

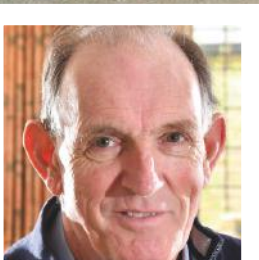


islands
partnership



2022/23 ANNUAL REPORT &
**Membership
Prospectus**
2023/24

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



Foreword

Andrew Sells, Chairman,
Islands' Partnership

On behalf of the Board of the Islands' Partnership it gives me immense pleasure to present you with this summary Annual Report for 2022/23 and, looking ahead, our Membership Prospectus for 2023/24.

As I look back on the 2022/23 financial year from the summer of 2023 it is with confidence that we – IP, its stakeholders, partners, and our members, have come through the tough times of the COVID pandemic but continue to face challenging circumstances given the current economic climate.

As international travel provides greater competition than ever before and people feel the economic pinch in their pockets, our objectives will require an even greater sense of collaboration and partnership, if we are going to ensure we achieve them.

Our common interests and our priorities for maintaining market share and sustainable growth – individually as businesses, and across the visitor economy remain.

Despite the continued challenges the 2023 season so far has remained busy but possibly not quite to the same highs of the immediate post-pandemic demand. We are under no illusion that businesses are having to work increasingly hard to fill gaps in the shoulder periods. Consumer concern is evident with reported lower on-island spend too.

Combinations of factors play their part in these struggles. One thing we know though is we still have a loyal visitor base who crave the solace Scilly provides and a new market out there of people seeking new adventures and experiences.

During these complex times, we enjoyed our excellent working relationships with our strategic partners, the Isles of Scilly Steamship Company, Tresco Estate, the Duchy of Cornwall and Penzance Helicopters. I'm delighted to say all four partners have reaffirmed their commitment to IP with a new three-year strategic partnership agreement, based on our shared vision to grow the islands' visitor economy. The Board and I are most grateful to them for their continued support and confidence in us.

This has been a year of transition within the Executive team. After three and half years in the role, we said goodbye to Nick Bond at Christmas. The Board and I would like to put on record our thanks to Nick who helped steer the IP and local visitor economy, during the most challenging of times – the COVID pandemic.

I'm pleased to say Euan Rodger has taken on the role of Executive Vice-Chair leading the team which has also welcomed Anna Mahoney as our new Events- Co-ordinator and welcomed back Sue Sherris as our Operations Assistant.

Since starting his executive position Euan has carried on the groundwork laid by his predecessors which includes some exciting opportunities.

I'm pleased to announce we are collaborating with our friends at Visit Cornwall to form one of only 25 national Local Visitor Economy Partnerships (LVEP). This joint venture opens up some positive collaborative opportunities whilst ensuring we retain our organisational autonomy and marketing assets.

Earlier this summer the Council of the Isles of Scilly approved funding for a feasibility study to be carried out to explore the possibility of the Isles of Scilly forming its own Business Improvement District (BID). The IP are working closely with the Council of the Isles of Scilly and other partners on this project. We look forward to presenting this opportunity to you and the wider public over the coming months.

Ongoing projects such as the islands' vessel replacement programme are of the utmost importance and a matter we continue to work with key stakeholders on. Reasonable passenger fares, freight charges and improved service are essential for the visitor economy to thrive. We have also committed further resource this year to the new museum and cultural centre for Scilly and fully realise its importance to visitors and the community.

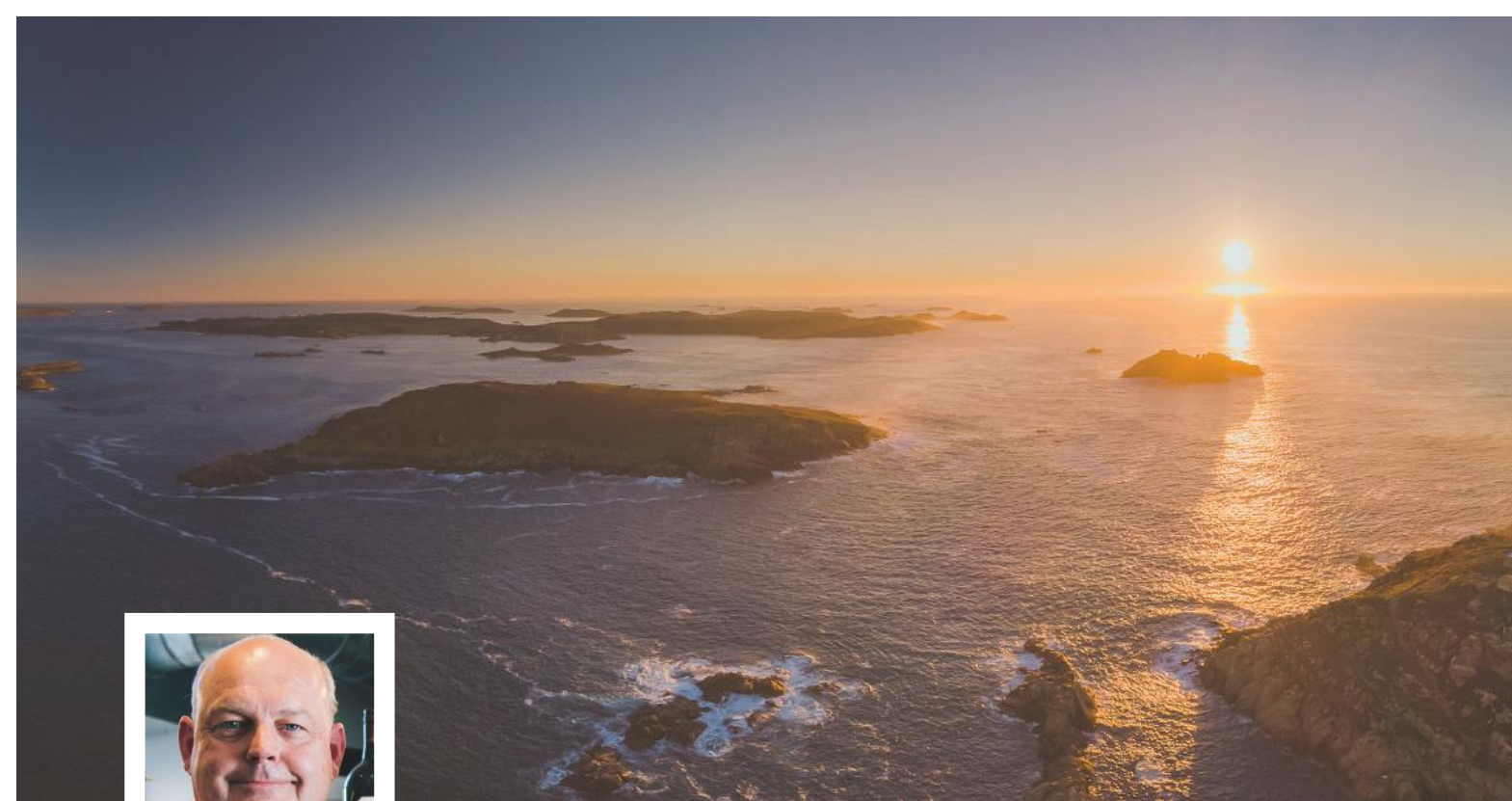
Increasing our Executive team has allowed us to get on with business we haven't been able to conduct since the beginning of the pandemic. Our events programme has grown and will grow further in 2024. Given the early start to the season due to Easter falling in late March/early April, Walk Scilly will start a little earlier to follow straight on and Creative Scilly will have a refresh under our management in mid-May. New events such as Ocean Scilly in August which features a new Swim Run event will help bolster the late August period too.

Through our events programme, we continue to look to fill gaps in the market, promote the very best experiences Scilly has to offer and provide a more diverse audience a reason to visit the islands and return in the years to come. The IP has also taken a greater role in existing events – notably the World Pilot Gig Championships.

There has also been some change to the Board of IP over the last year. The Board and I would like to thank Jon May for his longstanding contribution. At the last AGM, we had the pleasure of welcoming the Chief Executive of the Isles of Scilly Wildlife Trust, Julian Branscombe to the Board. Julian gives us a wealth of experience given his background in nature conversation.

As I stated in earlier remarks, we recognise that challenging circumstances remain but there clearly are exciting opportunities on the horizon for growth and to ensure Scilly remains a leading destination for years to come.

Finally, I would like to thank all our staff, whether full-time or part-time, for their dedication and hard work. The Board and I are most grateful for your continued support. Here's to a busy end to 2023 and a prosperous 2024. I look forward to seeing you at the forthcoming AGM in October.



Euan Rodger, Executive Vice Chair, Islands' Partnership

Welcome to our annual report and prospectus for 2023/24. Your support over the last 12 months has been much appreciated and I look forward to it continuing into 2024 and beyond.

We have moved back to a more typical pre-pandemic season. Despite the challenges further afield and closer to home, the islands have enjoyed a good season overall, but challenges and uncertainty remain. I have no doubt a collective voice in partnership will bring prosperity to all moving forward.

Over the last 12 months, the IP has managed its dedicated Marketing & PR activity with great success both in terms of column inches and digital traffic; two key performance indicators. Integral to the IP's delivery output has been our events calendar which has delivered some wonderful programmes and will continue to grow into 2024 to help extend the shoulder periods of the season and increase the offering for regular and new visitors to Scilly throughout the season.

Further strategic initiatives will continue to move forward in 2024 for the benefit of businesses on Scilly, our visitors, and the wider community and include the Cornwall and Isles of Scilly Local Visitor Economy Partnership (LVEP) and the feasibility study into the islands forming a Business Improvement District. We will of course continue to ensure that our website receives investment and our undivided attention and that the eviivo booking system reacts as best it can to members needs.

I would like to take this opportunity to thank the IP Executive and award-winning TIC team. They are all a dedicated and hardworking bunch that have the prosperity of these islands in their hearts and who regularly go above and beyond for us all. A special thanks to our volunteer Cruise Ship Ambassadors who have been kept very busy this past season.

Again, thank you for your continued support. I look forward to working in partnership with you all in 2024 and beyond. Please do not hesitate to get in touch if I can be of any assistance.

2022/23 IN NUMBERS

Our strategic priorities are unchanged from last year, they are in fact even more relevant in the circumstances:

Market growth and season extension

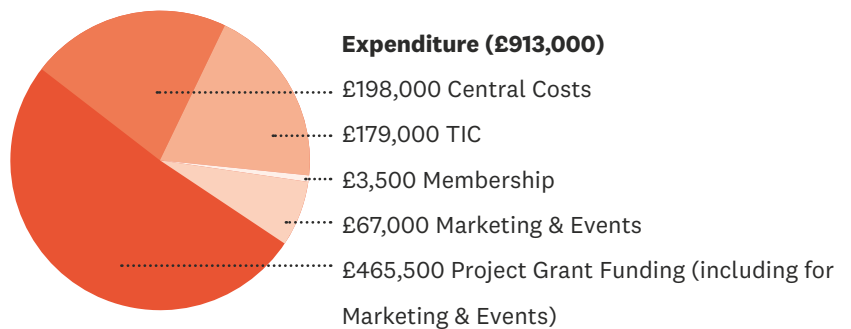
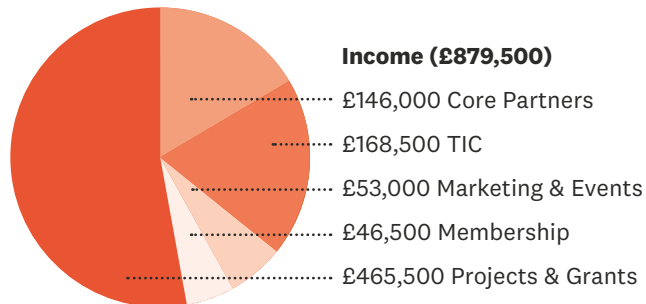
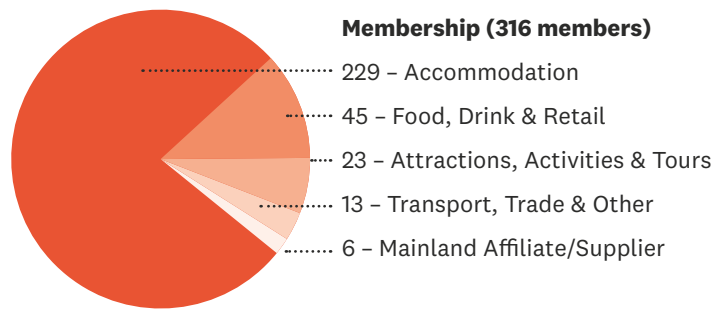
Delivering effective destination marketing to inspire more visits throughout the year, increase spend and encourage visitors to recommend and return.

A world class visitor destination - fit for the future

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

Leading from the front and delivering in partnership

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



ISLAND PARTNERSHIP EXECUTIVE TEAM



Euan Rodger
Executive Vice Chair



Amanda Bond
Head of Marketing



Victoria Bond
PR Manager



Will Lethbridge
Business Support
Co-ordinator



Sue Sherris
Operations Assistant



Maggie Wagstaff
TIC Manager



Anna Mahoney
Event's Co-Ordinator

IP BOARD OF DIRECTORS



Andrew Sells
Chairman



Euan Rodger
Tanglewood Kitchen



Zoe Julian
Scilly Flowers &
Churchtown Farm
Cottage & Apartment



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



Nick Halliday
Tresco Estate



Sharon Sandercock
Isles of Scilly
Steamship Group



David Page
Penzance Helicopters



Natalie Geen
Duchy of Cornwall



James Francis
Star Castle Hotel
& Mermaid Inn



John Peacock
St Agnes Boating



Julian Branscombe
Isles of Scilly
Wildlife Trust

OUR STRATEGIC PARTNERS



WORKING IN PARTNERSHIP WITH



2022/2023 Highlights

DIGITAL MARKETING



- Visitislesofscilly.com is the go-to portal for visitors – with over 500K users and 2.2M page views - generating thousands of booking enquiries for members. Average time spent on the website is nearly 4 minutes – almost 3 times the industry average. 83% of visitors return to the website - 10% higher than in previous years.
- Facebook referrals to our website are up 123% year over year for existing users, but for new users, up by 158%.
- Referrals from our Linktree account to the website is up 325%.
- Our email database remains a valuable and effective marketing asset - with 100K active subscribers. Average open-rates are exceeding expectations with open-rates up 17% on the previous year, in most cases exceeding 35%.

- The new style gig guide which is produced by IP on behalf of the WPGC increased takings for the committee by 100%.
- Our printed collateral sits on a site called issuu.com which allows us to publish to other places. In the last financial year, our print has received 750K impressions, 195K reads, and nearly 6,500 downloads.



STRATEGIC LEADERSHIP AND INFLUENCE

- The Destination Management Plan continues to define the strategic context for our work with strategic partners toward the sustainable future of the Islands' visitor economy.
- The IP continues to champion the islands' tourism industry, providing leadership and representation at local, regional, and national levels.
- We have joined up with our friends at Visit Cornwall to form one of the new VisitEngland administered Local Visitor Economy Partnerships (LVEP). We will work in collaboration with Visit Cornwall on projects

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

- The IP has secured funding through the local authority for a feasibility study into an Isles of Scilly Business Improvement District (BID). The study is underway to find out if there is a suitable model where all businesses that benefit from the visitor economy contribute to it in a fair way.
- We continue to invest in research and market intelligence – a new Visitor Survey is being carried out by the South West Research Company and results will be available this winter.

2022/2023 Highlights

VISITOR SERVICES

- 34,700 people visited the TIC in 2022 – many more than in 2021, when there were, 26,500 visits – that’s an increase of 27% year on year. Spend remained high, total TIC income was £168,500. This was the first year since the COVID-19 pandemic the TIC was not affected by national lockdowns.



PUBLIC RELATIONS AND MEDIA

- The IP continues to invest in Public Relations via traditional media, both online and print, plus digital activity through social media influencers.
- In 2022, the IP secured 61 pieces of coverage including high-value print pieces in monthly glossies, National newspapers and niche food & drink publications; plus broadcast heavyweights such as BBC Radio 4 Ramblings and ITV’s Rick Stein’s Cornwall. The IP managed 11 press trips including Sainsbury’s Magazine, National Geographic TV, Cornwall Life and luxury title Country Homes & Interiors.



CULTURAL DEVELOPMENT

- IP worked with the Council of the Isles of Scilly to secure another round of Arts Council England investment in our common interests in the cultural development agenda.
- Key priorities include engagement with the creative industries sector on Scilly, creating bespoke cultural events including the Creative Scilly programme, raising awareness of local artists, and developing relationships with mainland partners in ongoing investment in cultural development in Scilly.

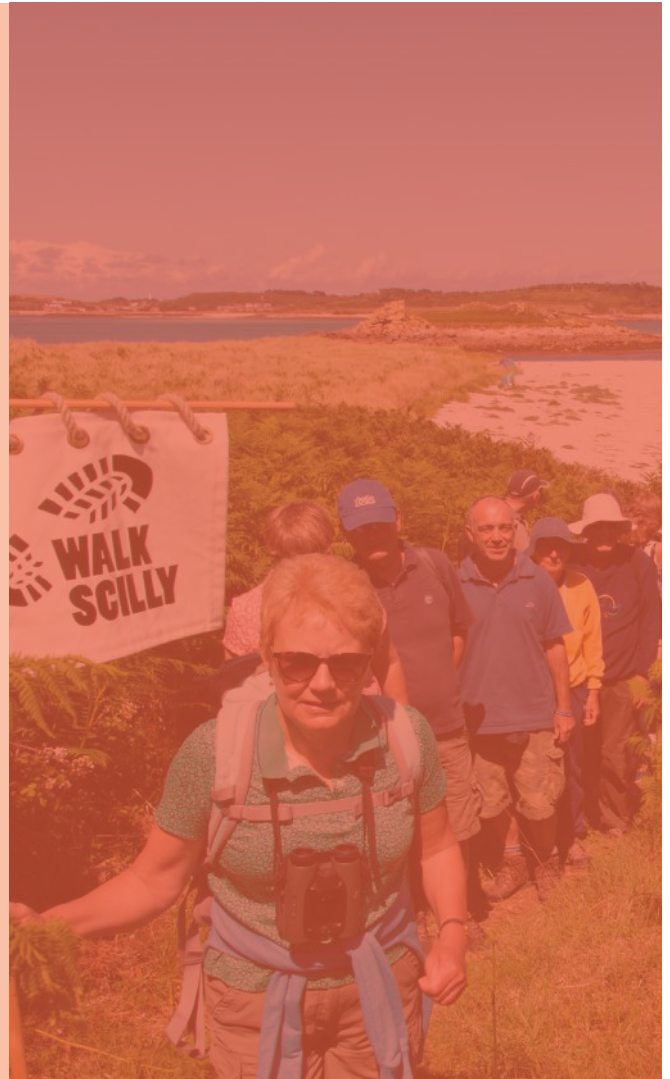
INDUSTRY SUPPORT

- IP constantly undertakes to act as a conduit to business services, funding opportunities, education, advice, and opportunities for its members – working in partnership with other organisations and service providers.
- Membership comms have been improved with freshly designed newsletters – a weekly industry and partner update and a monthly PR, Marketing and Event update.
- Dedicated monthly drop-in sessions have been introduced.
- We encourage our members to seek our advice on anything from quality schemes to IT queries and from business support to regulatory issues.
- A revamped Supply Scilly will take place in February 2024.
- A review will take place of B2B offerings and engagement on Scilly and with mainland partners.

2022/2023 Highlights

EVENTS

- The IP continues to invest in events by supporting existing ones and developing its own programme to help fill quieter periods.
- We are now an official partner in delivering the World Pilot Gig Championships and taking responsibility for the visitor and spectator experience and will be working with partners to enhance the event whilst ensuring it keeps true to its origins.
- Elevating existing traditional favourites by introducing special guests such as wine writer and broadcaster Oz Clark for Taste of Scilly 2023 and acclaimed Author Raynor Winn for Walk Scilly 2023, whilst championing our own on island talent.
- Preparation for new events in 2024 such as “Ocean Scilly” towards the end of August next year to add to the offering and help fill any potential gaps during the season and reinvigorating staples such as Creative Scilly.





We have been with the Islands' Partnership now for nearly four years. The team have been really helpful guiding us through the process of setting up our accommodation on the Visit Isles of Scilly website.

We have just one small self catering unit but our needs have always been treated as importantly as any other business. Everyone has been really supportive in helping us negotiate the new availability system and we appreciate their hard work in finding the best product for the islands.

**Paul and Sarah Whittaker,
Top Deck**



As a supporter of the IP for a number of years, we are absolutely delighted with the results. We've collaborated with them on a number of events this year including Supply Scilly and Taste of Scilly. It's a pleasure to work with them on events that benefit businesses on Scilly and our visitors. In these testing times with people watching their pennies the work they do driving visitors to the islands is essential for our continued, collective success. The IP really does put the islands on the map.

**Nick George,
The Mermaid Inn**



Scilly Sea Safaris cannot recommend the Islands' Partnership enough. They have been so helpful and encouraging from our start up. This team will certainly go the extra mile to promote your business and the future of the islands too.

**Dave and Sarah McBride,
Scilly Sea Safaris**



We have been with the Islands' Partnership now for a number of years and are very grateful for their ongoing support, work and collective effort to put the destination in front of people.

Whether it is with events, marketing purposes and generating leads for our business – the collective thinking of the Islands' Partnership has improved our reach as a destination along with continuing to open new doors and experiences across the Island and Islands. Not only helping the Islands become known, but also being a key reason in Karma St. Martin's also continuing to grow its loyal customer base and new audiences.

**Scott Fisher,
Karma, St. Martin's**

Membership



REMEMBER...

The Islands' Partnership is a not-for-profit organisation and every contribution made by businesses on the islands is spent on growing the value of Scilly's visitor economy.

MEMBERSHIP BENEFITS

PROVEN MARKETING CHANNELS

- Our website visitislesofscilly.com is the official destination website for the islands; in 2022/23 there were 615,000 users of the website - 12% more than the year before.
- Nearly 720K sessions on the website and 2.2M pageviews – half of these were of the accommodation pages.
- 100K people subscribe to our email marketing and receive our newsletters. Members of IP find the opportunity of sharing their message on this channel valuable especially with average open rate up 17% to nearly 35%.
- Facebook referrals to our website are up 123% year over year for existing users, but for new users, up by 158%. Referrals from our Linktree account to the website is up 325%.
- We are responsible for much of the printed collateral that is aligned to our brand, promoting our visitor offering and active events programme, and distributed across the islands and online.
- We are responsible for much of the press and media coverage for Scilly – we feature only member businesses who then benefit directly from profile in the resulting coverage.
- Our members have access to photography, video content, branding and marketing assets which complement members' own brands with a recognisable Scilly destination identity.

ACCESS TO DATA AND THE LATEST RESEARCH

IP invests in market research and intelligence to ensure we know who our visitors are, where they are from, their preferences and attitudes to Scilly. This insight, together with figures for the number of visitors coming to Scilly and how much they spend etc is available to members to help inform your own plans.

ACCESS TO TRAINING, BUSINESS ADVICE AND INDUSTRY NEWS

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

BENEFITS FOR THE ISLANDS

EVENTS

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

PROMOTION

However big or small your business, when signing up to be a member of the IP, you buy into the benefits of collaborative investment in marketing Scilly as a visitor destination. Working together on a partnership approach to communicating the benefits of the destination is crucial to the visitor economy and it can only take place with all our members' support and contribution.

TOURIST INFORMATION CENTRE

With no public funding of the core operational costs of the TIC, support from our members is vital to ensure the continued operation of the TIC for the benefit of visitors and businesses. And this includes its proven role in helping house stranded passengers.

FLYING THE FLAG FOR TOURISM

Our small team champions the tourism visitor economy on Scilly and works with colleagues and partners regionally and nationally. We fly the flag for Scilly at every opportunity, making sure the islands' interests and its vital economy are represented and supported.

SUPPORTING THE LOCAL ECONOMY

Tourism visitor spending is the core of the Scillonian economy. Our work contributes to visitor retention and attracts new visitors; the money visitors spend directly with visitor facing businesses creates secondary local expenditure across the entire island economy – its services and trades. More higher spending visitors benefits and sustains the whole of our economy.

Looking Ahead...



Our strategic priorities and work programme for the 2023/24 year ahead reflect a business as usual approach to retention and growth, with a renewed focus on inevitable forthcoming competition in the continued high inflation economic conditions ahead:

- Building on the value of the start and end of the season and making the most of domestic demand we will, working with our partners, continue to support businesses to stay open for a longer season with marketing content, media communications and events that support the visitor economy throughout the year.
- Continue to improve the [visitislesofscilly.com](https://www.visitislesofscilly.com) website and with a continued focus on the most effective online booking options for our members.
- Maintain the momentum of cultural development and creative sector on Scilly, particularly with regards to development of a new museum and cultural centre - working with purpose with our partners, especially the Council of the Isles of Scilly.
- Ensure that the Tourist Information Centre and related IP led visitor services continue to provide a professional and effective marketing and communications platform for members and advertisers and a valuable service for visitors.
- Work as a constructive member of the Islands' Transport Board to provide strategic input to the islands' transport agenda and with common purpose with strategic partners, transport operators and infrastructure owners.
- Continue to work in close partnership with the Isles of Scilly Wildlife Trust to encourage businesses and visitors to adopt sustainable, low carbon practices to protect and preserve the unique environment on which we depend.
- Provide sector and industry leadership, acting as the spokesperson for the islands' visitor economy, providing strategic insight and input on matters affecting or impacting Scilly's visitor economy.

Marketing Opportunities



We want to help you market your business. Our marketing and advertising opportunities provide businesses with proven reach and return.

EMAIL MARKETING

The size of our customer database has grown significantly – 100K contacts have now signed up and these Scilly lovers have an appetite for your good news and offers.

We regularly send our contacts emails with reasons to come to Scilly; each newsletter is the subject of a content marketing plan and offers opportunities for member content.

Open rates for our emails are much higher than industry averages and have increased another 17% over last year to nearly 35% and they are consistently high.



VISITISLESOFSCILLY.COM

Our website is exactly where it needs to be in Google search results:

1st for -

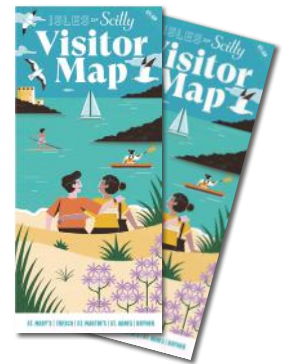
- Isles of Scilly
 - Isles of Scilly accommodation
 - Isles of Scilly things to do
 - Isles of Scilly places to eat
 - Isles of Scilly B&B
 - Isles of Scilly cottages
 - Isles of Scilly attractions
- The website is used by 62% of all staying visitors and 75% of first-time visitors use it when planning and booking their visit to the islands.
- 32% of respondents considered the www.visitislesofscilly.com website most useful to them when planning and booking their visit to the Isles of Scilly.
- The majority of respondents on social media (82%) used Facebook on a regular basis.



POCKET MAP

We continue to make improvements to the popular on-island Pocket Map with more information about things to do and places to eat and drink. Your support makes it comprehensive, financially viable and valuable for guests.

Our new-look visitor map is distributed by the TIC and many other outlets the map is incredibly popular with visitors planning their days out.



TOURIST INFORMATION CENTRE

The TIC has been operating at its normal capacity in 2023 and communicates with a vast number of visitors in person, on the phone, by email and through social media. It provides an outlet for boat ticket sales, bespoke advice, maps, souvenirs, event tickets and of course What's On!



PUBLIC RELATIONS AND THE MEDIA

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

This year our work led to the following:

- 79M Online Reach
- 2.6M Print Reach
- 333K Social Media Reach
- 10.6M Broadcast Reach

WORLD PILOT GIG CHAMPIONSHIPS PROGRAMME

A much-loved souvenir piece of print, with a long shelf-life, loved by spectators and participants of this major event in the Islands' Partnership festival calendar. 2-3k copies produced for each year's championships which are aimed at on island spectators and participants and made available during the event.

EVENTS

Since the end of Covid-19 restrictions, the IP has reintroduced and bolstered its events programme which is run by our new Events Co-ordinator. More events are scheduled for 2024 and the majority of dates have been confirmed and communicated to market. The IP is collaborating with other existing events including taking on a greater role in the delivery of the World Pilot Gig Championships and looking into a new outdoor endurance event.

CONTENT MARKETING

The IP delivers marketing content planned around the calendar - raising awareness of seasonal and product benefits and responding to consumer buying behaviour. This year we have partnered with a host of mainland partners, promoting their visit to drive further interest and reach. We also work with partners to undertake tactical promotions. This approach means we need to work closely with members to create story content and highlight product benefits which resonate with our market.



Joining the Islands' Partnership is easy...

Contact our team by email, phone or by post and we can share the details and advantages of becoming a member. If you are on the islands, please make an appointment to meet us to discuss the benefits of membership.

enquiries@visitislesofscilly.com

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