

A man and a young child are on a boat, both wearing blue hats and life jackets. They are reaching out towards a rope and a large orange and blue buoy. The background shows a bright blue sky and a body of water with a rocky coastline in the distance.

islands  
partnership

# Annual Report 2017/18

*Securing the future of the  
islands' visitor economy*

# Foreword

*We have a clear strategy - now is the time for action*



**ÖTILLÖ event**  
Leading the charge for a dynamic future



**James Berresford,**  
Chairman of the  
*Islands' Partnership.*

As we approach the Islands' Partnership's sixth Annual General Meeting in October - and my third as Chairman - it's with a huge sense of pride that I look back on the achievements of this organisation, not least over what has been another busy year.

Once again, our small executive team has delivered a work programme of a scale and level of professionalism that one might expect from an organisation twice its size. This continues to be manifest in our marketing activity and typified by our superb *visitesofscilly* website and annual brochure - both of which, most importantly, continue to work so effectively for both our visitors and our members.

But, for me, it's our work in developing the islands' first Destination Management Plan (DMP) that is the stand-out achievement of

the last 12 months. Our members will recall, we began to lay the foundations for the DMP nearly two years ago - and took your steer at our AGM in 2016 on the direction we should pursue. The decision you guided us on, to seek incremental growth and not simply 'steady as she goes', was, and still is, absolutely the right approach. The subsequent journey and process to secure the required funding and backing of major stakeholders has been hard fought, but, thanks to our partners and, in particular, the financial support of the Cornwall & Isles of Scilly LEP, I feel we now have a DMP that is amongst the best in the country. I certainly know of few others that have taken such an honest and intelligent approach to their future planning.

I don't think it's any exaggeration to say that Scilly is probably the most tourism-dependent destination of anywhere in the UK. That's why the DMP - and our members support for it - really matters. It matters because the long term future and sustainability of the islands' vital tourism industry depends

to a large extent on decisions we make now. Extending our season, improving transport and accessibility and investing in the quality of our product and service are but three of the strategic priorities set out in the DMP where action, can - and must - begin now.

Naturally, the Islands' Partnership will take a leading role in a number of key areas. We have already begun to make good progress on reviewing and refreshing the islands' brand, on enhancing our distinctive cultural offer through our exciting Creative Islands project and in making it easier for our visitors to plan and book their visit via our booking enablement project. However, if the ambitions set out in the DMP are to be fully realised, it will require everyone to play their part. That's why we're in the process of preparing an accompanying Action Plan to the DMP. This plan will provide a rolling annual work programme that all stakeholders, both large and small, can identify with and understand how and where they can engage and contribute to its delivery. We're currently

consulting on this Action Plan and look forward to sharing this with you at our AGM in October.

As I approach the end of my third year in post, I can confirm that this October's AGM will be my last as Chairman of the Islands' Partnership. It has been my great privilege to act as your Chairman but there always comes a time to move on. With the ongoing support of its strategic partners and you, our members, the Islands' Partnership has as strong a basis as ever on which to continue to drive the sector forward. When combined with the DMP, an emerging Action Plan and with new investment on the horizon, I am confident that the islands' tourism industry will continue to flourish and grow in the future.

As always, I look forward to the opportunity to see many of you again at the AGM in October.

— “ —  
**Extending our season, improving transport and accessibility and investing in the quality of our product & service**  
— ” —

# Delivering for the islands

## Looking back on 2017/18



David Jackson,  
Executive Director  
of the Islands'  
Partnership.

**A**s I write this report, Scilly - and the UK as a whole - is basking in one of the warmest and driest summers on record. Water shortages aside, if the weather continues to hold, I hope that we'll all be able to look back at the end of the season and regard it as a vintage year for the islands. Here at the Islands' Partnership, we'd like to think that we've helped to play our part in this. Our work and collective efforts over the past year, from the press and media coverage or the continuing performance of our [visitislesofscilly.com](http://visitislesofscilly.com) website to our significant events programme, are all designed to do one thing - drive market growth for the benefit of our members and the islands' economy as a whole.

Looking back on the 2017/18 year, there have been some genuine stand-out moments. Our growing influence and success in running major events has seen us bring the Red Arrows back to Scilly for a second time, as well as the spectacular ÖTILLÖ World Swimrun Series. We're proud to have brought ÖTILLÖ to Scilly - and it's the IP that continues to ensure they come back, providing the lion's share of sponsorship and event support to make this happen. Walk Scilly and the Taste

of Scilly Festival continue to grow in size and profile every year - whilst our support for Art Scilly, the Folk Festival and the WPGC is testament to their importance in Scilly's events calendar.

There has also been a growing momentum in new investment across the islands. Longstone Lodge, Peninnis Farm, Island Fish, On the Quay, The Beach - the list could go on of the major investments in the islands' product. We should also recognise the Scilly businesses that have continued to lead the way in quality and excellence, winning several awards this year along the way; Tanglewood Kitchen, Westward Farm, Island Fish and, once again, the superb Hell Bay Hotel.

This appetite to invest and continue to improve the quality of the visitor experience on Scilly is fantastic to see. Through the islands' new Destination Management Plan, we'll continue to support businesses to follow this path and champion new and sustained investment.

We hope that this momentum is being felt by you - our members and the islands' business community. You have certainly continued to show your support, with membership at an all time high. We are a small team and work hard to make a difference and provide genuine added value for each and every member. It's perhaps worth emphasising that for every £1 our members contribute, this is multiplied by at least 8 times - every penny of which is spent on supporting our members and the islands' tourism industry to grow. It's this collective, shared approach that continues to be at the very heart of the Islands' Partnership.

Rest assured, we will continue to do all we can to work on your behalf and to repay this trust and backing that our members continue to invest in us.

### EVENTS

- The IP's financial support and leadership has been instrumental in continuing to bring the ÖTILLÖ World Swimrun Series to Scilly
- Red Arrows returned for the second year running in August 2017
- Record visitor numbers and spend for Walk Scilly and the Taste of Scilly Festival



### MARKETING

- 30,000 2018 brochures distributed nationwide - and used by 58% of first time visitors
- Successful marketing campaigns, helping to drive new visitors, including via Youtube, Google and Facebook
- Continued investment in professional, on-brand photography and video content
- Attendance and representation at major overseas and travel trade exhibitions



58%  
FIRST TIME  
VISITORS

### DIGITAL

- [Visitislesofscilly.com](http://visitislesofscilly.com) continues to be the go-to portal for all visitors with over 500,000 unique visits each year, which generates thousands of booking enquiries for our members
- Our social media following has risen to over 32,000, with significant new growth and engagement via Instagram
- Our email database remains a valuable and effective marketing asset with over 75,000 active subscribers



### PROJECTS & NEW INVESTMENT

- Cultural Destinations has gathered momentum with an exciting programme set to deliver over the next two years
- Having secured funding through the Voucher Scheme programme, our new Booking Enablement Project was launched in March. With the majority of visitors expecting to check availability and book online, this project will help our industry respond to this
- We're also proud of the Taste of Scilly local produce Marque and Charter, launched last year.

### VISITOR SERVICES

- The TIC has welcomed over 50,000 visitors and answered more than 5,000 calls and emails. It continues to play a vital role that is highly valued by visitors and members
- Our partnership with the Isles of Scilly Wildlife Trust continues to provide huge added value and a cohesive and coordinated message to visitors around enjoying our precious natural environment
- Our visiting cruise ships provide an important economic boost to the islands. This year over 12,000 passengers have been welcomed to St. Mary's alone, with our incredible team of volunteer welcome ambassadors meeting and greeting almost every one.

### PUBLIC RELATIONS AND MEDIA

- Our investment in PR continues to pay dividends, with further money-can't-buy media coverage secured over the last year
- Highlights include major features in the Guardian, Olive and National Geographic, plus TV coverage from the likes of ITV and Channel 5 and an increasing volume of social media influencers, bloggers and vloggers



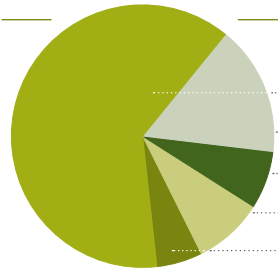
### STRATEGIC LEADERSHIP & INFLUENCE

- Having secured funding from the Cornwall & IOS LEP, the IP launched the DMP in March this year and is leading the process of producing an Action Plan that will guide the future direction of the islands' tourism industry.
- The IP continues to champion the islands' tourism industry, providing leadership and representation at local, regional and national levels
- We continue to invest in research, providing valuable insight and market intelligence

### INDUSTRY SUPPORT

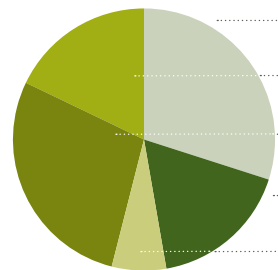
- Scilly Business Week - This year's event was our biggest and most successful yet.
- Supply Scilly - Similarly, February's Supply Scilly was another sell-out, with overwhelmingly positive feedback from both suppliers and local businesses alike
- One thing we have always maintained is an open-door policy for our members to come in and seek advice from our team. Quality schemes, IT queries, regulatory issues...

# 2017/18 in numbers



## Membership 2017/18

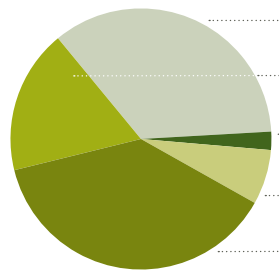
- 211 Accommodation
- 54 Food, Drink & Retail
- 24 Attractions, Activities & Tours
- 29 Transport, Trade & Other
- 19 Mainland Affiliate/Supplier



## Income 2017/18

- £134,000 Core Sponsors
- £80,000 TIC
- £126,000 Marketing & Events
- £77,500 Membership
- £30,000 LEP (DMP)

(Excludes Cultural Destinations and Voucher Scheme projects which began in Q4)



## Expenditure 2017/18

- £155,000 Central Costs
- £79,000 TIC
- £10,000 Membership
- £30,000 DMP
- £168,000 Marketing & Events

(Excludes Cultural Destinations and Voucher Scheme projects which began in Q4)



**40% OF FIRST TIME VISITORS** are coming on a short break - a growing trend



The ability to book online is the preferred booking method by the majority of visitors



**75% OF FIRST TIME VISITORS** use visitislesofscilly.com to plan their trip



**26% OF VISITORS** in 2017 were coming for the first time

Our core sponsors



Working in partnership with



# Looking ahead

With the Destination Management Plan in place and the supporting Action Plan set for launch at our AGM in October, the strategic priorities and objectives set out in the DMP now provide the IP's own route map and work programme. The DMP is an islands-wide plan and will rely on a shared, collective approach.

## In 2018/19 we will

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

**Undertake** a review and refresh of the Isles of Scilly brand ensuring it remains fresh and begins to embrace the spotlight themes identified in the DMP and the potential to position itself as England's Great Archipelago and the escape destination.

**Deliver** the innovative 'booking enablement' project, including the integration of a polling engine into visitislesofscilly.com and parallel support to enable accommodation businesses to adopt online booking capability and increased onward distribution.

**Lead** the delivery of Scilly's Cultural Destinations project (Creative Islands) leading a consortium of local cultural partners, enabling the potential of the islands' cultural offer to be fully realised including new visitor experiences that provide an additional driver of demand.

**Explore** opportunities to develop and deliver a new local assessment scheme for Scilly - the 'Scilly Standard' - potentially aligned to the national approach yet specific to Scilly, recognising local identity, character, culture and service.

**Ensure** that the TIC and related IP led visitor services continue to provide a professional and effective marketing and communications platform for members and advertisers and a valuable service for visitors.

**Continue** to provide strategic input to the islands' transport agenda, positively influencing improvements to Scilly's transport systems by working closely with strategic partners, transport operators and infrastructure owners.

**Continue** to work in close partnership with the Smart Islands Partnership and the Isles of Scilly Wildlife Trust to encourage businesses and visitors to adopt sustainable, low carbon practices and employ responsible behaviour that will help to protect and preserve the unique environment on which we depend.

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

— “ —  
Ensuring we have a cohesive and attractive offer for visitors in Spring and Autumn  
— ” —

## IP BOARD OF DIRECTORS



**James Berresford (Chairman)**



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



**Jon May**  
Peninnis Farm and Lodges,  
Farm Deli, Sandpiper Shop  
and apartments



**Euan Rodger**  
Tanglewood Kitchen



**John Peacock**  
St. Agnes Boating



**Sabine  
Schraudolph**  
Strudel Up Country  
& Strudel In Town



**Luke Humphries**  
Duchy of Cornwall



**Philip Callan**  
Hell Bay Hotel  
and Tresco Estate



**Mark Howarth**  
Isles of Scilly Steamship Company  
(Oct '17 to Jul '18)

## YOUR PARTNERSHIP TEAM



**from left to right**  
David Jackson, Sam Ellis, Rachel Greenlaw, Maggie Wagstaff, Sue Sherris, Annie Lethbridge,  
Martin Goodey, Carolyn Garman, Jeremy Brown, Tammy Bedford (not pictured)



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