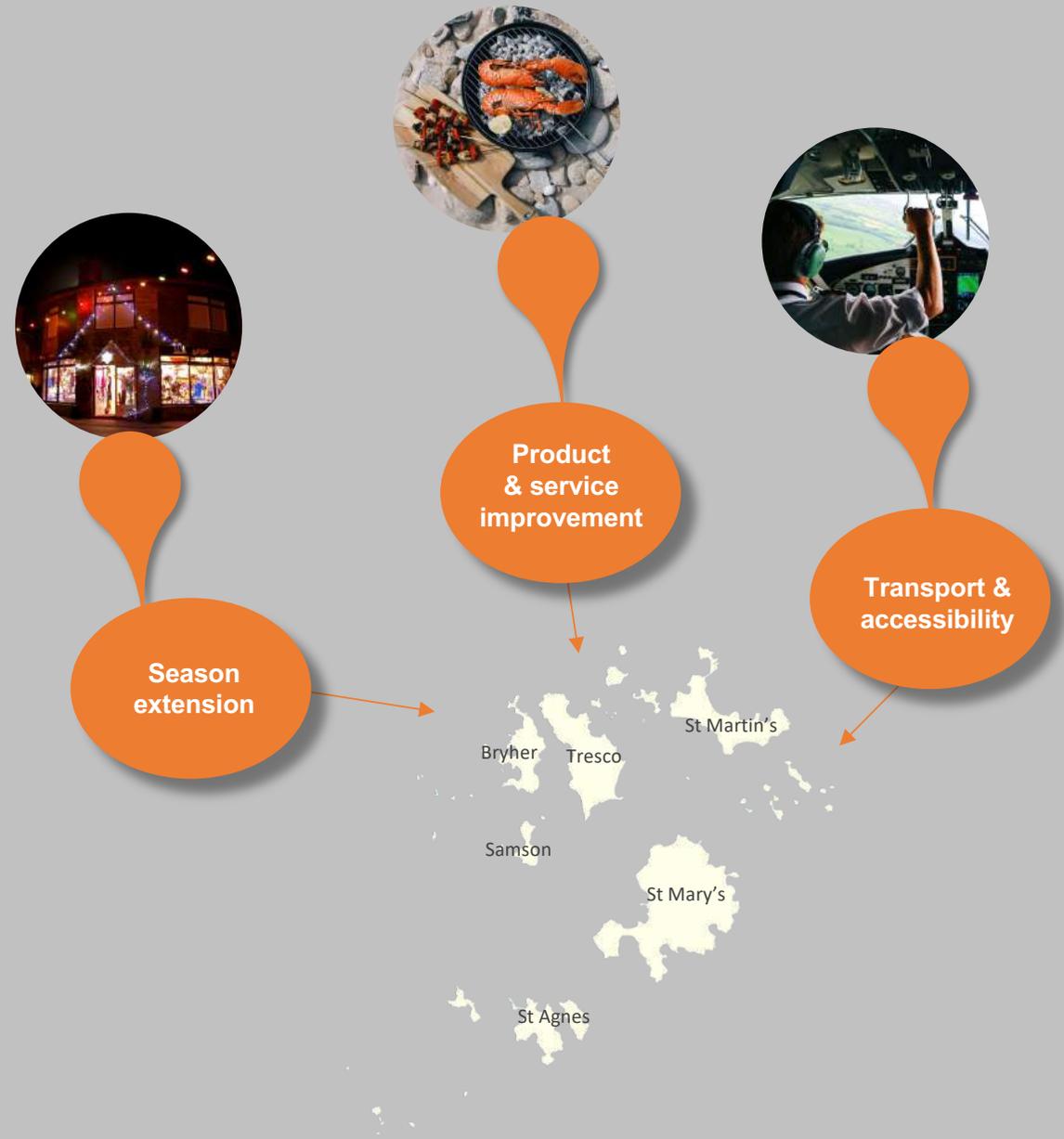
- _ Accessibility
- _ Accommodation offer – serviced vs. self-catering
- _ Events outside peak season
- _ Packages outside peak season
- _ New routes, e.g. Southampton
- _ New services, e.g. ISSC helicopter service
- _ Targeted marketing campaign
- _ Reverse Scillonian III weekend sailings
- _ Introducing Sunday flights
- _ Short break accommodation

PRODUCT AND SERVICE IMPROVEMENT

How can we improve the offer to maintain the islands' existing market and attract the next generation, to:

- _ Develop 'Scilly standard' quality scheme and take-up
- _ Develop minimum operating standards for operators
- _ Package Scilly's off-season offer more effectively
- _ Develop improved system for planning, accessing and booking inter-island boat trips

And commit for the next three years to these areas.



10. Aims and objectives to address the priorities

The following strategic aims and their objectives set out a series of recommendations. A supporting Action Plan (to be published) will contain targets, measures, timeframes and responsibilities for delivery.

10.1 CONSENSUS & LEADERSHIP

10.1.1 Aim

We want to work towards realising a singular vision that connects with the wider strategic plans for the islands – Local Plan, *Smart Islands*, Island Futures etc. – based on an agreed and understood mandate for tourism leadership by Islands’ Partnership as the voice of the islands’ predominant economy.

10.1.2 Objectives

1. Secure the approval and adoption of the Action Plan for the Destination Management Plan across all key agencies and the wider Islands’ Partnership membership and island residents.
2. Engage with *Smart Islands* initiative to extend the principles and vision at a strategic and operational level across all tourism operators and businesses on/working on the islands.
3. Ensure that the Local Plan and its supporting policies positively effect infrastructure and investment planning for tourism and communities in harmony.

10.2 TRANSPORT & ACCESSIBILITY

10.2.1 Aim

Build reliability, accessibility and bookability through the entire transport offer, with market research informed investment and development to tailor service frequency, reliability, information.

10.2.2 Objectives

1. Support the current assessments for a Scillonian IV ship.
2. Support the launch of a new helicopter service.
3. Convene and re-establish the leadership role of the Isles of Scilly Transport Board to address identified challenges and positively influence the local transport agenda.
4. Develop improved system for planning, accessing and booking inter-island boat trips.
5. Test the potential and progress the potential reintroduction of the Southampton air route.

10.3 HOUSING

10.3.1 Aim

We want to have sufficient volume and quality of tourism staff accommodation to attract and retain seasonal/other employees.

10.3.2 Objectives

1. Monitor and inform the development of a new Local Plan, notably the provision of adequate housing for employees as a condition of approval for new tourism businesses.
2. Explore options to use unoccupied accommodation, working with local stakeholders.

10.4 VISITOR ACCOMMODATION

10.4.1 Aim

We want to have a balanced, diverse mix of quality accommodation that serves changing visitor markets, encouraging year-round visits.



10.4.2 Objectives

1. Explore options to increase short break opportunities within existing accommodation stock (e.g. when self-catering units are unoccupied – off-season). Ensure optimum availability of accommodation for off-season growth. (Note: this may mean requiring unoccupied commercial property be available for rental for a minimum no. of weeks pa.)

10.5 ENVIRONMENT: LANDSCAPE & INNOVATION

10.5.1 Aim

We want to position in principle and practice the Isles of Scilly as an environmental treasure – England’s Great Archipelago – an oasis that visitors can enjoy and help to secure for return visits and future generations.

10.5.2 Objectives

1. Support and inform the *Smart Islands* programme’s plans to reduce the islands’ carbon footprint, address water provision and waste treatment, linking them to more innovative practice with tourism operators (‘Scilly standard’).
2. Develop a practical promotional campaign for operators to reduce their environmental impact and water consumption as a Scilly standard, e.g. electric cars, rooftop/kitchen gardens, maritime agriculture/fisheries, recycling, plastic use reduction, renewable power sources.
3. Develop a practical educational campaign for visitors to reduce their environmental impact and water consumption, raising awareness of environmental/utilities pressures.

4. Explore options for a ‘Scilly Pledge’/green charter for visitors and the potential for a visitor contribution, and how it could be implemented and managed.

10.6 PRODUCT & SERVICE IMPROVEMENT

10.6.1 Aim

We want to creatively and continuously develop the offer in areas that resonate with traditional, emerging and potential markets – raising service levels across the islands and developing/launching new products across the year.

10.6.2 Objectives

1. Develop ‘Scilly standard’ scheme (including quality measures, local knowledge, cultural concierge) for key tourism businesses, e.g. accommodation, visitor attractions, eateries, guides.
2. Develop minimum operating standards for all accommodation operators, in order to encourage quality improvement.
3. Extend ‘Taste of Scilly’ to more businesses and to include more local produce sourcing.
4. Explore options to develop the wellness market offer further, e.g. spa packages, whole island treatments and activities, building on current strengths, including potential new spa attraction.



ST. MARTIN'S VINEYARD, WINERY AND VISITORS CENTRE

From humble beginnings as a holiday hobby, in just over 20 years, Val & Graham Thomas now run a working vineyard producing five varieties of wine, visitor tours and tastings and opportunities to purchase from the visitor centre/shop.

Image: www.stmartinsvineyard.co.uk

10.7 CULTURE & HERITAGE

10.7.1 Aim

We want to create a sustainable, engaging and distinctive year-round cultural offer that benefits locals as well as attracting visitors.

10.7.2 Objectives

1. Update mapping of current culture and heritage offer across the islands to understand gaps and potential opportunities.
2. Identify current and potential event/specialist course organisers/operators and their product viability.
3. Set up a *Cultural Destinations* working group to create, deliver and evaluate new/enhanced cultural initiatives/events: identify current & potential event/niche operators, product viability, including season extending programme.
4. Build a working partnership with the Cornwall 365 Cultural Destinations consortia to identify shared learning, joint projects, maximising limited resources.
5. Identify and pursue technology and skills needs, e.g. listings platform, cultural concierge programme.
6. Develop a strong cultural narrative and Scilly brand key messages for the islands that are implemented across all marketing and communications (possibly in partnership with Julie's Bicycle?).
7. Undertake a feasibility study into a refresh of the museum offer.
8. Invite artists (paid) to respond and generate a bank of ideas, including artist-in-residence.

10.8 NEW EXPERIENCES & IMPROVED INTERPRETATION

10.8.1 Aim

New experiences should be developed, which are based on existing assets and reflect the Isles of Scilly's 'sense of place' (e.g. themed trails, guided walks, activities et al).

10.8.2 Objectives

1. Map the dense array of historical sites and package information in a form that visitors can engage with, and tourism operators can disseminate.
2. Informative, but unobtrusive, methods of interpreting significant sites and cultural heritage should be devised for visitors around the islands, without destroying the sensation of emotional tranquillity or intruding on the unspoilt natural environment.
3. Install tastefully designed, environmentally coherent signage to identify and interpret key visitor attractions, trails and facilities (e.g. heritage and neolithic, sites, trails et al).
4. Events, which reflect the Isles of Scilly's 'sense of place' and appeal to the islands' visitor profile, should be developed and trialled to attract visitors off season (e.g. build on the success of the Folk Festival), in order to maximise the opportunity for attracting off-season business. This will depend on three things: reliable access, accommodation capacity, capacity and capability of islanders to deliver).



RARE AND DELICATE HABITATS

The Isles of Scilly can be justifiably represented as an important environment for the nation. As such, this has conservation action, and tourism and communications, implications and opportunities.

5. Look to build on the wellness assets across a number of islands to offer a sub-brand offer that uses the whole landscape assets as 'activity and treatment rooms'. (Supporting the existing strengths of the Tresco (Estate), Adventure Scilly and (Karma) St Martin's in particular to build the islands' profile and reputation.)
6. Attract a 'signature' fish presence that has a national profile – possibly through festival/seasonal/pop-up interventions before considering a permanent 'signature' restaurant. (As well as enhancing the islands' destination appeal as the 'Seafood Islands', this would also reflect the islands' longstanding maritime heritage, and reinforce a core element of the brand narrative.)
7. Develop themed trails (e.g. wildlife, heritage, maritime et al) around the islands, for self-guided, locally trained tour guides.
8. Develop a series of new evening activities (e.g. from boat safaris and 'dark skies' tours to cultural evenings and communal dinners).
9. Develop niche opportunities in the business tourism conference market, notably small-scale environmental and retreat/team-building.

10.9 SKILLS DEVELOPMENT

10.9.1 Aim

We want to build a reliable, resilient and high-quality permanent and seasonal tourism workforce that has, and can develop, the skills necessary to serve an ever-more demanding market.

10.9.2 Objectives

1. Undertake a skills audit to identify SME skills gaps and skills development needs in critical areas (e.g. chef, customer service, guiding, digital).
2. Ensure staff accommodation requirements are addressed in the implementation of the Local Plan, in order to maximise the chances of retaining staff (either year-round or, more realistically, on a repeat basis in subsequent years).

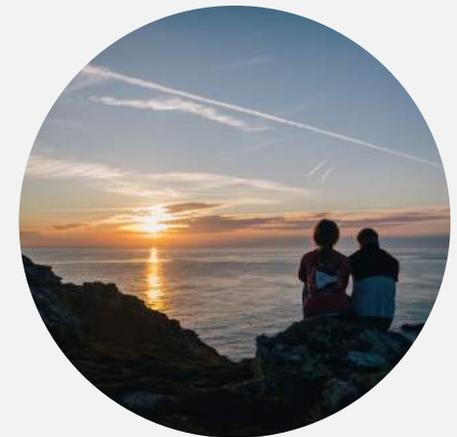
10.10 DISTINCTIVE BRAND NARRATIVE & MARKET POSITIONING

10.10.1 Aim

We want to occupy a positive, high-profile place in the minds of target markets, operators and partners with a powerful, dynamic brand, supported by personality-rich, consistent and relevant messaging, whether that is Wellness or other Scillonian speciality.

10.10.2 Objectives

1. Evolve the distinctiveness of the brand personality and its narrative from the excellent brand platform that exists, e.g. the great archipelago, culture & heritage, wellness, seafood, smart tourism.
2. Ensure the Isles of Scilly's unique 'sense of place' – natural, tranquil, maritime, cultural – and its brand values (see graphic to right) are reflected appropriately in all tourism products, experiences and promotional activities, and in behaviour by islanders with whom visitors come into contact.



BRAND VALUES MATTER

The Isles of Scilly is rebuilding its brand values. They can carry more confidence, attitude and quirkiness for the right markets through the spotlight opportunities (Section 6). These can reinforce the underlying 'escape destination' narrative that informs the brand and campaign communications.

3. Continually monitor the quality of tourism products and services to ensure they reflect the islands' brand values.
4. Position Scilly, within the context of the *Smart Islands* project, eventually as a world leader in good environmental practice and sustainable environmental experiences.

This could involve:

- i. Improving environmental management practices and engaging visitors in conservation through measures such as an 'educational' campaign.
 - ii. Improving tourism product and service quality.
 - iii. Applying for, and winning, a Green Destination award in due course.
 - iv. Island businesses applying for, and winning, Green Tourism awards.
 - v. Establishing a reputation for holding small environmental conferences (ideally off-peak season).
5. Improve critical skills to deliver an experience that matches the exceptional character of the natural environment.

10.11 EASY ACCESS TO INFORMATION & BOOKING

10.11.1 Aim

We want to transform the ability of regular, new and potential visitors to find out about the islands, build their breaks and itineraries and make the most of their time on the islands through all touchpoints, from personal to digital.

10.11.2 Objectives

1. Develop the digital booking enablement system and extend the opportunity to participate to Scilly tourism businesses.
2. Negotiate a deal with online travel agencies (OTAs: Expedia Booking.com etc.) on behalf of accommodation businesses to sell 'unsold inventory', especially during the off-season.
3. Ensure links to bookable Scilly products are maintained and developed from www.visitislesofscilly.com.
4. Develop improved system for planning, accessing and booking inter-island boat trips.
5. Ensure clear and customer-oriented information is available for inter-island boat services online.
6. Ensure clear and customer-oriented information is displayed at St. Mary's Quay (i.e. departure times, boat name, destination).
7. Erect tastefully designed, environmentally coherent signs to direct visitors to major island attractions and sites.

10.12 SEASON EXTENSION

This involves both personal will and commercial risk. Seat capacity and accommodation availability, as well as places open for visitors to eat and enjoy themselves, are all critical. It is unlikely that one operator – whether accommodation, restaurant or transport operator – would unilaterally consider taking such a risk. Therefore it is worth exploring, on a limited basis initially, the possibility of a cooperative pilot effort between the transport operator, some accommodation providers, and restaurants/pubs and others,



RATBAGS, ST. MARY'S

A family run firm producing hand-made colourful canvas bags, clothing and hats from their harbour workshop. From offcuts from making and repairing sails and boat covers, the sisters are now busy producing items for visitors and local businesses alike, plus running the Schooners Hotel.

<http://bit.ly/2siYUXB>

possibly around an event, to extend the season. If successful, this could be gradually extended to drive more off-season business. This should be trialled just before the start of the season and/or just after the end. Clement weather makes this more viable and therefore encourages participation by island businesses. This should be given time to bear fruit – ideally over 3 years – monitored for insights and growth.

10.12.1 Aim

Create a 'seasonal extension' task-and-finish group with the specific aim of finding ways to extend the season through pilot programmes.

10.12.2 Objectives

1. Build a 'coalition of the willing' – operators who can provide the essentials for an off-season short break (e.g. transport providers, selected accommodation operators, food outlets, attractions and activity operators), who would take a joint risk to remain open, add services.
2. Create an event/series of events, to provide a reason to visit outside the main season.
3. Create a package, which could be sold online and via tour operators/travel agents, so that it would be appealing and easy to book, e.g. walking, music, dark skies, wellbeing, cultural heritage, food & drink, sports etc.
4. Develop an off-season package campaign to promote – social media, hosting media & bloggers, trade familiarisation tours.
5. Assess potential of selected reverse weekend sailings and Sunday flights for short breaks.

10.13 INTEGRATED PLANNING

10.13.1 Aim

To build on the networks and fora already in place to develop social and economic master plans that fully integrate tourism.

10.13.2 Objectives

1. Ensure 'joined up' planning between sectors. Develop a formal process for stakeholders to inform planning policy, and especially the Local Plan. Create ongoing opportunities for further dialogue between tourism operators and the Council of the Isles of Scilly, in order to ensure tourism issues are understood in good time.
2. Ensure effective visitor management, to maintain the islands' appeal and minimise degradation of the natural and built environment. This includes considering the size and number of cruise ships per day/week and the number of passengers permitted on land.
3. Ensure a balanced character to the island's built infrastructure and a healthy commercial mix, especially between retail and self-catering accommodation in Hugh Town.
4. Consider measures, such as a visitor giving scheme, to provide greater resilience and sustainability in maintaining assets and services that are impacted by visitors (e.g. heritage assets, natural environment, utilities).
5. Explore opportunities, within heritage planning constraints, to erect a means of sheltering ship passengers at Penzance Quay and providing a more welcoming departure point.



ART & DESIGN INTERVENTIONS

Along with many of the English south coast resorts, Eastbourne is turning to artists and designers to reimagine their seascapes and boost visitor numbers.

Spy Glass beach hut by JaK Studio. Commissioned by Eastbourne Borough Council as part of an international design competition. (<http://bit.ly/2nbvpRP>)

Bournemouth has just launched new Hemingway Design beach huts.

Image: Richard Pearce's Golden Eagle Studio, Bryher

10.14 BUSINESS EFFICIENCY

10.14.1 Aim

To review business processes and seek ways to improve business efficiency, increase profitability and reduce costs. Measures will vary from business to business and will depend on market trends, the size of the business, the level of its development, and its future aspirations. This seeks to deliver the ambition articulated by the Cornwall and Isles of Scilly Local Enterprise Partnership to continue *“to develop its reputation as a destination of choice for tourism, food and drink and for its creative and cultural communities and heritage”*.

10.14.2 Objectives

1. Improve efficiency:
 - i. Review business needs and re-prioritise focus of effort in light of findings;
 - ii. Review stock control systems, with financial management systems and purchasing policy;
 - iii. Review work processes and identify potential areas for automation or where the use of technology might improve the process (e.g. operational systems, information provision, online booking).
2. Reduce costs and wastage:
 - i. Review and identify partnership opportunities (e.g. with Visit Cornwall et al);
 - ii. Review/introduce environmental management policy, including minimising waste, increasing recycling;
 - iii. Identify areas where effort or cost might be shared with other businesses (e.g. purchasing, staff, freight import, training programmes, promotion).
3. Increase profitability:
 - i. Review revenue strategy to focus on maximising return on investment;
 - ii. Identify areas where effort or cost might be shared with other businesses (e.g. freight import, purchasing, staff, training programmes, promotion et al).

“The world of renewable energy will be transformed by developments with wave technology, geothermal and the application of new smart technologies. Cornwall and Isles of Scilly continues to develop its reputation as a destination of choice for tourism, food and drink and for its creative and cultural communities and heritage.”

**MARK DUDDRIDGE, CHAIR OF
CORNWALL & ISLES OF SCILLY LEP**

Businesses should collaborate to identify areas of potential synergy. Once these have been identified, an approach might be made to potential funding sources for assistance in addressing local business productivity improvement needs within a regional strategic context.

www.cioslep.com/employment-and-skills/overview

NEXT STEPS

11. Towards the Action Plan

11.1 RATIONALE FOR ACTION

11.1.1 Timeliness

Achieving the ambitions of this document and overcoming the threat to the sustainability of the islands' communities provides an aspirational goal to drive new levels of collaboration, creating a future for the islands and make every islander proud to call them home. The drive to create a more productive and competitive industry has provided the economic foundations and informed the strategic thinking behind this DMP. The issues have been identified, the challenges understood and the objectives are clear. It is now time for action.

11.1.2 Mechanisms to progress

The delivery outputs of the subsequent Action Plan must be in-step with the stated ambition of incremental growth. The Action Plan will identify roles and responsibilities and set out clear and quantifiable deliverables.

Clearly, this is likely to necessitate new mechanisms for delivery – one of which will be the **task-finish group**. This has a number of benefits:

- _ It reduces reliance on a core of tourism leaders;
- _ It is solution and delivery focused;

- _ The groups are composed of the appropriate people for each task, but can connect across groups as required;
- _ They have a clear line of reporting and oversight to the Islands' Partnership.

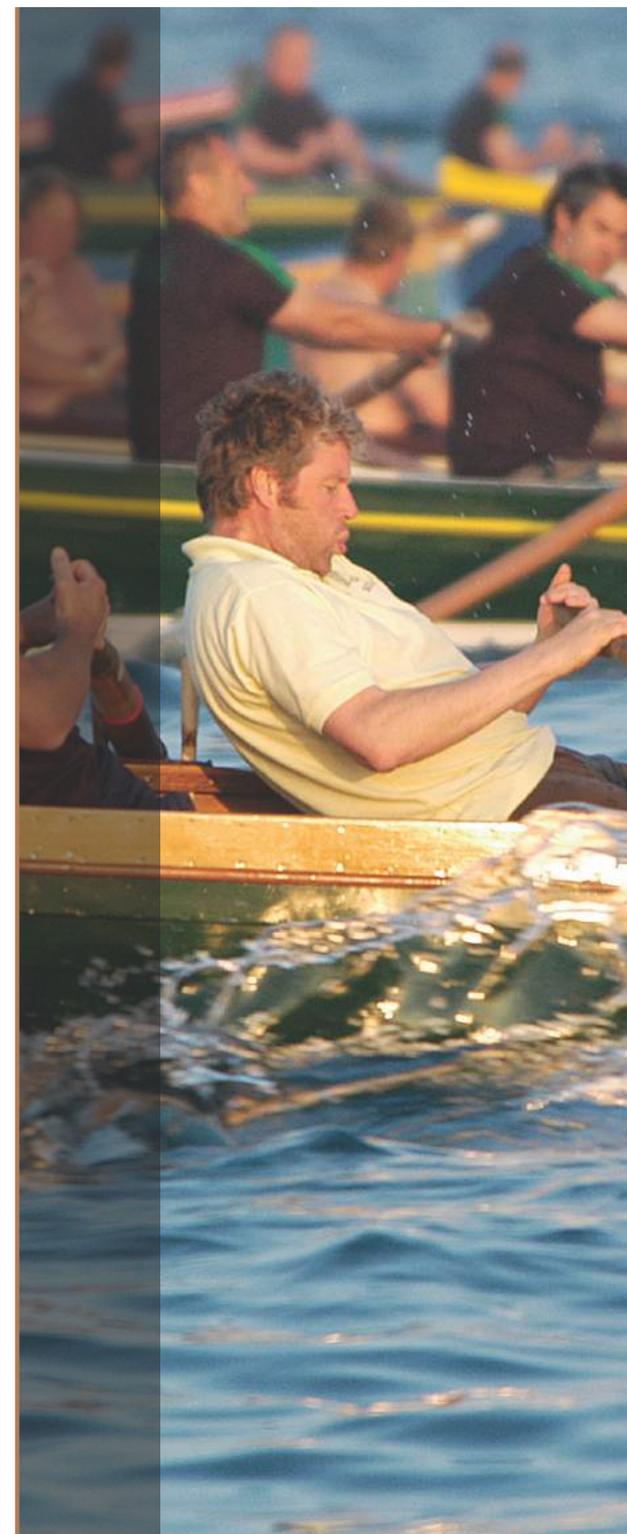
These models of delivery will draw on talents, insights and energy from across the islands and the mainland. The Action Plan empowers task-finish groups to work in partnership with the key agencies to ensure that the sum of the the parts of the visitor offer is not compromised by the elements we can easily take for granted.

11.1.3 A collective, ongoing call to action

This will be manifested through the detailed Action Plan which will be reviewed annually. We need your active support – collectivism is key. The Islands' Partnership represents your interests, and through this Plan our shared goals can be achieved. Signal your support and commitment to our amazing visitor economy by helping to realise this Plan.

Together, we want to see our shared vision and ambitions become a reality for everyone living, working and visiting the Isles of Scilly.

The Action Plan will accompany the DMP as a supporting document.



12. The grand prize: a blog from a future we can make

Scilly Business Week, 2028. The Islands' business community gathers for its annual pre-season 'conference' to share new information, showcase new products and services and pass on new skills in workshops, surgeries and seminars. The week is the biggest it has been – with an equal number of sessions led by the Islands' own business community alongside invited guest speakers from the mainland and beyond. Indeed two whole days are now dedicated to international partnership working. Sessions with partners from Iceland, The Faroe Islands¹, Orkneys, Ireland and others explore shared issues, exchange good practice and identify collaborative projects. A special relationship with the Faroe Islands has been cultivated – a discovery of shared cultural peculiarities like Pilot Gig racing and inter-island football have inspired a 5-year cross-cultural exchange of musicians, craftspeople, writers and artists. This exchange is the basis for the social and cultural programme attached to this year's Business Week across hotel bars, pubs and community centres in St Mary's, Tresco and St Martin's. Later in the year, Scilly's own *Rough Island Band* will take Scilly to the Faroes, playing unusual gigs to audiences from boats sailing in and around that coast, finishing up at *Gfestival*.

10 years into its journey, the Scilly businesses community is **smart**. The drive to design a sustainable economy and low carbon future is well progressed. Following the introduction of bold and progressive property tax incentives and penalties, more of the Islands' property assets have been put to work on behalf of the Islands' economy – as residential dwellings for local families and/or meeting the growing demand for holiday accommodation. The purchase of

second homes is on the decline, and many more second-homers have committed to making their properties available to visitors during the season. More Scillonians than ever are economically active and contributing to the GDP of the Islands. Scilly Business Week is bigger than ever. An upsurge in new SMEs reveals a trend in younger entrepreneurs developing new service-led, lifestyle businesses. This is a response to the green-shoots of changes in visitor profile – noticeably younger, active, seeking out engaging experiences that connect with the extraordinary heritage landscape and its special marine/maritime environment.

These businesses and their visiting customers share an eco-ethic which is becoming synonymous with Scilly business and tourism culture. Whilst mindful of protecting the heritage landscape, small agri-businesses are making effective use of redundant, flower fields for crops that help support a growing Scilly food and drink marque. A cleverly communicated distinction between locally sourced and imported goods has seen a swell in support for goods of local provenance with positive business impact. Island markets are prioritised ahead of export – except in the flower industry of course.

1 Visit Faroe Islands is restructuring tourism at ministerial level to Destination Manage rather than Destination Market. They understand the need to take the foot off the 'marketing gas' and pull the product development levers. There is a strong cultural offer (e.g. music, craft/making) and a greater diversity than Scilly but the cultural infrastructure is under invested, fragmented and weak.



TIMELESS PLEASURES

"To my mind there are few pleasures to beat eating fresh food with a glass of wine in the sun with a view of the sea – Scilly was made for this."

Gavin McOwan, Production Editor,
Guardian Travel

The concept of shaping a sustainable C21st community on an archipelago is attracting the interests of new tourism markets. The islanders have shaped an offer for guests wanting to play an aware, active and engaged part in the drive for sustainable living and responsible tourism – supporting the preservation of natural assets and cultural inheritance whilst they do. Activities and experiences connect with visitors’ pursuit of self-actualisation with activities focused on health and wellbeing, self-improvement, maritime sports and activities – walking, running, open-water swimming, diving.

Many holidays have an additional purpose. ScillyDiving programmes continue to promote eco-responsibility, and Google Arts & Culture has been a partner in creating a series of new packages where the divers contribute to a long-term initiative mapping and photographing the seabed. Google SeaView, a Scillonian counterpart to Street View – will launch fully on Google Arts & Culture at Easter – a series of stunning photographs and footage revealing what’s under the water – wrecks, marine life, underwater landscapes and geology.

The timing is designed to coincide with the launch of the 2028-29 exhibition programme at The Islands of Scilly Museum. Reopened in 2025 – this museum is the newly crowned winner of the RIBA Stirling Prize. Sensitivity to the environment (design, building method and also operational functionality) were the key requirements in this new build brief. The winning architectural concept has resulted in an elegant building in the centre of Hugh Town, replacing the old museum. Alongside a secure museum

facility is an additional space that can be used for community, cultural and commercial purposes – education, events, performances. The museum itself has retained much of the charm of the cabinet of curiosity style displays, with interpretation exploring all aspects of Scillonian heritage (maritime, natural history, ancient history, social history and industry, art and culture for example) but more streamlined, with space for exhibitions and a secure and climatically controlled environment for the safe display of star items – the Colossus Carvings and Bryher Sword – now shown off to best-advantage. The collection has been fully documented, including aural histories, which has created resources for use across the islands. One of the unique features of this museum is how it extends physically and digitally beyond St Mary’s, with individually designed interpretation pods also on Treeco, St Martin’s, St Agnes and Bryher – even popping up at the airport and heliports.

The museum has already impressed the cruise operators, adding new bookable product to the ever-popular Treeco excursions. Its design means it is capable of absorbing the sudden influx of visitors to the town – and it houses a series of ‘pop-up shops’ for walking tour-guides, drivers, boatmen, artists, makers and food producers to greet visitors. For 2028, the museum is using the bicentenary of the first photographs of John Gibson as a platform. A showcase exhibition of the Gibson archive has also been the inspiration for a series of photography courses with professionals. It is already selling well across the shoulder season, with a number of grant-funded artist-commissions also taking place.



FAROE ISLANDS: GOOGLE & SHEEP VIEW

Durita Andreassen and her Sheep View 360 project continues to take social media by storm, whilst staying true to the cultural heritage. Remoteness and quirkiness have become virtues.

Image:
visitfaroeislands.com/sheepview360

Steve Messam's 'art in the landscape' trilogy launches the series. Already installed, they will biodegrade across the year, and are the subject of an arts media familiarisation trip just after the Business Week. The new museum piloted site-specific artist-led interventions to generate a pool of creative ideas and to test environmental and operational issues. This has provided a new level of artistic direction which, growing in ambition and uniqueness, is seeing more visitors directly motivated to visit to experience culture.

For the majority of visitors, the cultural activities are a holistic part of the Scilly experience and have been brought into sharper focus across all of the islands. A single events calendar platform has made it easy for tourism service providers to receive and share information: hotel receptionists receive what's on e-briefings; boatmen carry live what's on listings on their websites and booking apps. Across the summer season there is a regular programme: cinema under the stars, a weekly meet-the-maker night, pub gigs, and outdoor performances. All sporting events – from the World Championship Pilot Gig Race to the Scilly Swim Challenge have their own social-cultural programme. And each week visitors join locals to watch training and enjoy a band and a BBQ on the beach. Outside the main season the focus is on the themed weeks and short breaks with culture & heritage animating them all rather than a single annual focus – Low Tide Festival, film, music, walking, food and drink, dark skies. Wellbeing weeks in September and October.

For visitors the ease of getting to and also around Scilly is improved. The South West Pullman offers a Destination Scilly

family ticket package from Paddington (and other key stations en route) with meals, portage links to onward travel or selected overnight accommodation. Regular Southampton flights now serve and Bristol launches next year. Route planners with live availability checking is standard on the Visit Scilly website and contactless payment is available for all services on the islands – even on the boats, who have streamlined their public information & pricing – letting technology do the work behind the scenes to apportion payments to boatmen and their associations.

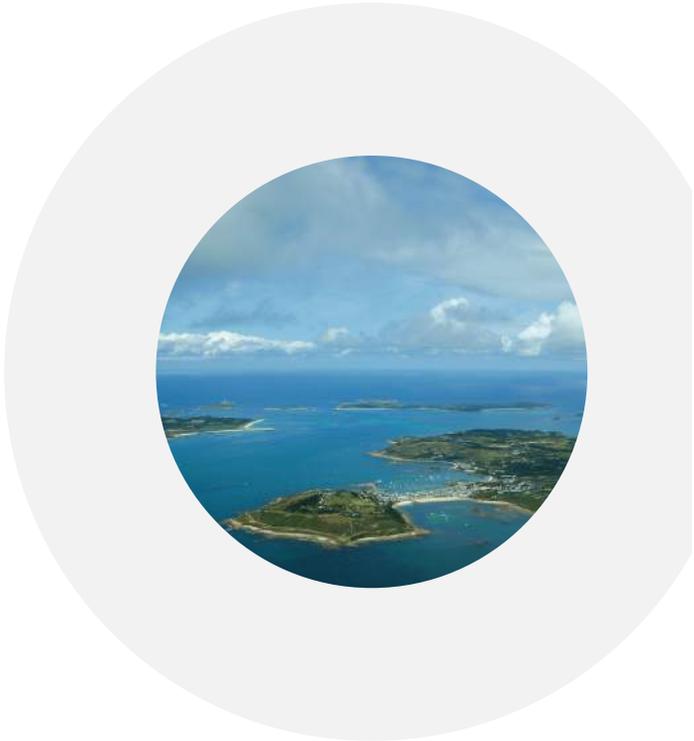
Scilly has harnessed *Smart Island* thinking to create a tourism destination that works equally for visitors as well as islanders and residents. The offer, and with it the market, has become more diverse – younger, more active. The core offer remains – peace and tranquillity, the heritage landscape and special character. Whether attracted for art, self-improvement, music, heritage, adventure, fresh air, retreat, serious pampering & luxury, family downtime, or sightseeing... it's easy to find your own place and pace. Each of the markets share one thing in common – a delight for Scilly and a commitment to conserving their corner of it for future generations. The Scilly Pledge is shared before the visitors even arrive – on booking travel, accommodation, on the website and at mainland departure gateways. There, visitors are encouraged to leave their disposable drinks bottles and replace them with reusable Scilly Way bottles which can be used for free at designated filter stations all around the islands. And they do.

March 2028.



SILVERSMITHERY, ST MARTIN'S

Arts, culture, crafts and design are underplayed in the offer at the moment. That can change.



Commissioned by  islands partnership

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