

Isles of Scilly Online Visitor Survey 2015

Final report

Produced for and on behalf of the Islands' Partnership
by The South West Research Company Ltd.

May 2016



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Summary

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Summary

- Almost all respondents were staying overnight on the Islands (94%).
- Two thirds of all visitors to the Islands were aged 45 years or over (66%). Just 13% of visitors were aged 17 or under whilst 9% were aged 18-34 and 12% 35-44 years.
- The average group size was 2.68 people.
- 87% of groups contained adults only.
- 96% of visitors were UK residents. Approximately 10% lived within the TR (Truro) postal code area and 7% within the PL (Plymouth) postal code area.
- 9% of overseas visitors were from Germany and 8% were from France.
- 70% of visitors were on a repeat visit to the Islands. The average number of previous visits to the Islands was 11.5.
- The peak months for visits to the Islands were June and August.
- The peak months for visits of 2-4 nights to the Islands were June and September, compared with August and September for trips of 5-7 nights and June, July and August for trips of 8+ nights.
- 53% of visitors were visiting on their main holiday of the year.
- 53% of visitors were spending between 5 and 7 days on the Islands.
- 30% of visitors said it was very important that they arrived on the Islands on a Saturday, whilst 21% said the same about a Thursday and 20% a Friday.

Summary

- 49% of respondents were staying in self-catering accommodation on the Islands whilst a further 36% were staying in a hotel or B&B/guest house.
- 41% of respondents booked online with their accommodation provider.
- 59% of respondents felt it was 'very important' or 'important' that their accommodation on the Islands had a quality (star) rating.
- 81% of respondents had stayed on St Mary's.
- The scenery and/or peace and quiet (92% and 86% respectively) inspired the largest proportions of respondents to visit the Islands.
- The largest proportion of visitors (49%) had first heard about the Isles of Scilly from a previous visit and/or a further 20% from a personal recommendation.
- 62% and 54% of respondents respectively had used the www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites when planning and booking their visit to the Isles of Scilly.
- 34% 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 (83%) used Facebook on a regular basis.
- A third of respondents had booked their holiday to the Islands 9 months or more in advance.
- 52% of respondents had travelled to the Islands on the Scillonian and a further 45% via the Skybus*
- Around three quarters of respondents (72%) had reached their connecting flight or boat to the Islands by car.

Summary

- The quality of the travel information, frequency of service, customer service and overall service all received good average scores of between 3.01 and 3.24 out of 4.00.
- On the whole Land's End and St Mary's Airport received the highest levels of satisfaction amongst visitors and Penzance Quay the lowest.
- Visitor satisfaction levels with their Island experience were, on the whole, very high. Satisfaction levels were highest for the general atmosphere and sense of welcome and lowest for the quality and range of evening entertainment.
- The areas for attention are signage, value for money of transport on St. Mary's, availability of public toilets, value for money of places to eat & drink, quality and range of grocery provision shops, range of other shops and evening entertainment.
- 51% of visitors felt the airport development had 'greatly improved' or 'improved' the Islands, whilst 61% said the same about the Porthcressa Development.
- The features and activities on the Islands which visitors considered of highest importance to them were walking, rest and relaxation, island-hopping, the beaches, wildlife, local plants and gardens and eating out.
- 63% of visitors said food and drink festivals would encourage them to visit with walking festivals (53%), music events (47%) and maritime festivals (39%) the next most popular. The least popular were comedy events (13%) and sporting events (20%).
- 77% of visitors gave their holiday to the Islands an overall rating of 'excellent' and a further 20% as 'good'. The average mean score for their holiday overall was calculated at 3.74 out of 4.00.
- 98% of visitors said they would recommend the Isles of Scilly as a holiday destination to their friends or family.
- 69% of respondents said they would consider taking a winter break on the Isles of Scilly.

Introduction

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Background & research objectives

In 2014, the Isles of Scilly attracted approximately 67,600 staying visits from UK and overseas visitors and approximately 27,000 day visits (excluding cruise passengers) (*Source; Value of Tourism 2014 – South West Research Company Ltd.*).

The Islands' Partnership (IP) is a non-profit making company that is limited by guarantee. It is funded entirely by membership subscription together with some corporate sponsorship. The Partnership is responsible for marketing the Isles of Scilly as a all encompassing destination and aims to provide the resources, energy and focus to enable its members to develop the Islands' tourism economy to its full potential. It reaches out to all sectors of the business community championing their needs and providing a shared platform to develop common goals.

The Islands' Partnership were keen to undertake further research during 2015 to build upon the face to face visitor survey undertaken in 2013 and the online visitor survey during 2014 to provide them with an up-to-date profile of visitors and visit characteristics to the Islands. This report presents the findings of an online survey amongst visitors to the Isles of Scilly conducted throughout 2015. The survey design, online set-up and data collection was undertaken by the Islands' Partnership who then commissioned The South West Research Company to analyse and report on the online survey findings. A total of 2,046 useable online submissions were received.

Knowing who their visitors are, why they come and what they value about their holiday to the Isles of Scilly allows the Islands' Partnership to build a picture of the visitor experience that is crucial to improving their businesses and tourism industry. More specifically the findings of this survey will be used to:

- Monitor the overall performance of the industry
- Provide local businesses with the data they need to align their services to the expectations and needs of their customers
- Provide information that would help to shape future marketing planning and business development
- Develop an evidence base in order to support future business plans and /or any future applications for either national or European grant support.

The results of the survey will be invaluable in steering future marketing strategies and campaigns for the Isles of Scilly , in making recommendations for future product developments and assist with identifying any emerging trends in the profile of tourism to the Islands as a destination.

Analysis segments

Throughout this report results are presented for all visitors. A number of additional analysis segments have also been derived from the survey data and are referenced where useful and appropriate within this report to aid with the interpretation of findings and the understanding gained through this research.

The survey analysis segments and their associated sample sizes are shown below. The abbreviations used for each segment type throughout this report are also shown in brackets.

Visitor type:

- Staying visitor (Sample 1,854) **(STAYING)**
- Day visitor (Sample 115) **(DAY)**

Time of year when visited:

- Jan-Mar (Sample 40) **(JAN-MAR)**
- Apr-Jun (Sample 766) **(APR-JUN)**
- Jul-Sept (Sample 1,096) **(JUL-SEPT)**
- Oct-Dec (Sample 89) **(OCT-DEC)**

Previous visits:

- First time visitor (Sample 594) **(FIRST TIME)**
- Repeat visitor (Sample 1,392) **(REPEAT)**

Length of stay:

- 2-4 days (Sample 256) **(2-4 DAYS)**
- 5-7 days (Sample 1,053) **(5-7 DAYS)**
- 8+ days (Sample 545) **(8+ DAYS)**

Type of trip:

- Main holiday (Sample 1,026) **(MAIN)**
- Second holiday (Sample 474) **(SECOND)**
- Short break (Sample 349) **(SHORT)**

Islands stayed on:

- St Mary's (Sample 1,563) **(ST MARY'S)**
- St Agnes (Sample 172) **(ST AGNES)**
- Bryher (Sample 222) **(BRYHER)**
- Tresco (Sample 324) **(TRESKO)**
- St Martin's (Sample 247) **(ST MARTIN'S)**

How travelled to the Islands:

- Skybus (Sample 871) **(SKYBUS)**
- Scillonian III (Sample 998) **(SCILLONIAN)**
- Private transport (Sample 31) **(PRIVATE)**
- Cruise ship (Sample 32) **(CRUISE)**

Point to Note – Sample Sizes

When interpreting the findings within this report it should be noted that due to the design and set up of the online questionnaire not all respondents answered each of the questions. This was because respondents were able to skip through questions if they wished or a non-response option was not provided for them to enable them to answer the question e.g. Don't know, not applicable, none of the above etc. As a result, the base counts for the analysis of each of the questions in this report vary throughout and, therefore, the results for each question are for those respondents that chose to respond to the question and are not necessarily for all respondents who took part in the online survey.

Visitor Profile

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Almost all respondents were staying overnight on the Islands.

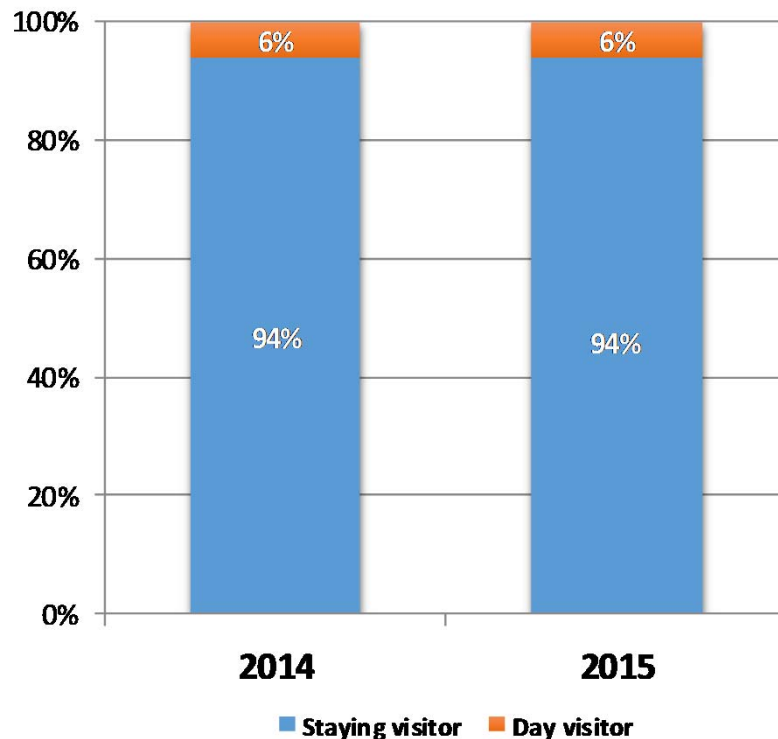
66% of visitors were aged 45+. 87% of groups contained adults only.

94% of respondents were staying overnight on the Isles of Scilly with this proportion relatively consistent across all the segments. 6% of respondents were on a day trip to the Islands with this proportion highest amongst first time visitors (13%). The results were unchanged compared with the 2014 survey.

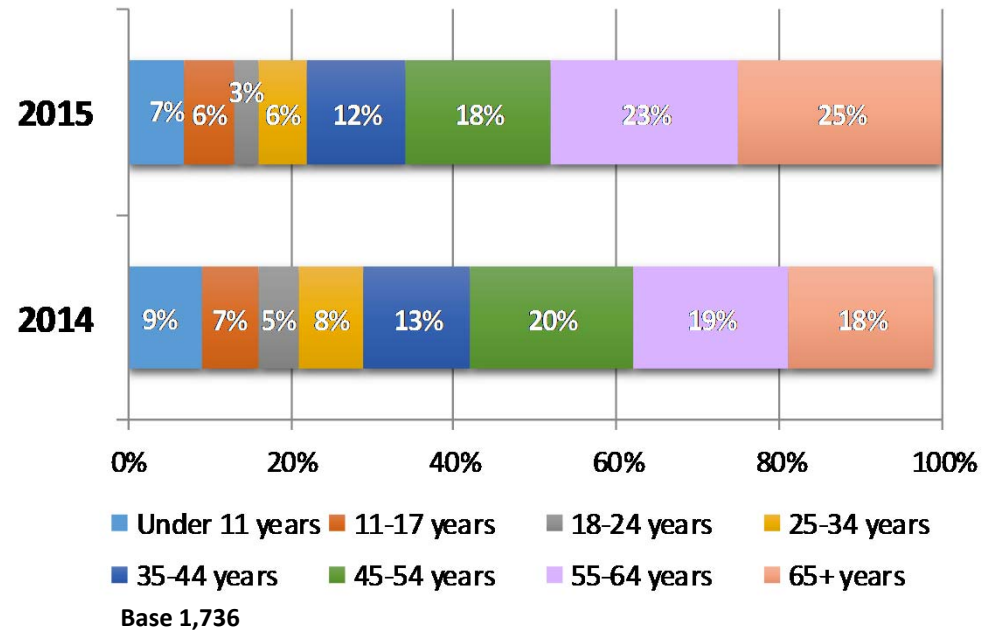
Two thirds of all visitors to the Islands were aged 45 years or over (66%) compared with 57% during 2014 and including 25% aged 65+ years (18% 2014), 23% aged 55-64 years (19% 2014) and 18% aged 45-54 years (20% 2014). Just 13% of visitors were aged 17 or under (16% 2014) whilst 9% were aged 18-34 and 12% 35-44 years (13% in each case during 2014).

The average group size was 2.68 people (2.49 2014).

Visitor type



Age group



87% of groups contained adults only (85% 2014) and 13% contained children aged 17 years or under (16% 2014).

96% of visitors were UK residents. Approximately 10% lived within the TR (Truro) postal code area and 7% within the PL (Plymouth) postal code area.

9% of overseas visitors were from Germany and 8% were from France.

Survey respondents were asked to provide the postal code of their main residence (or country of residence if from overseas) to analyse where they came from.

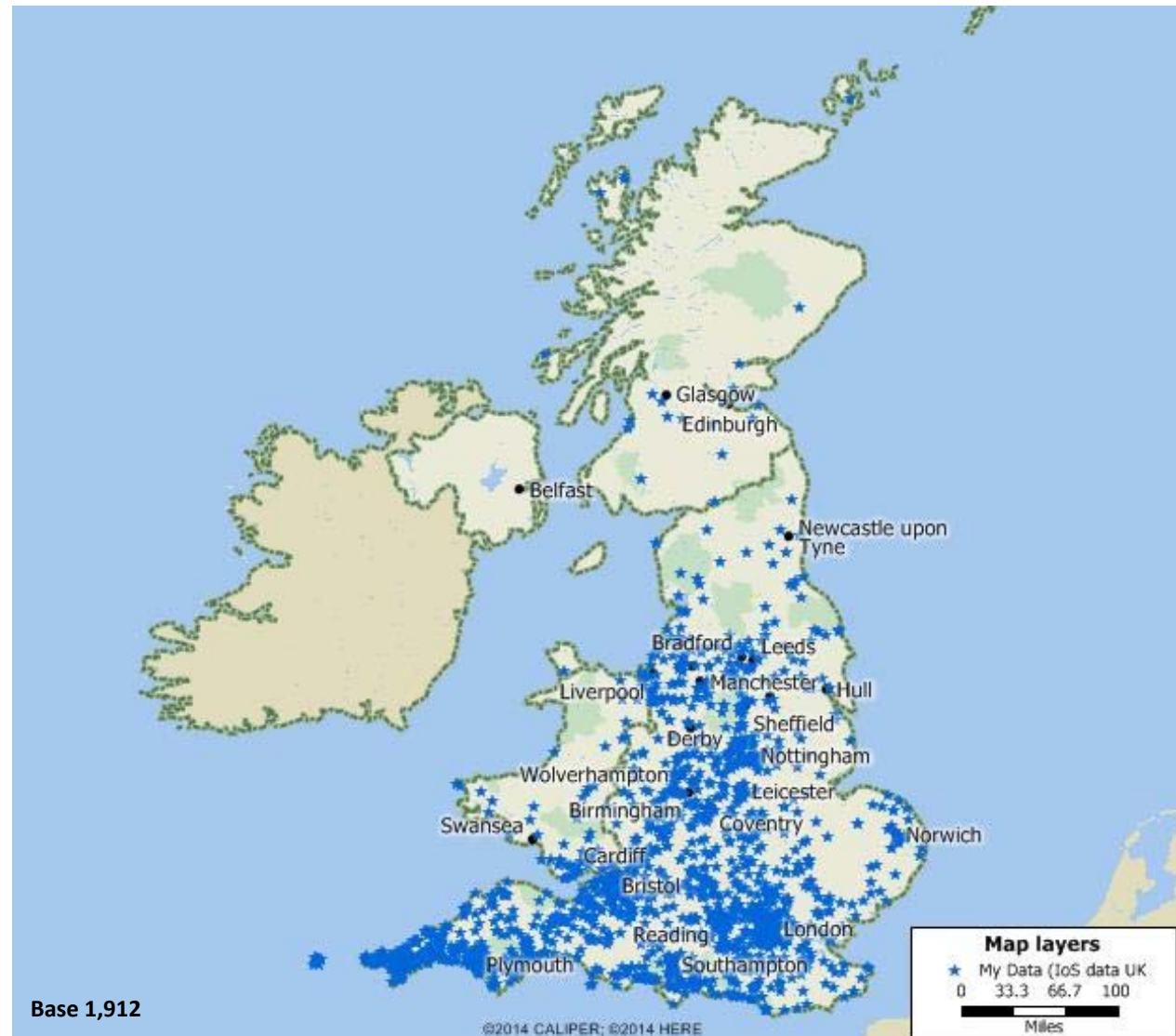
96% of respondents were UK residents and 4% were from overseas.

By analysing these postcodes using specialist mapping software, it was possible to map the home postcode of the UK residents.

Around 10% of all UK respondents lived within the TR (Truro) postal code area, including 2% within postal code district of TR21 on the Isles of Scilly. 7% lived within PL (Plymouth) and 5% in each case within EX (Exeter) and BS (Bristol) postal code areas.

Around 9% of overseas visitors were from Germany and approx. 8% from France.

Please refer to the separate profiling report for a full detailed analysis of the UK postcode data.



Postcode area– UK RESPONDENTS (96% OF SAMPLE)		Country of origin – OVERSEAS RESPONDENTS (4% OF SAMPLE)	
TR – Truro	10%	Germany	9%
PL - Plymouth	7%	France	8%
EX – Exeter	5%	Italy	4%
BS - Bristol	5%	Sweden	4%
BA - Bath	3%	USA	4%
RG - Reading	3%	Australia	3%
E/EC/NW/SE/SW/W/N/WC (LONDON POSTCODES)	3%	Belgium	3%
TQ - Torquay	2%	Eire	3%
OX - Oxford	2%	Norway	3%
GL - Gloucester	2%	Other overseas/unspecified	57%
TA - Taunton	2%	Base	75
DE - Derby	2%		
SN - Swindon	2%		
CV - Coventry	2%		
NG - Nottingham	2%		
PO - Portsmouth	2%		
BH - Bournemouth	2%		
LE - Leicester	2%		
Other UK	45%		
Base	1,837		

The Islands attract a large number of frequent visitors who have been visiting the Islands for many years. 70% of visitors were on a repeat visit to the Islands.

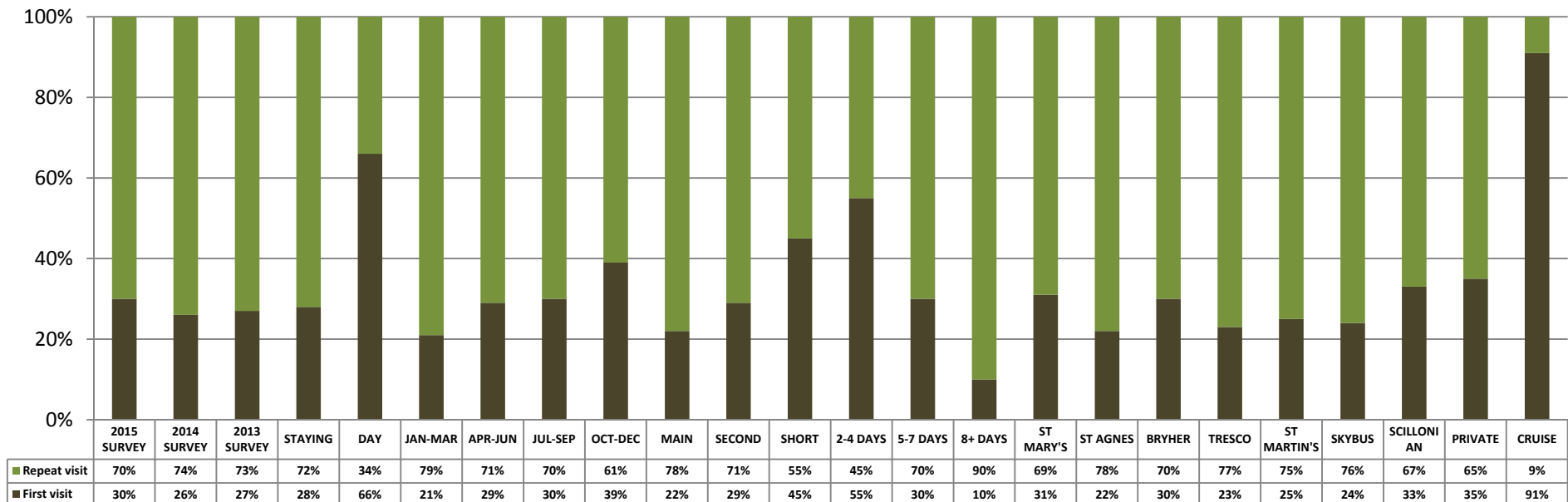
The average number of previous visits to the Islands was 11.5.

The Islands attract a large number of frequent visitors who have been visiting the Islands for many years.

70% of respondents were on a repeat visit to the Isles of Scilly (74% and 73% during the 2014 and 2013 surveys respectively). This proportion was highest amongst those staying overnight on the Islands (72%), those visiting during January to March (79%), those on their main holiday of the year (78%), those staying for 8+ days (90%), those staying on St Agnes and Tresco (78% and 77% respectively) and those arriving by Skybus (76%). The average number of previous visits to the Islands was 11.5.

66% of day visitors, 39% of those visiting during October to December, 45% of those on a short break, 55% of those staying for 2-4 days, 31% of those staying on St Mary's, 30% of those staying on Bryher and 91% of those arriving by cruise ship were on their first ever visit to the Islands.

Whether first time or repeat visit to the Isles of Scilly



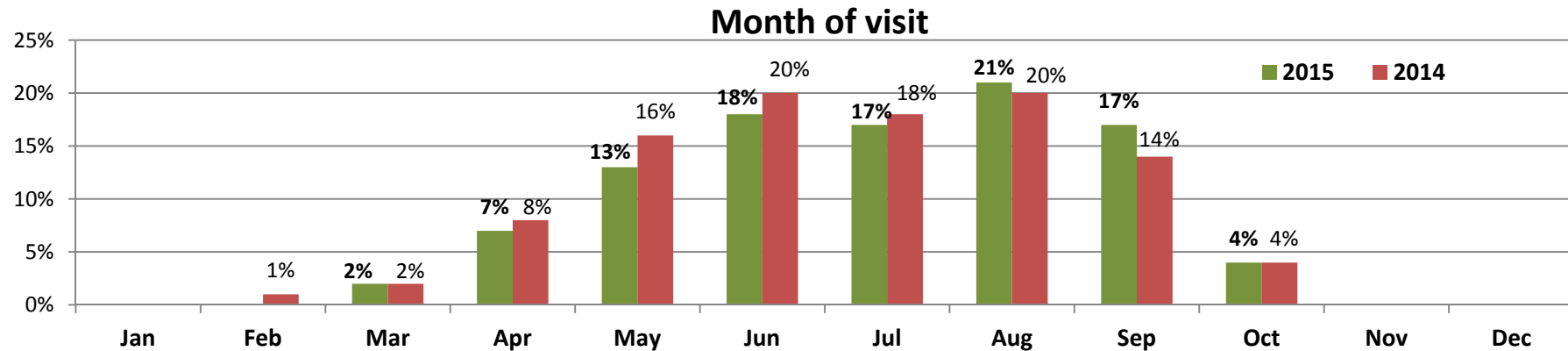
Characteristics of Visits

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The peak months for visits to the Islands were June and August.

The peak months for visits to the Islands were June and August with 18% and 21% of respondents respectively having visited during each of these months (20% in each case during 2014) along with 17% in each case during July and September (18% and 14% respectively during 2014).



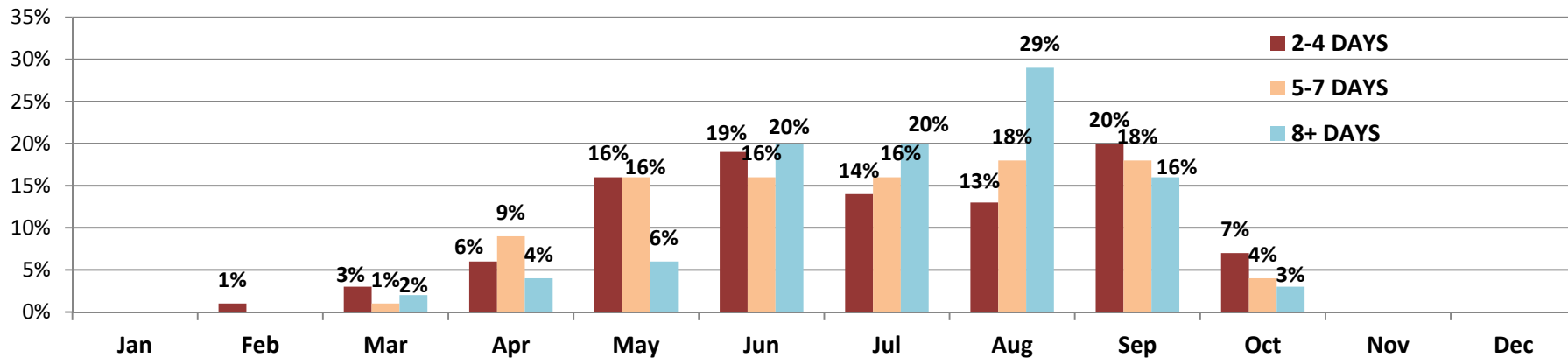
Base 1,991

When the data was further analysed by type of trip a higher proportion of visitors on their main holiday of the year had visited the Isles of Scilly during the months of July and August (21% and 25% respectively) compared with those on a second holiday or short break and as was also the case during the 2014 survey. In contrast, during June a higher proportion of those visitors on their second holiday had visited the Islands (19%) compared with those on their main holiday or a short break. May (18%) and September (23%) are key months for short breaks to the Islands. There was little variation in the results according to all other segments.

The peak months for visits of 2-4 nights to the Islands were June and September, compared with August and September for trips of 5-7 nights and June, July and August for trips of 8+ nights.

The peak months for visits of 2-4 nights to the Islands were June (19%) and September (20%), compared with August and September for trips of 5-7 nights (18% in each case) and June (20%), July (20%) and August (29%) for trips of 8+ nights.

Month of visit by length of trip



Base 1,968

Month of visit by year

Year	Type of trip	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2014	Main holiday	-	1%	1%	7%	15%	20%	21%	26%	12%	3%	-	2%
	Secondary holiday	-	2%	4%	12%	16%	19%	16%	15%	16%	5%	-	2%
	Short break	-	1%	2%	8%	21%	22%	14%	12%	16%	7%	-	-
2015	Main holiday	-	-	1%	5%	11%	18%	21%	25%	16%	3%	-	-
	Secondary holiday	-	-	3%	9%	14%	19%	14%	16%	18%	5%	-	-
	Short break	-	-	3%	11%	18%	16%	11%	13%	23%	6%	-	-

Base 1,950 (2015)

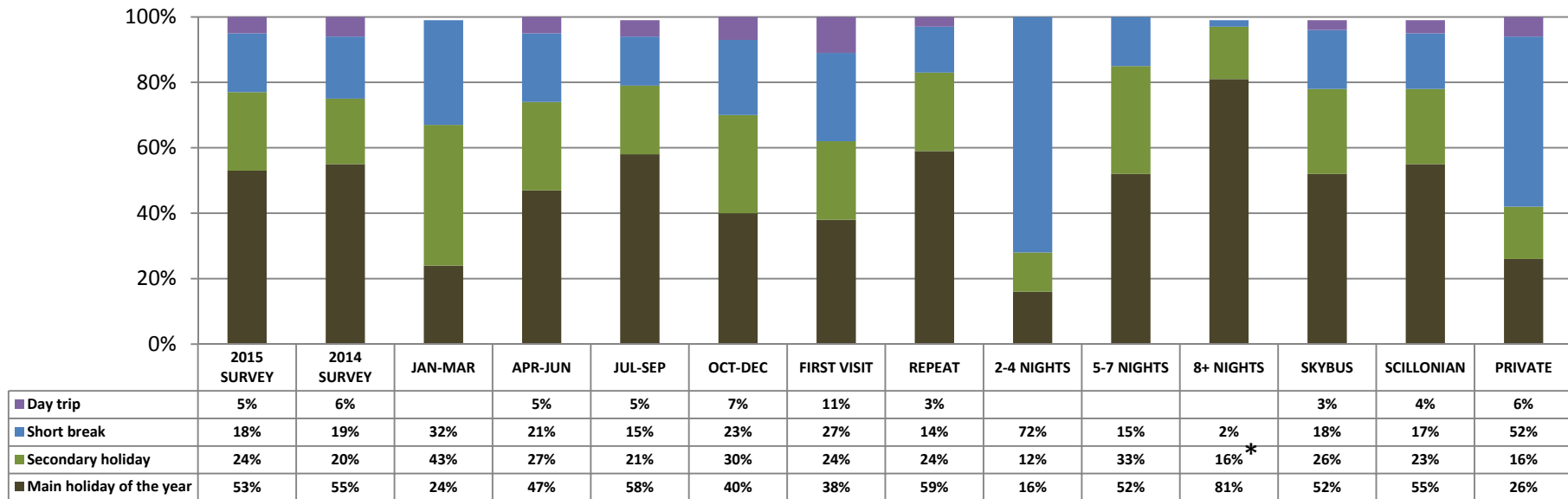
53% of visitors were visiting on their main holiday of the year.

The majority of respondents (53%) were visiting on their main holiday of the year (55% 2014) with this proportion highest amongst those visiting during the months of July to September (58%), those on a repeat visit (59%), those staying for 8+ nights (81%) and those arriving via the Skybus (52%) and Scillonian (55%).

24% of respondents were on a secondary holiday to the Isles of Scilly (20% 2014) including 43% of those respondents visiting during the months of January to March and 33% staying for between 5 and 7 nights. 18% of respondents were on a short break (19% 2014) including 32% of those visiting the Islands during the months of January to March, 27% of first time visitors, 72% staying for 2-4 nights on the Islands and 52% of those that arrived by private transport.

69% of those arriving by cruise ship were on a day trip to the Islands. There was little variation in the results according to the Island which respondents had stayed on.

Type of trip



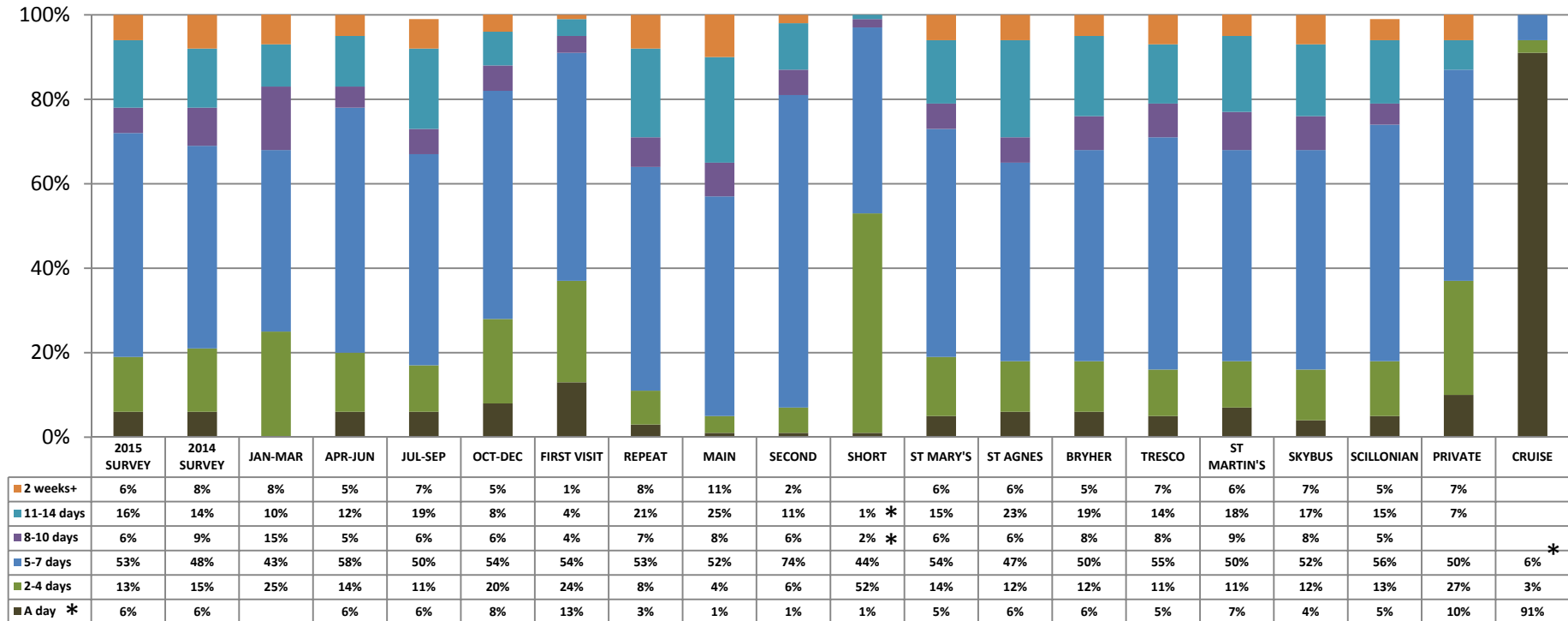
Base 1,952. * Please note that this percentage is not an error but due to the self-selecting nature of the survey and possible misinterpretation of the question.

53% of visitors were spending between 5 and 7 days on the Islands.

The largest proportion of respondents were spending between 5 and 7 days on the Islands (53%, compared with 48% during 2014) with this proportion highest amongst those on a secondary holiday (74%).

22% of respondents (the same proportion as during 2014) were spending a longer period on the Islands including 16% between 11-14 days (14% 2014) and 6% 2 weeks or longer (8% 2014). 26% of respondents visiting the Islands during July to September, 29% on a repeat visit, 36% on their main holiday of the year, 29% of those staying on St Agnes and 24% who had arrived by Skybus were spending 11+ days on the Isles of Scilly.

Duration of stay on the Islands



Base 1,969 * Please note that these percentages are not errors but due to the self-selecting nature of the survey and possible misinterpretation of the question.

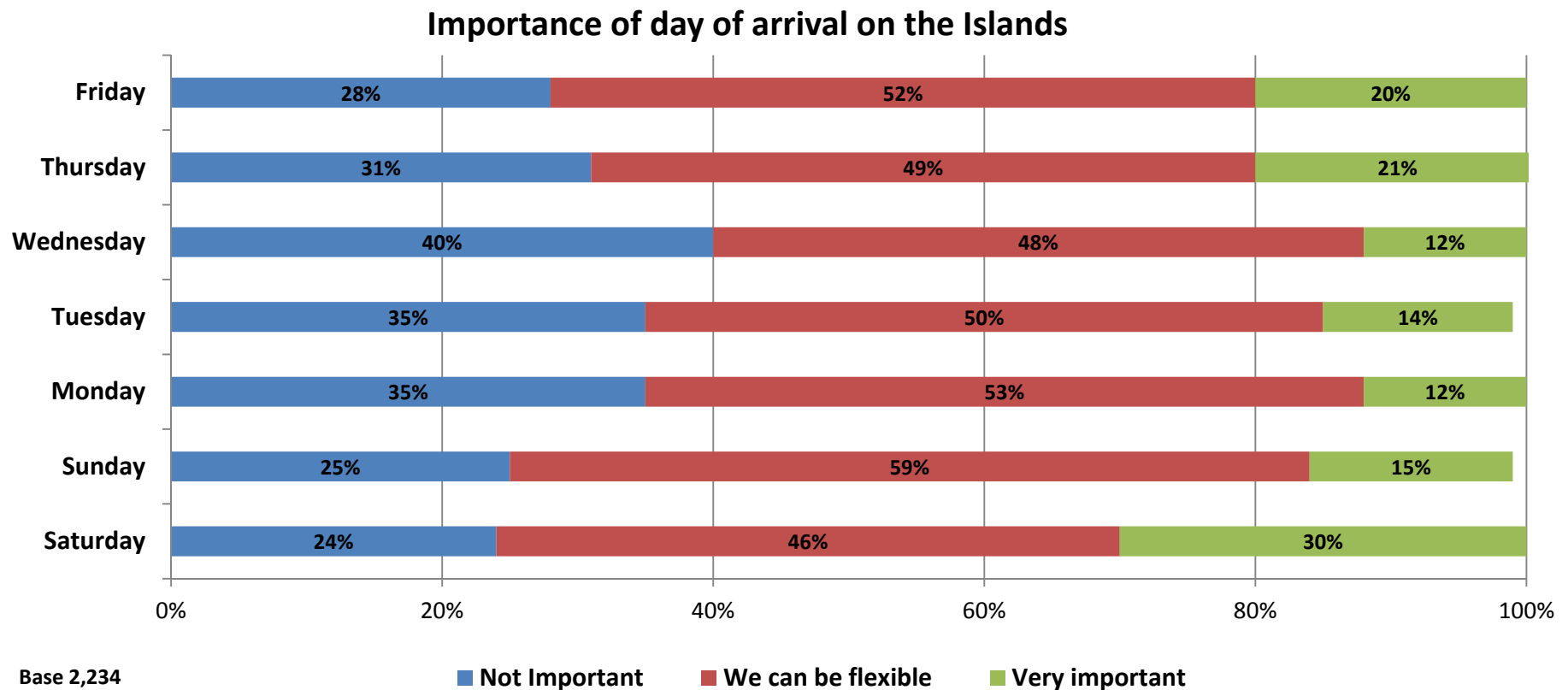
30% of visitors said it was very important that they arrived on the Islands on a Saturday, whilst 21% said the same about a Thursday and 20% a Friday.

Visitors were asked to consider how important it was that they arrived on the Islands on a particular day of the week.

30% of visitors said it was very important that they arrived on a Saturday, whilst 21% said the same about a Thursday and 20% a Friday.

Overall, the largest proportion of respondents in each case (46%-59%) said they could be flexible.

There was little variation in the results according to segment.



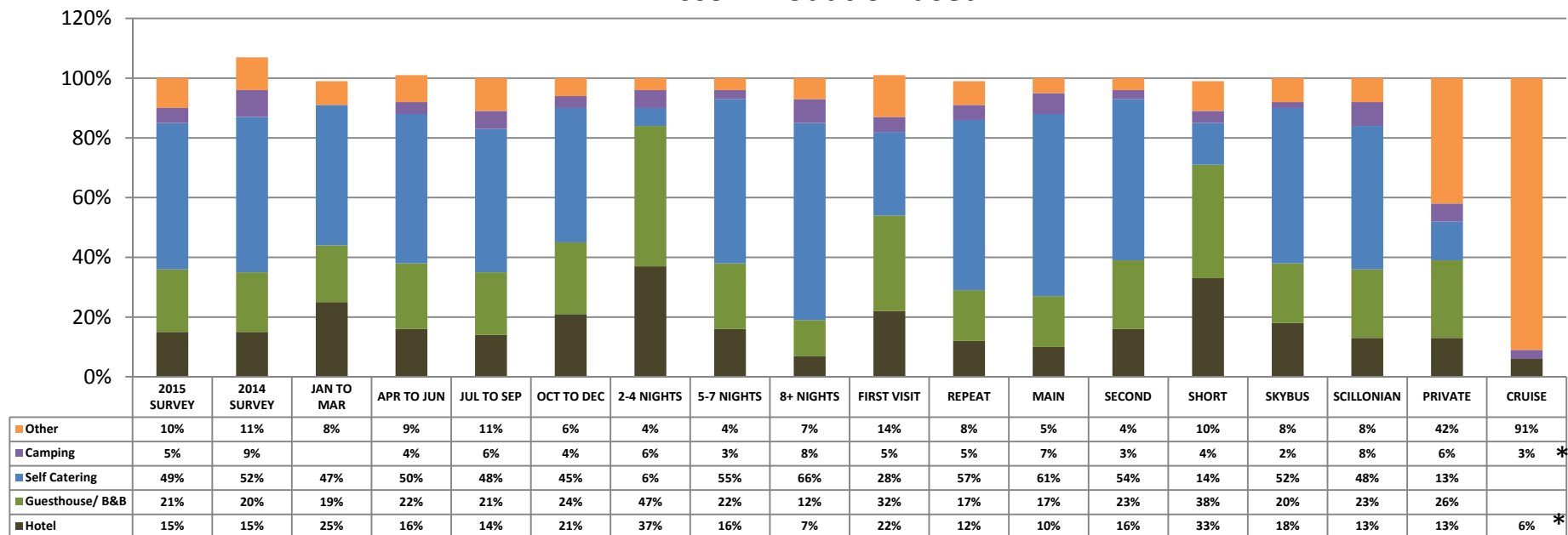
49% of respondents were staying in self-catering accommodation on the Islands whilst a further 36% were staying in a serviced hotel or B&B/guest house.

49% of respondents were staying in self-catering accommodation on the Islands (52% 2014) whilst a further 36% (35% 2014) were staying in a hotel (15%) or B&B/guest house (21%).

Just 5% of respondents were camping during their visit (9% during 2014) whilst 10% had used other types of accommodation (11% 2014). For a full list of the 'other' types of accommodation used by visitors staying overnight on the Islands (10%) please refer to the appendices which accompany this report.

84% of those staying for 2-4 nights, 54% of first time visitors and 71% on a short break used serviced accommodation on the Islands. There was little variation in the type of accommodation used according to which Island respondents had stayed on.

Accommodation used



Base 1,924 * Please note that these percentage are not errors but due to the self-selecting nature of the survey and possible misinterpretation of the question.

* Please note that multiple responses were provided for this question.

41% of respondents booked online with their accommodation provider.

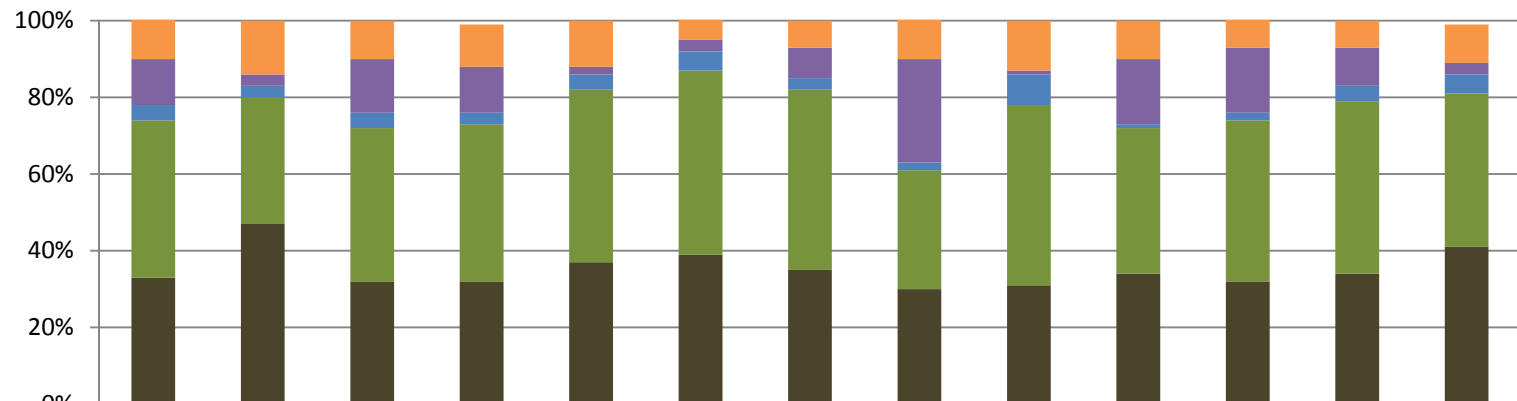
41% of respondents had booked their accommodation online with their chosen accommodation provider whilst a further 33% had done so over the phone with them.

12% of respondents booked during their last visit and 4% booked through a travel agent or tour operator.

The results by segment are shown in the chart below. There was little variation in the results according to the Island which respondents had stayed on.

To see the full list of 'other' ways in which respondents had booked their accommodation (11%) please see the appendices which accompany this report.

How booked accommodation



	2015 SURVEY	JAN TO MAR	APR TO JUN	JUL TO SEP	OCT TO DEC	2-4 NIGHTS	5-7 NIGHTS	8+ NIGHTS	FIRST VISIT	REPEAT	MAIN	SECOND	SHORT
Other	11%	14%	10%	11%	12%	6%	7%	11%	13%	10%	8%	7%	10%
Repeat booking - booked on departure	12%	3%	14%	12%	2%	3%	8%	27%	1% *	17%	17%	10%	3%
Through a travel agent or tour operator	4%	3%	4%	3%	4%	5%	3%	2%	8%	1%	2%	4%	5%
Booked online with accommodation provider	41%	33%	40%	41%	45%	48%	47%	31%	47%	38%	42%	45%	40%
Over the phone with accommodation provider	33%	47%	32%	32%	37%	39%	35%	30%	31%	34%	32%	34%	41%

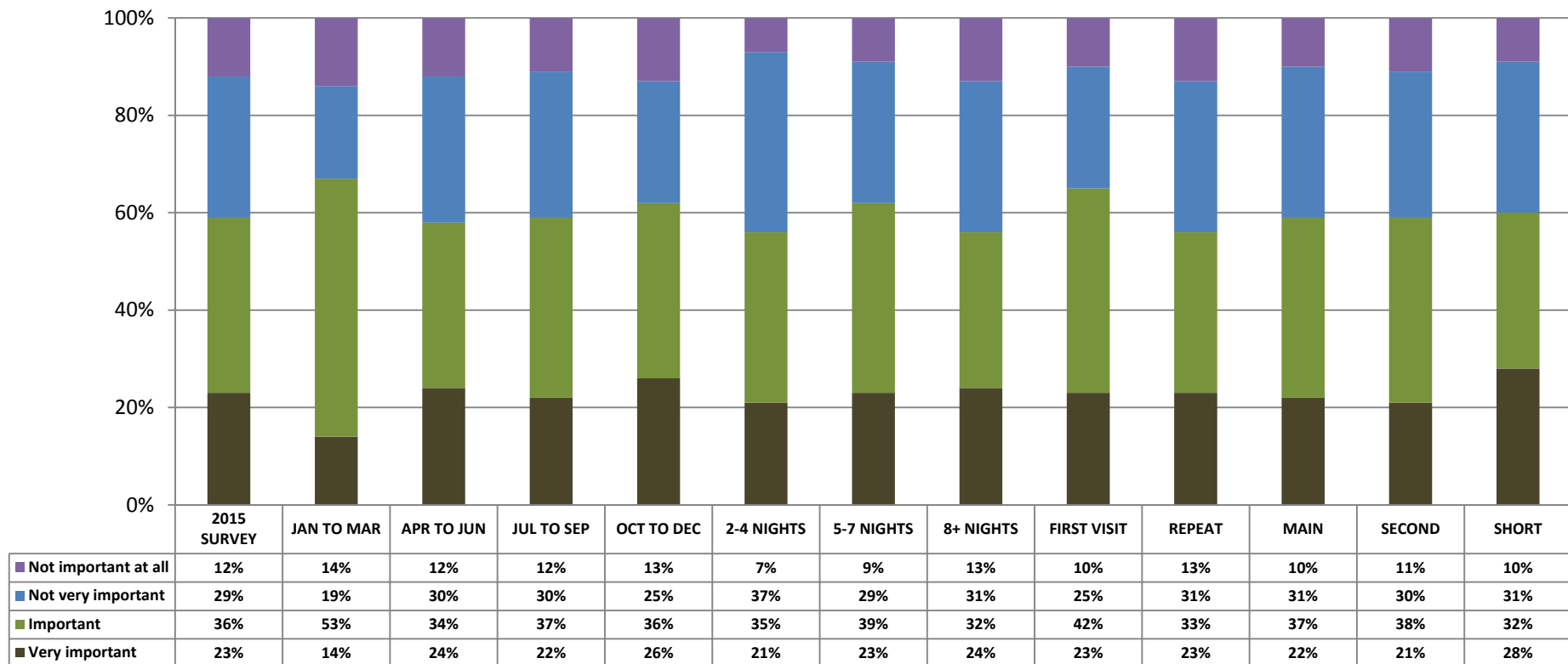
Base 1,923 Please note that this percentage is not an error but due to the self-selecting nature of the survey and possible misinterpretation of the question.

59% of respondents felt it was 'very important' or 'important' that their accommodation on the Islands had a quality (star) rating.

59% of respondents felt it was 'very important' (23%) or 'important' (36%) that their accommodation on the Islands had a quality (star) rating including 67% of visitors to the Islands during the months of January to March, 62% staying for between 5-7 days, 65% of first time visitors and 60% of those on a short break.

There was little variation in the results according to the Island which respondents had stayed on.

Importance of accommodation having a quality (star) rating



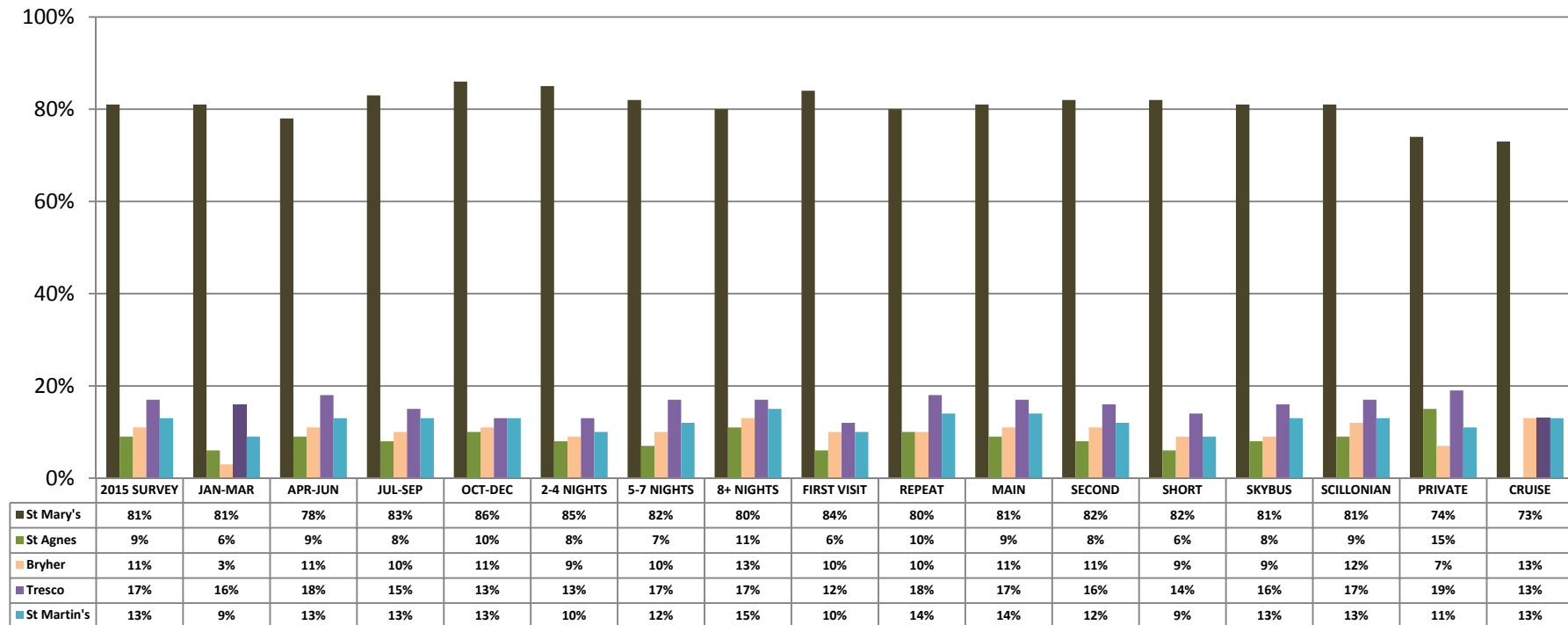
Base 1,918

81% of respondents had stayed on St Mary's.

81% of respondents had stayed on St Mary's during their visit to the Islands with this proportion varying little according to segment.

A further 17% of respondents had stayed on Tresco, 13% on St Martin's, 11% on Bryher and 9% on St Agnes. These proportions remained relatively consistent across the segments with the exception of the proportion of those staying on Bryher during the months of January to March which was considerably less than the result for all visitors at just 3%.

Island where stayed



Base 1,849

Please note that the results in the chart above do not sum to 100% due to this question being a multiple response question e.g. visitors could have stayed on more than one island during their visit to the Isles of Scilly.

The scenery and/or peace and quiet (92% and 86% respectively) inspired the largest proportions of respondents to visit the Islands.

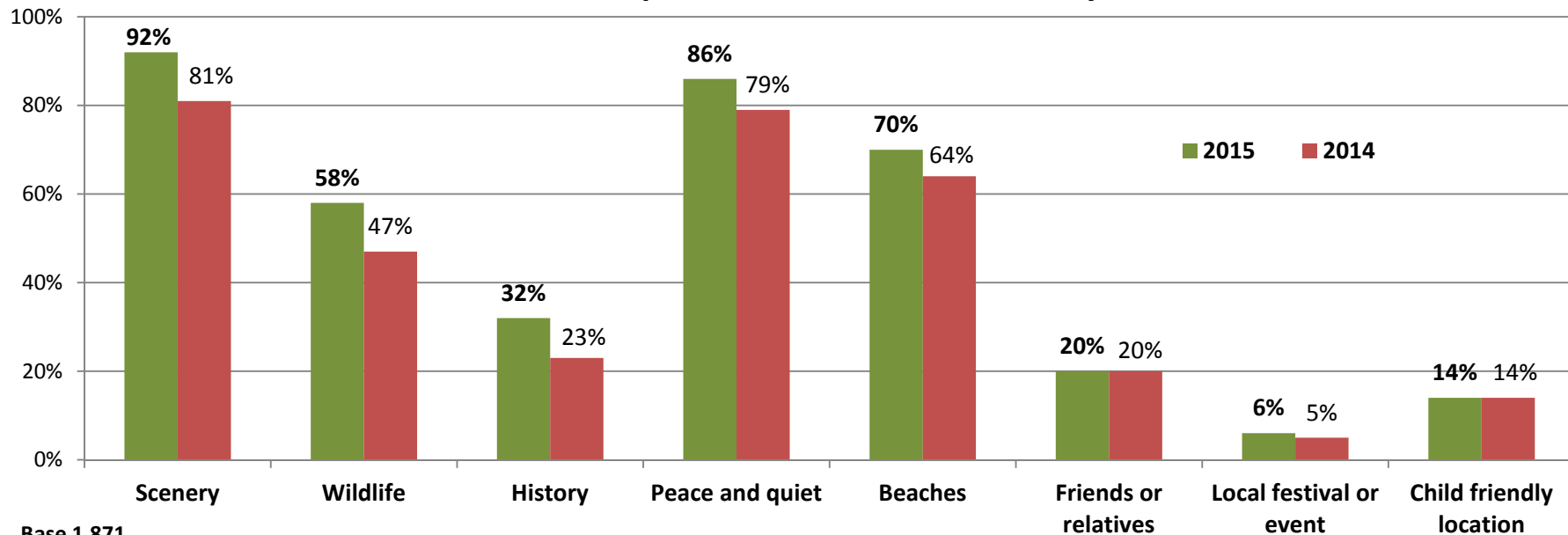
Survey respondents were asked what inspired them to visit the Isles of Scilly.

The scenery (92%) and/or peace and quiet (86%) inspired the largest proportions of respondents to visit the Islands (81% and 79% respectively during 2014) whilst a further 70% were inspired by the beaches (64% 2014).

58% of respondents said the wildlife on the Islands had inspired their visit (47% 2014), 32% said the history of the Isles of Scilly (23% 2014) and 20% said their friends or relatives who live on the Islands (the same proportion as during 2014). A breakdown of the results by segment can be found in the table overleaf. There was little variation in the results according to the Island which respondents had stayed on or by transport used.

Respondents were also asked their reasons for visiting the Islands and to see the full list of responses please see the appendices which accompany this report.

What inspired visit to the Isles of Scilly



94% of first time visitors were inspired to visit the Islands by the scenery and/or a further 87% by the peace and quiet.

	STAYING	DAY	JAN-MAR	APR-JUN	JUL-SEP	OCT-DEC	FIRST TIME	REPEAT	2-4 DAYS	5-7 DAYS	8+ DAYS	MAIN	SECOND	SHORT
Scenery	92%	93%	84%	93%	92%	87%	94%	91%	93%	92%	91%	92%	92%	92%
Wildlife	57%	60%	65%	58%	57%	49%	59%	56%	55%	57%	57%	57%	56%	56%
History	32%	38%	26%	30%	34%	28%	35%	31%	29%	33%	32%	32%	33%	28%
Peace and Quiet	86%	86%	87%	85%	86%	82%	87%	85%	89%	85%	86%	85%	84%	89%
Beaches	70%	68%	74%	67%	72%	68%	68%	70%	68%	69%	71%	70%	70%	69%
Friends or Relatives	19%	23%	23%	20%	19%	21%	16%	21%	20%	21%	15%	17%	23%	21%
Local Festival or Event	6%	6%	6%	7%	5%	12%	6%	6%	7%	6%	5%	5%	6%	7%
Child Friendly Location	13%	20%	19%	11%	14%	17%	13%	13%	15%	11%	14%	12%	15%	13%

 Segment ranking the individual factor the highest

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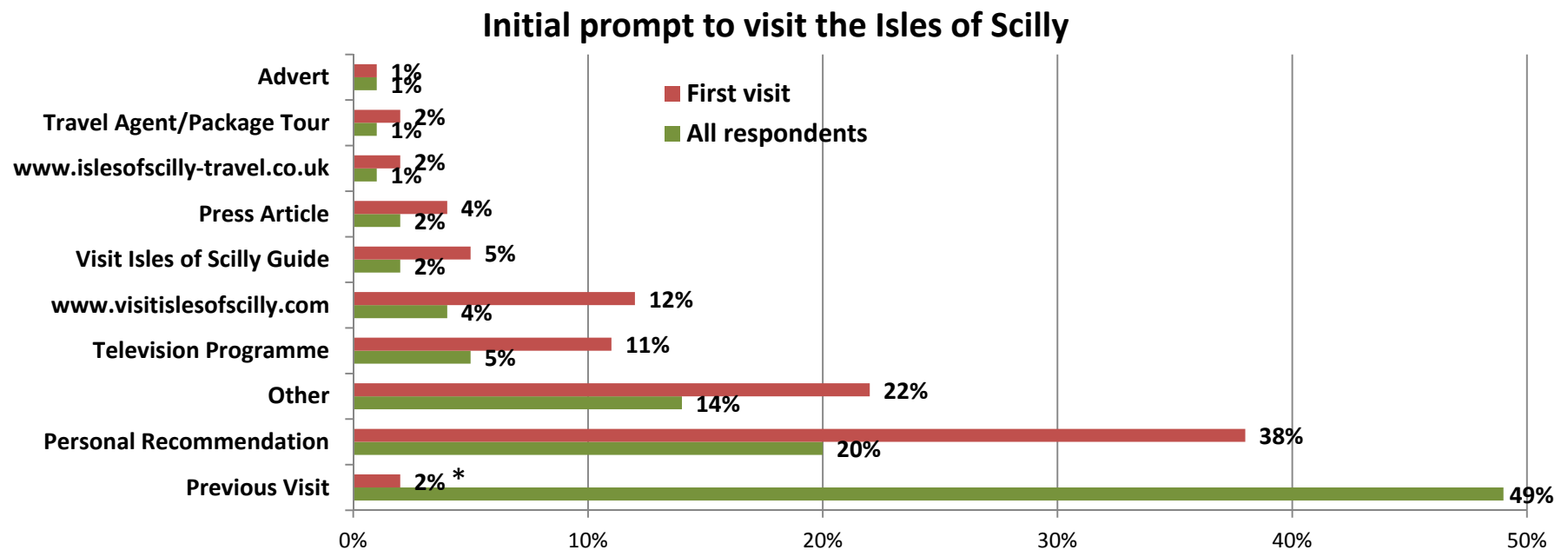
The largest proportion of visitors (49%) had first heard about the Isles of Scilly from a previous visit and/or a further 20% from a personal recommendation.

Respondents were asked what was the initial prompt which made them want to visit the Isles of Scilly.

49% of respondents said from a previous visit and a further 20% from a personal recommendation, including 38% of first time visitors.

12% of first time visitors had initially been prompted to visit by the www.visitislesofscilly.com website and/or a similar proportion (11%) by a television programme.

The results by segment are shown in the table overleaf and to see the list of 'other' information sources used by visitors (14%) please refer to the appendices which accompany his report. There was little variation in the results according to the Island which respondents had stayed on or by transport used.




Base 1,926 * Please note that this percentage is not an error but due to the self-selecting nature of the survey and possible misinterpretation of the question.

69% of repeat visitors were initially prompted to visit by their previous visit to the Islands.

38% of first time visitors were initially prompted to visit by a personal recommendation.

	STAYING	DAY	JAN-MAR	APR-JUN	JUL-SEP	OCT-DEC	FIRST TIME	REPEAT	2-4 DAYS	5-7 DAYS	8+ DAYS	MAIN	SECOND	SHORT
Previous Visit	51%	25%	64%	50%	48%	56%	2%*	69%	35%	51%	59%	53%	53%	42%
Personal Recommendation	20%	21%	17%	20%	21%	14%	38%	13%	20%	20%	21%	21%	21%	18%
Other	14%	16%	6%	14%	15%	14%	22%	11%	19%	14%	12%	12%	14%	19%
Television Programme	5%	13%	3%	6%	5%	5%	11%	3%	4%	6%	4%	5%	4%	5%
www.visitislesofscilly.com	4%	7%	8%	4%	4%	7%	12%	1%	10%	4%	2%	4%	3%	6%
Visit Isles of Scilly Guide	2%	6%	-	2%	2%	1%	5%	1%	4%	2%	1%	1%	2%	4%
Press Article	1%	4%	-	1%	2%	-	4%	1%	3%	1%	1%	1%	1%	2%
www.islesofscilly-travel.co.uk	1%	3%	-	1%	1%	1%	2%	1%	1%	1%	1%	1%	-	2%
Travel Agent/ Package Tour	-	6%	3%	1%	-	2%	2%	-	1%	-	-	-	-	2%
Advert	1%	-	-	1%	1%	-	1%	-	1%	1%	1%	1%	1%	1%

 Segment ranking the individual factor the highest * Please note that this percentage is not an error but due to the self-selecting nature of the survey and possible misinterpretation of the question.

62% and 54% of respondents respectively had used the www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites when planning and booking their visit to the Isles of the Islands.

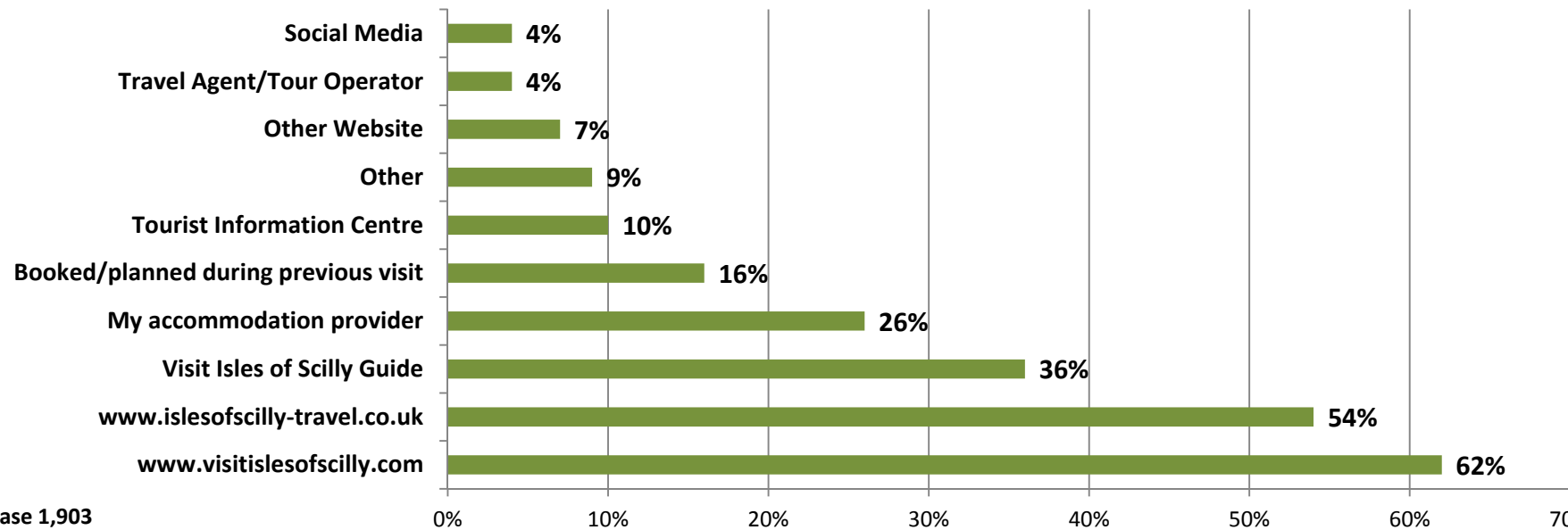
Respondents were asked what information sources they had used when planning and booking their visit to the Isles of Scilly.

62% and 54% of respondents respectively had used the www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites.

A further 36% of respondents had used the Visit Isles of Scilly brochure whilst 26% said they had sourced information from their accommodation provider.

The results by segment are shown in the table overleaf and to see the list of 'other' information sources considered most useful by visitors (9%) please refer to the appendices which accompany this report. There was little variation in the results according to the Island which respondents had stayed on or by transport used.

Sources of information used when planning and booking visit to the Isles of Scilly




Base 1,903

63% and 55% of staying visitors respectively had used the www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites when planning and booking their visit to the Islands.

37% had used the Visit Isles of Scilly Guide.

	STAYING	DAY	JAN-MAR	APR-JUN	JUL-SEP	OCT-DEC	FIRST TIME	REPEAT	2-4 DAYS	5-7 DAYS	8+ DAYS	MAIN	SECOND	SHORT
www.visitislesofscilly.com	63%	58%	65%	63%	62%	68%	63%	63%	60%	64%	63%	62%	66%	64%
www.islesofscilly-travel.co.uk	55%	47%	61%	52%	55%	62%	54%	54%	55%	55%	54%	54%	54%	57%
Visit Isles of Scilly Guide	37%	33%	39%	38%	36%	40%	37%	37%	33%	39%	36%	37%	38%	39%
My accommodation provider	23%	39%	39%	24%	24%	26%	25%	24%	25%	21%	27%	24%	21%	25%
Booked/planned during previous visit	15%	15%	10%	15%	16%	16%	15%*	16%	14%	15%	16%	15%	18%	12%
Tourist Information Centre	10%	7%	29%	9%	10%	7%	10%	10%	10%	9%	12%	11%	10%	9%
Other	8%	8%	6%	8%	9%	6%	8%	9%	8%	8%	8%	8%	9%	8%
Other Website	7%	7%	6%	5%	8%	7%	7%	7%	6%	6%	8%	8%	6%	5%
Travel Agent/Tour Operator	4%	3%	-	5%	4%	4%	4%	4%	4%	5%	3%	4%	5%	4%
Social Media	4%	1%	-	4%	3%	5%	4%	3%	2%	4%	3%	4%	4%	2%

 Segment ranking the individual factor the highest. * Please note that this percentage is not an error but due to the self-selecting nature of the survey and possible misinterpretation of the question.

34% of respondents considered the www.visitislesofscilly.com website most useful to them when planning and booking their visit to the Isles of Scilly.

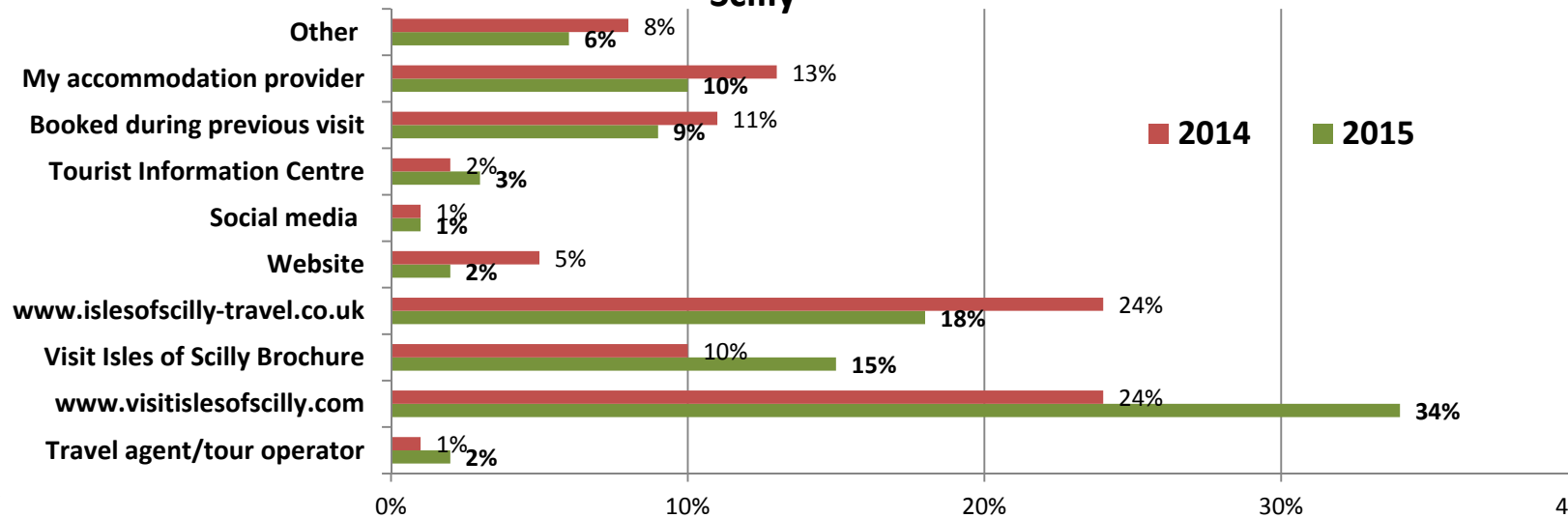
Respondents were asked what information sources they considered most useful when planning and booking their visit to the Isles of Scilly.

34% of respondents said the www.visitislesofscilly.com website was most useful (24% 2014) and 18% said the www.islesofscilly-travel.co.uk website (24% 2014).

A further 15% of respondents said the Visit Isles of Scilly brochure (10% 2014) whilst 10% said their accommodation provider (13% 2014) and a similar proportion (9%) said they had booked during a previous visit to the Islands (11% 2014).

The results by segment are shown in the table overleaf and to see the list of 'other' information sources considered most useful by visitors (6%) please refer to the appendices which accompany this report. There was little variation in the results according to the Island which respondents had stayed on or by transport used.

Most useful information source when planning and booking visit to the Isles of Scilly



Base 1,867

37% and 38% of day and first time visitors respectively considered the www.visitislesofscilly.com website most useful to them when planning and booking their visit to the Islands.

	STAYING	DAY	JAN-MAR	APR-JUN	JUL-SEP	OCT-DEC	FIRST TIME	REPEAT	2-4 DAYS	5-7 DAYS	8+ DAYS	MAIN	SECOND	SHORT
Travel Agent/Tour Operator	2%	2%	-	3%	2%	1%	2%	2%	2%	2%	2%	2%	3%	2%
www.visitislesofscilly.com	35%	37%	29%	33%	36%	34%	38%	34%	37%	35%	34%	35%	35%	35%
Visit Isles of Scilly Guide	15%	12%	10%	17%	14%	15%	13%	16%	15%	17%	13%	15%	16%	16%
www.islesofscilly-travel.co.uk	18%	12%	32%	16%	19%	23%	18%	18%	20%	18%	19%	17%	18%	20%
Other Website	3%	-	3%	2%	2%	2%	3%	2%	2%	2%	3%	3%	2%	2%
Social Media	1%	2%	-	2%	1%	-	1%	1%	-	1%	2%	1%	2%	-
Tourist Information Centre	3%	2%	3%	3%	2%	1%	2%	3%	2%	2%	4%	3%	2%	2%
Booked/planned during previous visit	8%	12%	-	8%	9%	7%	9%	8%	6%	8%	8%	8%	8%	5%
My accommodation provider	9%	15%	19%	10%	9%	11%	9%	10%	13%	8%	9%	9%	7%	13%
Other	6%	6%	3%	6%	7%	5%	5%	7%	3%	7%	7%	7%	7%	4%

 Segment ranking the individual factor the highest

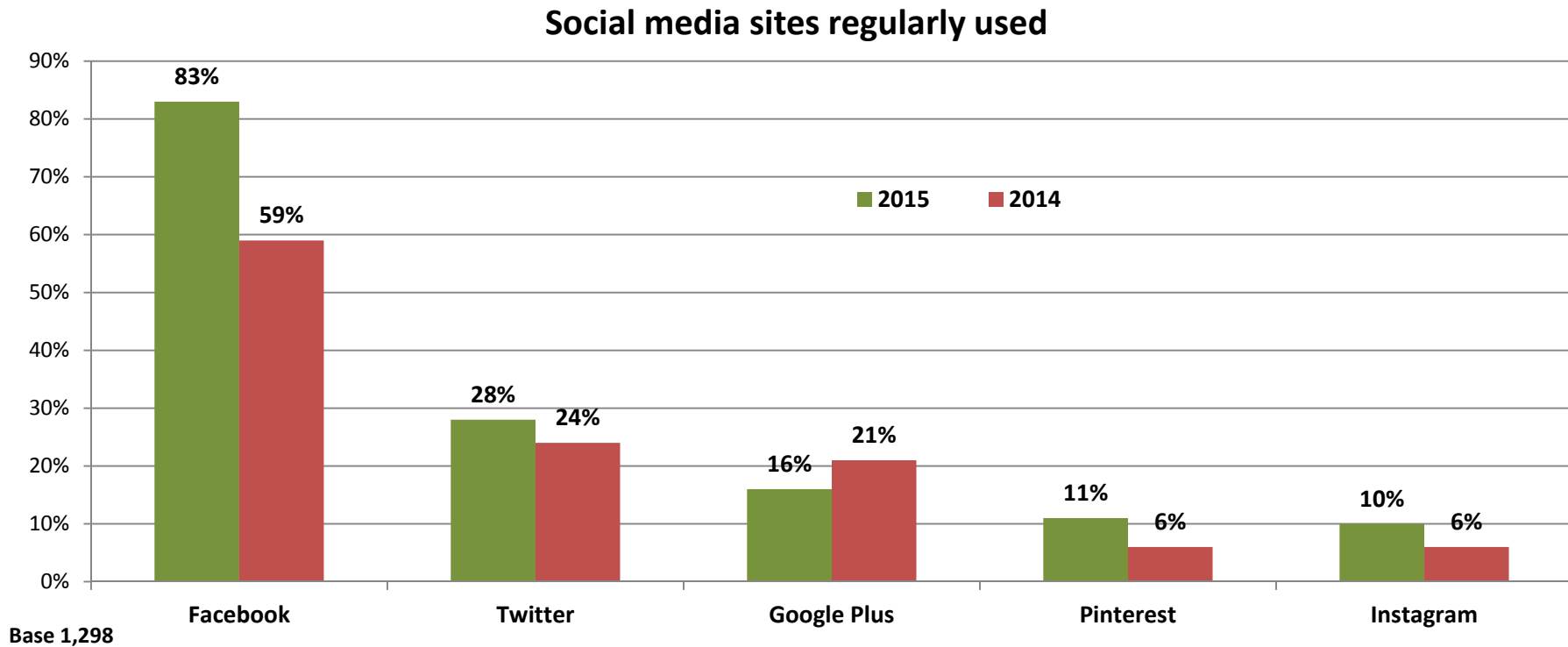
The majority of respondents (83%) used Facebook on a regular basis.

Respondents were asked what social media sites they regularly used.

Amongst those responding to the question, the majority used Facebook on a regular basis, 83%, compared with 59% during 2014.

A further 28% of respondents (24% 2014) used Twitter, 16% Google Plus (21% 2014) and 11% Pinterest (6% 2014) whilst a similar proportion (10%) used Instagram (6% 2014).

There was little variation in the results according to segment.



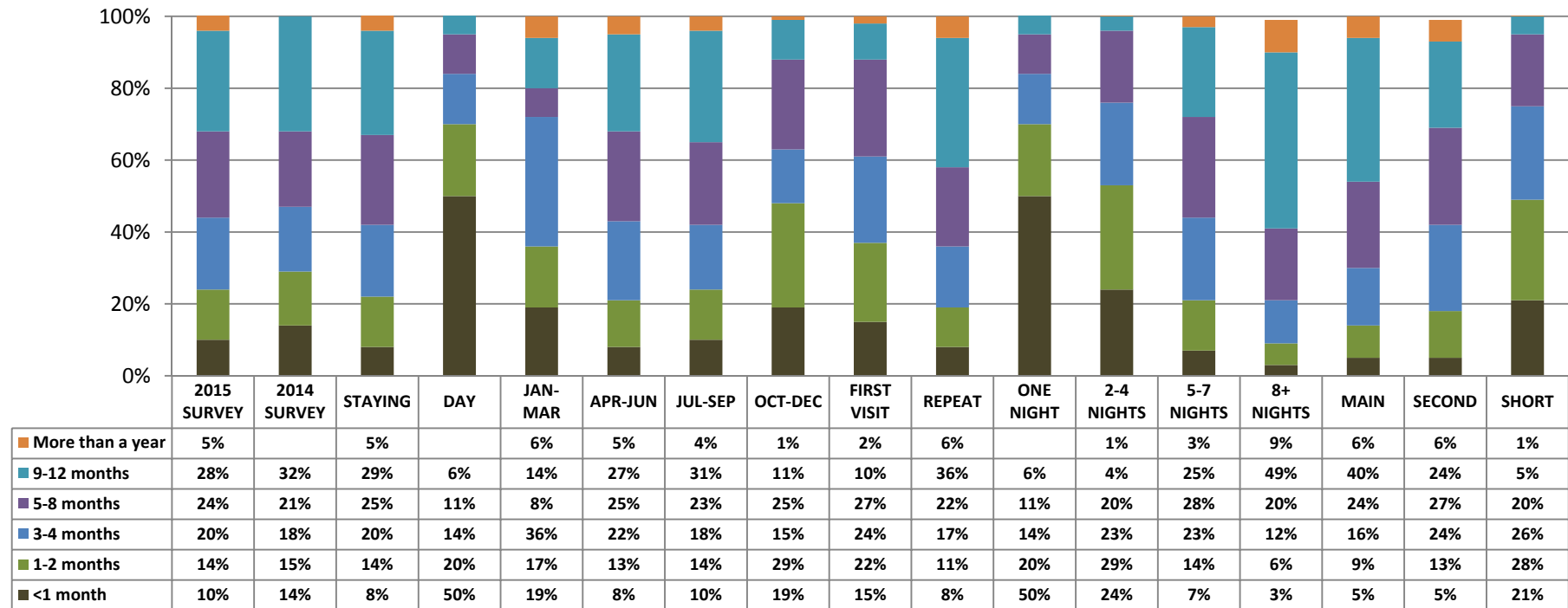
A third of respondents had booked their holiday to the Islands 9 months or more in advance.

28% of respondents had booked their holiday to the Islands 9-12 months in advance (32% 2014) including 49% of respondents staying for 8+ nights, 40% on their main holiday and 40% on a repeat visit. A further 24% had booked 5-8 months before their visit (21% 2014).

20% of respondents had booked 3-4 months in advance (18% 2014), 14% 1-2 months in advance (15% 2014) and just 10% less than one month before their actual holiday to the Islands (14% 2014).

The results by key segments are shown below. There was little variation in the results according to the Island which respondents had stayed on or transport used.

Booking lead times



The Travel Experience

islands
partnership

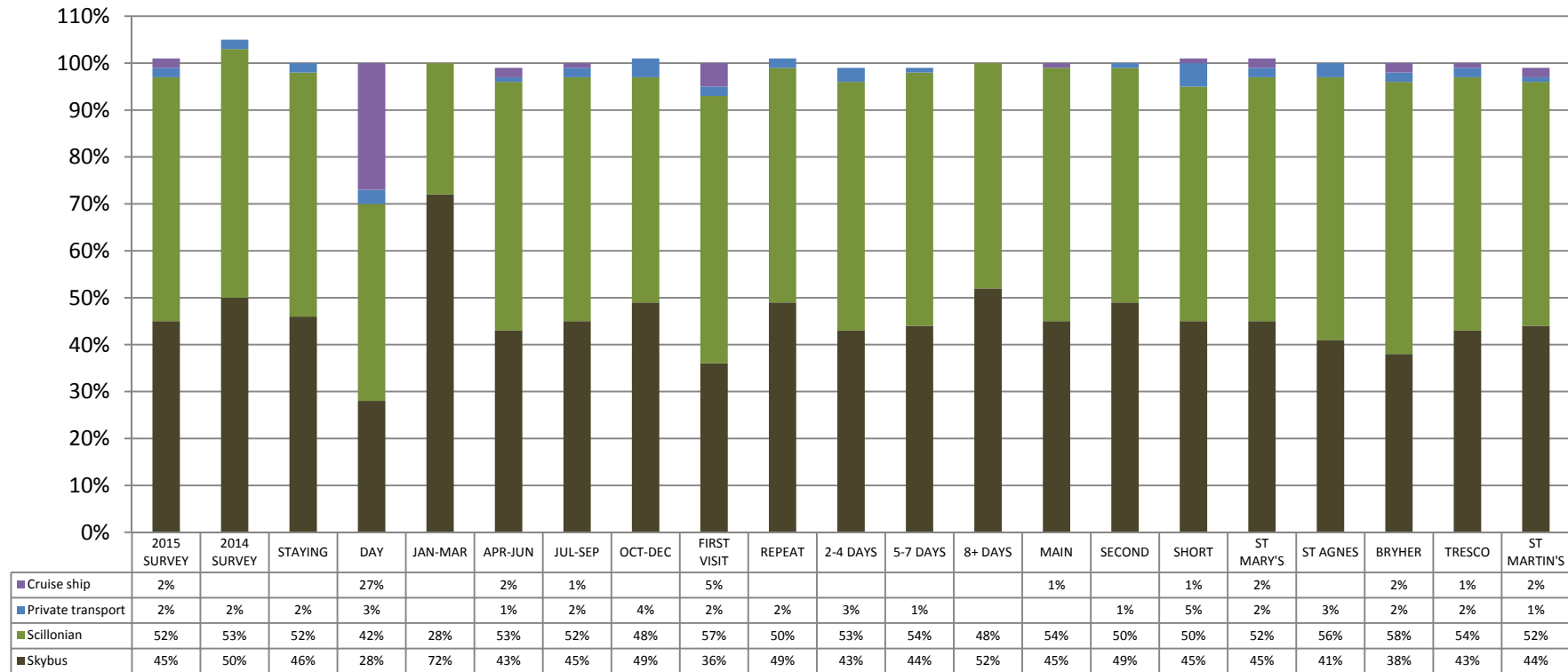


52% of respondents had travelled to the Islands on the Scillonian and a further 45% via the Skybus*

52% of respondents had travelled to the Islands on the Scillonian (53% 2014) and a further 45% via the Skybus (50% 2014)*.

A higher proportion of repeat visitors to the Islands had arrived by Skybus (49%), along with those staying 8+ days (52%), those on a secondary holiday (49%) and those staying on St Marys (45%) and compared with only 28% of day visitors who had done so.

How travelled to the Islands



Base 1,932

* Please note that multiple responses were provided for this question.

Around three quarters of respondents (72%) had reached their connecting flight or boat to the Islands by car.

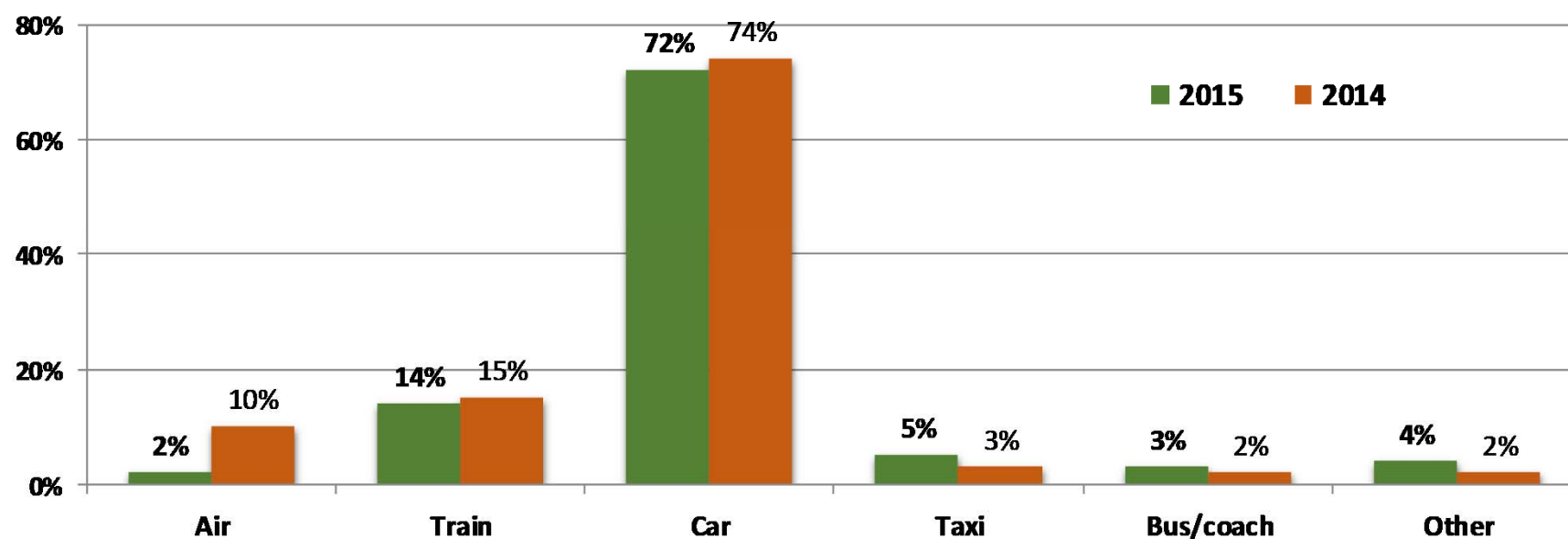
Around three quarters of respondents (72%) had reached their connecting flight or boat to the Islands by car (74% 2014).

A further 14% of respondents had done so by train (15% 2014) and just 2% by air – a decrease of 8% compared with 2014 (10%).

There was little variation in the results according to segment.

4% of respondents said they reached their connecting flight/boat to the Islands via an 'other' method and these can be found in the appendices which accompany this report.

How reached connecting flight/ boat to Islands - all respondents

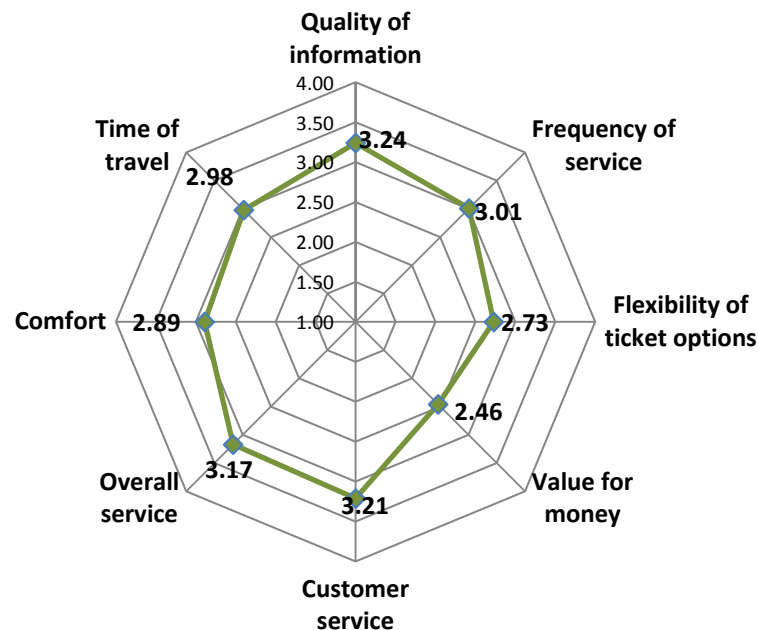


The quality of the travel information, frequency of service, customer service and overall service all received good average scores of between 3.01 and 3.24 out of 4.00.

Visitors were asked to rate their level of satisfaction with a number of factors related to their travel experience on a 1 to 4 scale where '1' was 'poor' and '4' was 'excellent'. This then allowed an average satisfaction score for each indicator to be calculated out of a maximum of 4.00. The results for all respondents are shown in the charts below.

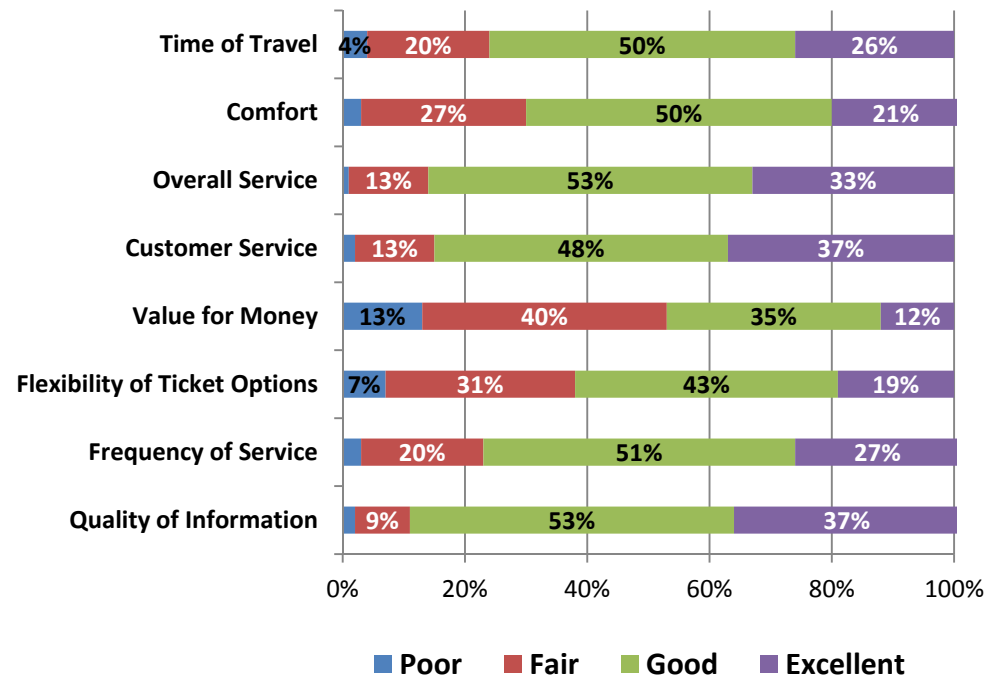
The quality of the travel information (3.24), frequency of service (3.01), customer service (3.21) and overall service (3.17) all received good average scores of between 3.01 and 3.24. The flexibility of their ticket options, value for money of their travel experience, comfort of travel and time of travel all received lower average scores of between 2.46 and 2.98 out of 4.00. The highest level of satisfaction was with the quality of travel information (3.24) and lowest for value for money of travel to the Islands (2.46). The results by segment and compared with 2014 are shown in the table overleaf. Overall, satisfaction levels amongst visitors for their travel experience were lower than during 2014.

Satisfaction with travel experience




Base 1,597-1,680

Satisfaction with travel experience



On the whole, satisfaction levels with the travel experience were higher amongst day visitors, those visiting the Islands during January to March, amongst first time visitors, those staying 5-7 nights, those on their main holiday of the year, those staying on St. Agnes and those travelling to the Islands via the Skybus.

Mean satisfaction score out of a max. of 4.00	Quality of information	Frequency of service	Flexibility of ticket options	Value for money	Customer service	Service overall	Comfort	Time of travel
2015 SURVEY	3.24	3.01	2.73	2.46	3.21	3.17	2.89	2.98
2014 SURVEY	3.39	3.11	2.85	2.53	3.29	3.23	-	-
STAYING	3.24	3.00	2.71	2.44	3.20	3.16	2.88	2.97
DAY	3.31	3.18	2.99	2.89	3.28	3.28	3.00	3.14
JAN-MAR	3.48	3.07	2.97	2.43	3.53	3.47	3.23	3.20
APR-JUN	3.20	2.98	2.71	2.48	3.18	3.16	2.87	3.01
JUL-SEP	3.25	3.02	2.73	2.45	3.21	3.16	2.88	2.95
OCT-DEC	3.36	3.08	2.70	2.43	3.31	3.27	2.95	3.03
FIRST TIME	3.24	2.96	2.79	2.63	3.23	3.18	2.96	2.99
REPEAT	3.24	3.03	2.70	2.39	3.20	3.16	2.86	2.97
2-4 NIGHTS	3.25	2.92	2.66	2.50	3.18	3.13	2.89	2.94
5-7 NIGHTS	3.25	3.04	2.77	2.50	3.22	3.19	2.89	2.99
8+ NIGHTS	3.22	2.97	2.62	2.30	3.18	3.12	2.86	2.93
MAIN	3.27	3.05	2.76	2.46	3.24	3.19	2.91	2.99
SECOND	3.19	2.96	2.64	2.36	3.15	3.14	2.84	2.95
SHORT	3.22	2.91	2.70	2.48	3.16	3.13	2.87	2.95
ST MARY'S	3.26	3.02	2.73	2.47	3.22	3.18	2.90	2.99
ST AGNES	3.17	3.02	2.67	2.57	3.14	3.15	2.85	2.94
BRYHER	3.17	2.98	2.59	2.46	3.09	3.05	2.79	2.87
TRESCO	3.26	3.06	2.69	2.47	3.22	3.19	2.86	2.95
ST MARTIN'S	3.19	3.03	2.64	2.44	3.12	3.11	2.86	2.98
SKYBUS	3.31	3.19	2.78	2.28	3.32	3.26	2.95	3.20
SCILLONIAN	3.19	2.85	2.67	2.59	3.12	3.09	2.82	2.78
PRIVATE	3.11	3.00	2.86	2.95	3.06	3.19	3.05	3.10

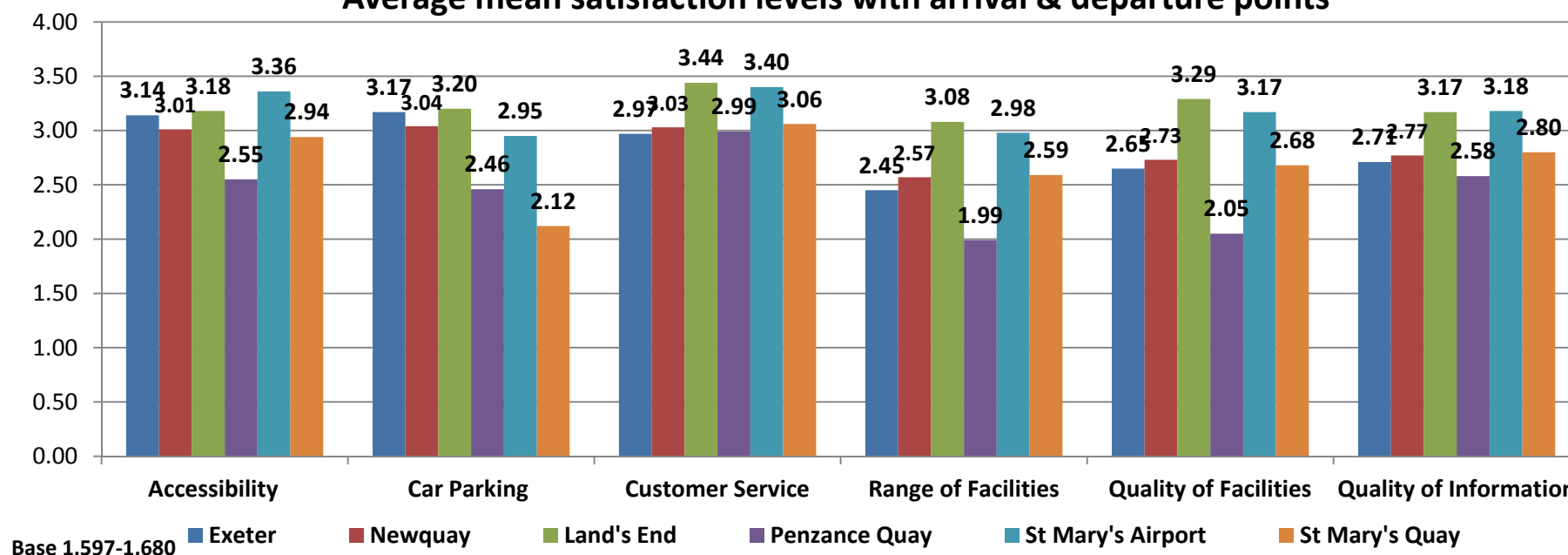
 Highest average mean score for indicator within each segment type

On the whole Land's End and St Mary's Airport received the highest levels of satisfaction amongst visitors and Penzance Quay the lowest.

Visitors were also asked to rate their level of satisfaction with a number of factors related to their arrival and departure points to and from the Islands including Exeter, Newquay, Land's End, Penzance Quay, St. Mary's Airport and St. Mary's Quay. Once again, a 1 to 4 scale was used where '1' was 'poor' and '4' was 'excellent'. This then allowed an average satisfaction score for each indicator to be calculated out of a maximum of 4.00.

Visitors' satisfaction levels in terms of accessibility were highest at St Mary's Airport (3.36) and lowest at Penzance Quay (2.55). In terms of car parking, they were highest at Land's End (3.20) and lowest at St Mary's Quay (2.12). Visitors' satisfaction levels in terms of customer service were highest at Land's End (3.44) and lowest at Exeter (2.97) and in terms of the range of facilities were highest at Land's End (3.08) and lowest at Penzance Quay (1.99). Visitors' satisfaction levels in terms of the quality of facilities were also highest at Land's End (3.29) and lowest again at Penzance Quay (2.05) and finally, in terms of the quality of information, they were highest at St Mary's Airport (3.18) and lowest at Penzance Quay (2.58).

Average mean satisfaction levels with arrival & departure points



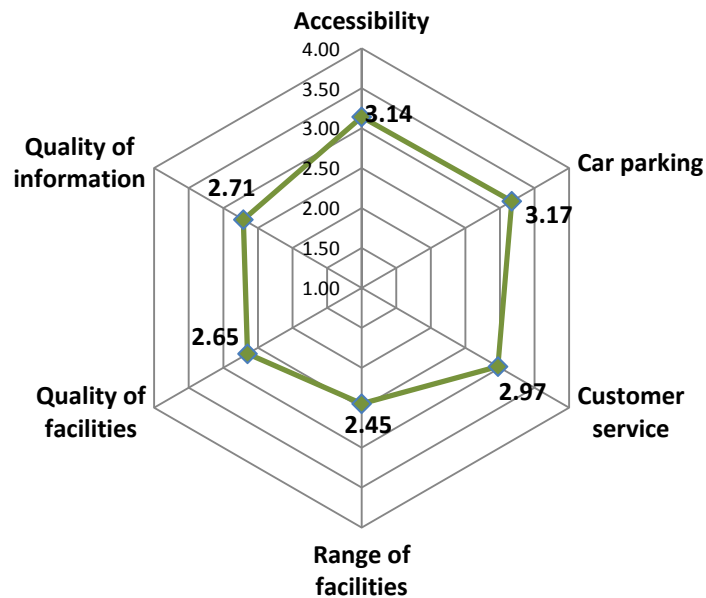
A number of respondents provided a comment about their arrival/departure points and these can be found in the appendices which accompany this report.

Whilst accessibility and car parking at Exeter received good average scores all other indicators received average scores – the lowest being for the range of facilities.

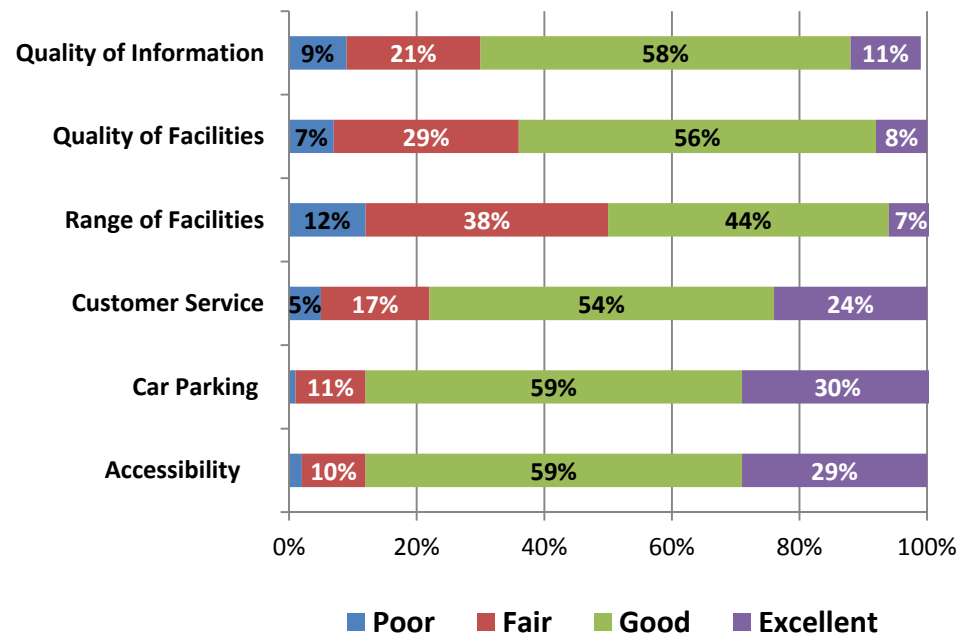
Whilst accessibility and car parking at Exeter received good average scores of 3.14 and 3.17 respectively all other indicators received average scores of 2.97 or lower – the lowest being for the range of facilities at 2.45 out of 4.00 with half of all respondents rating this aspect as ‘poor’ or ‘fair’.

There was little variation in the results according to segment.

Satisfaction with arrival & departure points - EXETER



Satisfaction with arrival & departure points - EXETER

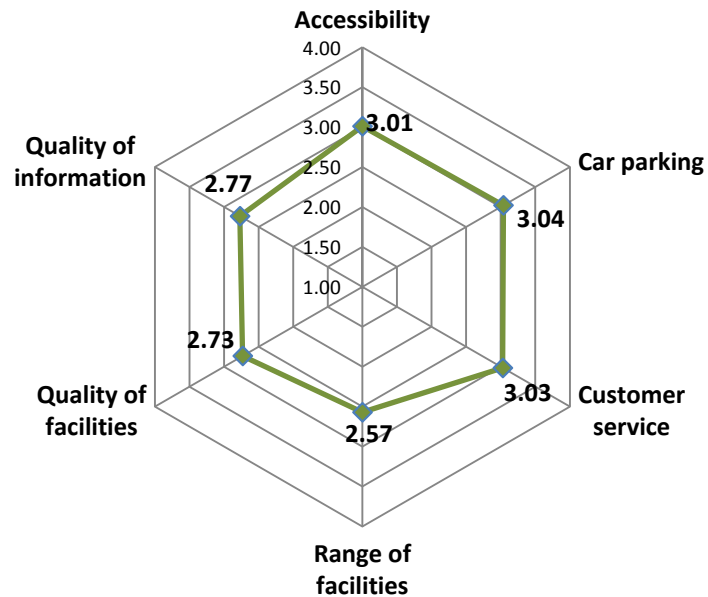


At Newquay, three indicators received good average scores (accessibility, car parking and customer services). All other indicators received average scores – the lowest being for the range of facilities.

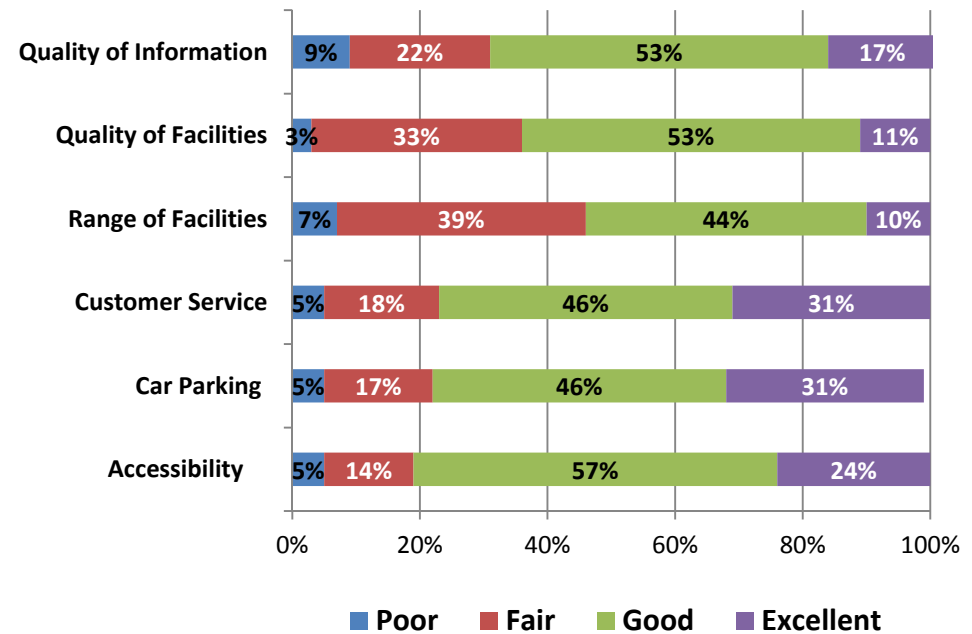
At Newquay, three indicators received good average scores; 3.01 for accessibility, 3.04 for car parking and 3.03 for customer services. All other indicators received average scores of 2.77 or lower – the lowest being for the range of facilities at 2.57 out of 4.00 with 46% of respondents rating this aspect as 'poor' or 'very poor'.

There was little variation in the results according to segment.

Satisfaction with arrival & departure points - NEWQUAY



Satisfaction with arrival & departure points - NEWQUAY

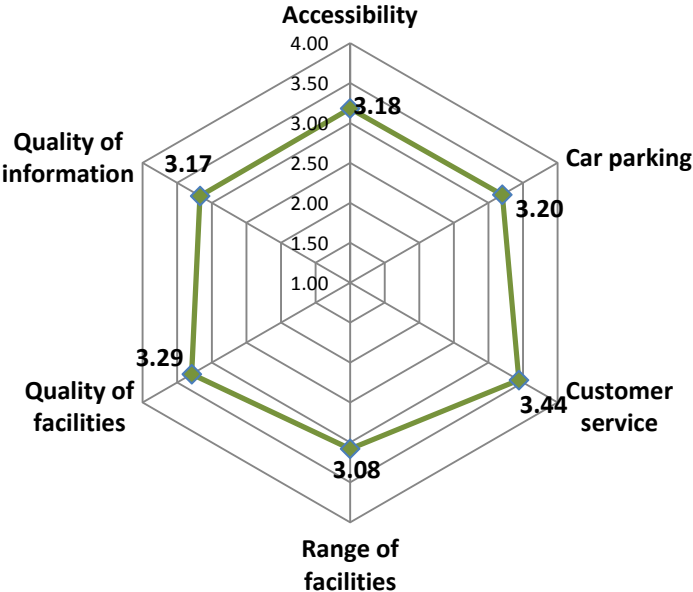


All six indicators for Land's End received good average scores of 3.08 or higher – the highest being for customer service (3.44) and the lowest for the range of facilities at 3.08 out of 4.00.

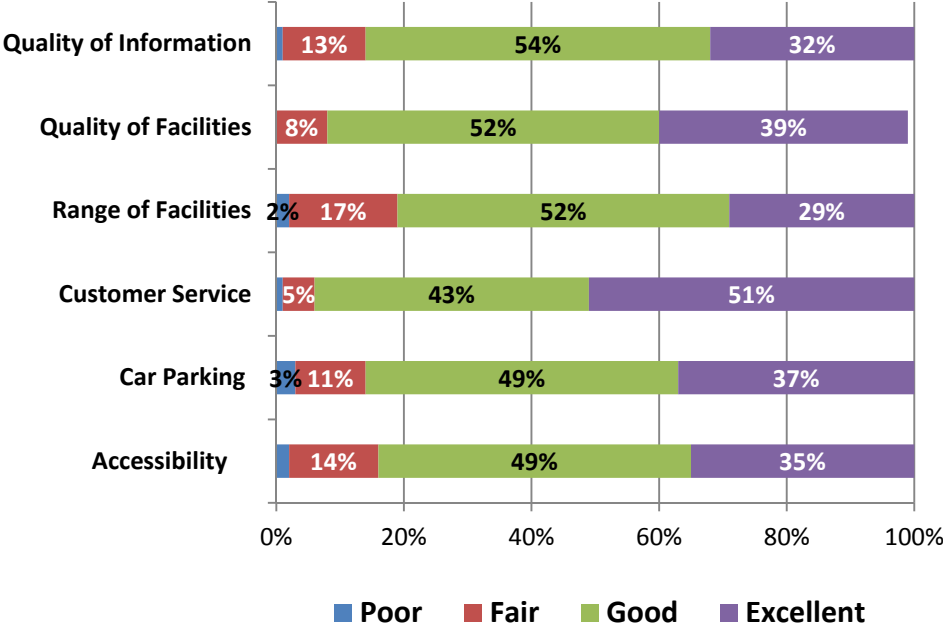
All six indicators for Land's End received good average scores of 3.08 or higher – the highest being for customer service (3.44) and the lowest for the range of facilities at 3.08 out of 4.00. Between 81% and 94% of respondents rated each of the indicators as 'good' or 'very good'.

There was little variation in the results according to segment.

Satisfaction with arrival & departure points – LAND'S END



Satisfaction with arrival & departure points – LAND'S END

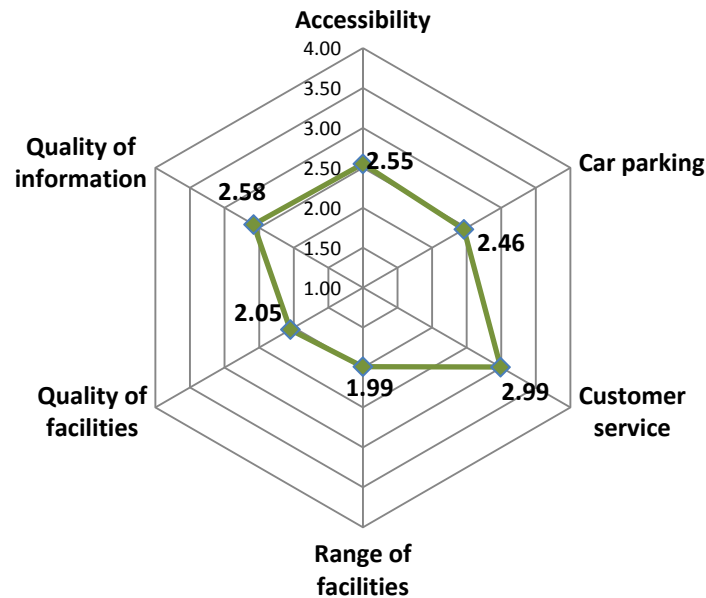


All six indicators for Penzance Quay received lower average scores of 2.99 or lower – the lowest being for the range of facilities at 1.99 out of 4.00.

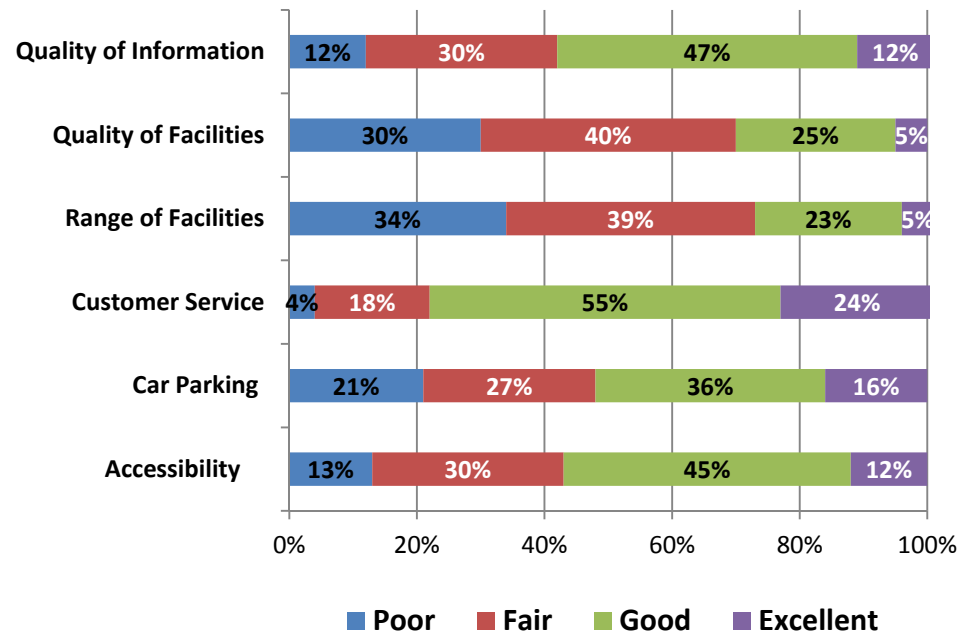
All six indicators for Penzance Quay received lower average scores of 2.99 or lower – the lowest being for the range of facilities at 1.99 out of 4.00 with 73% of respondents rating this indicator as ‘poor’ or ‘very poor’.

There was little variation in the results according to segment.

Satisfaction with arrival & departure points – PENZANCE QUAY



Satisfaction with arrival & departure points – PENZANCE QUAY

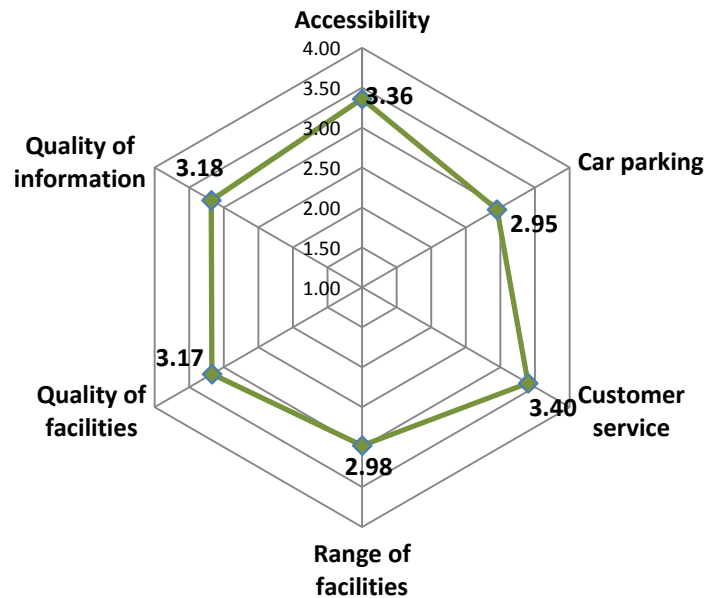


At St Mary's Airport four indicators received high average scores (accessibility, customer service, quality of facilities and quality of information). The lowest score was once again for the range of facilities.

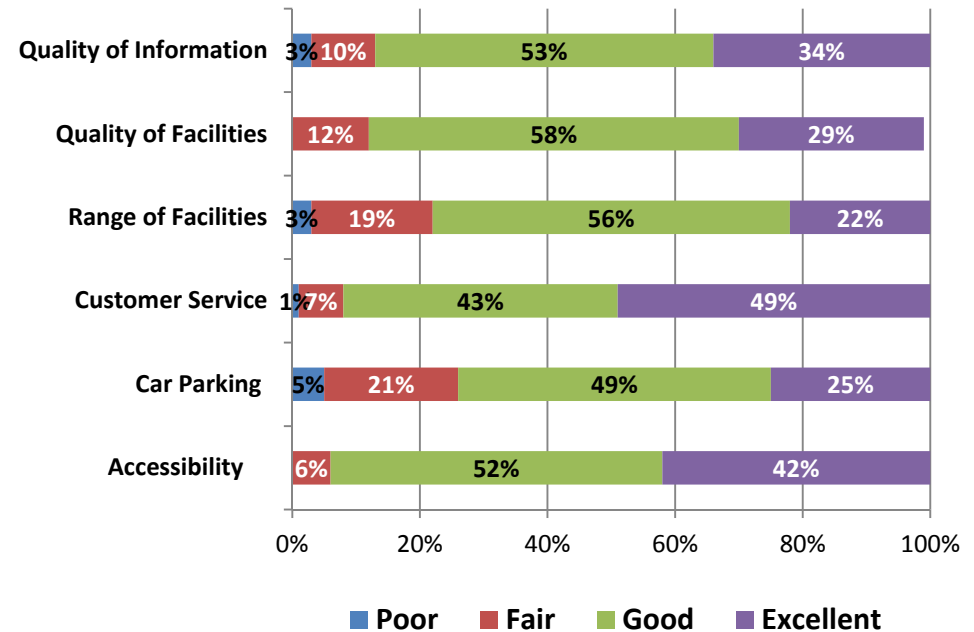
At St Mary's Airport four indicators received high average scores of 3.17 or higher including accessibility (3.36), customer service (3.40), quality of facilities (3.17) and quality of information (3.18). The lowest score was once again for the range of facilities at 2.98 out of 4.00 with 22% of respondents rating this indicator as 'poor' or 'very poor'.

There was little variation in the results according to segment.

Satisfaction with arrival & departure points – ST MARY'S AIRPORT



Satisfaction with arrival & departure points – ST MARY'S AIRPORT



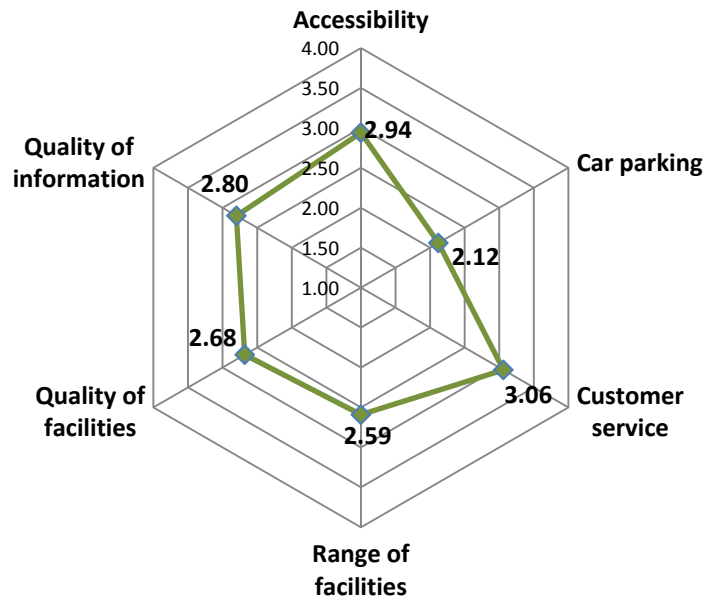
Customer service at St Mary's Quay received a high average score.

All other aspects at St Mary's Quay received lower average scores – the lowest being for car parking.

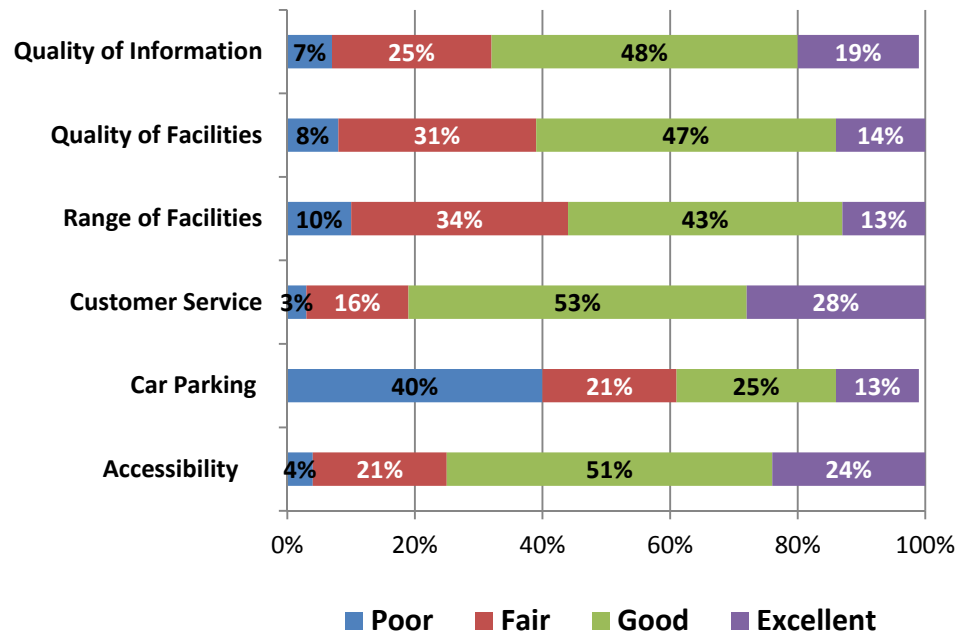
Customer service at St Mary's Quay received a high average score of 3.06 out of 4.00. All other aspects received lower average scores of between 2.12 and 2.94. Car parking at the quay was rated the lowest (2.12) with 61% of respondents rating this indicator as 'poor' or 'very poor'.

There was little variation in the results according to segment.

Satisfaction with arrival & departure points – ST MARY'S QUAY



Satisfaction with arrival & departure points – ST MARY'S QUAY



Visitors' Opinions

islands
partnership



Introduction

The 2015 Isles of Scilly Online Visitor Survey obtained visitors' satisfaction levels with a wide range of factors or indicators which together comprise the 'visitor experience'. Each factor, or indicator, was rated on a range of '1' to '4' scale where '1' = 'poor' (or the most negative response), '2' = 'fair', '3' = 'good', '4' = 'excellent' (or the most positive response), allowing a satisfaction 'score' (out of a maximum of four) to be calculated.

The areas explored in terms of satisfaction were:

- Accommodation
- Activities
- Travel & Transport
- Places to Eat & Drink
- Evening Entertainment
- Shopping
- Ease of finding way around
- Tourist Information Centre
- Public toilets
- Cleanliness of streets
- Overall impression of the Isles of Scilly

On the whole, visitor satisfaction levels with their Island experience were very high.

Satisfaction levels were highest for the general atmosphere and sense of welcome and lowest for the quality and range of evening entertainment.

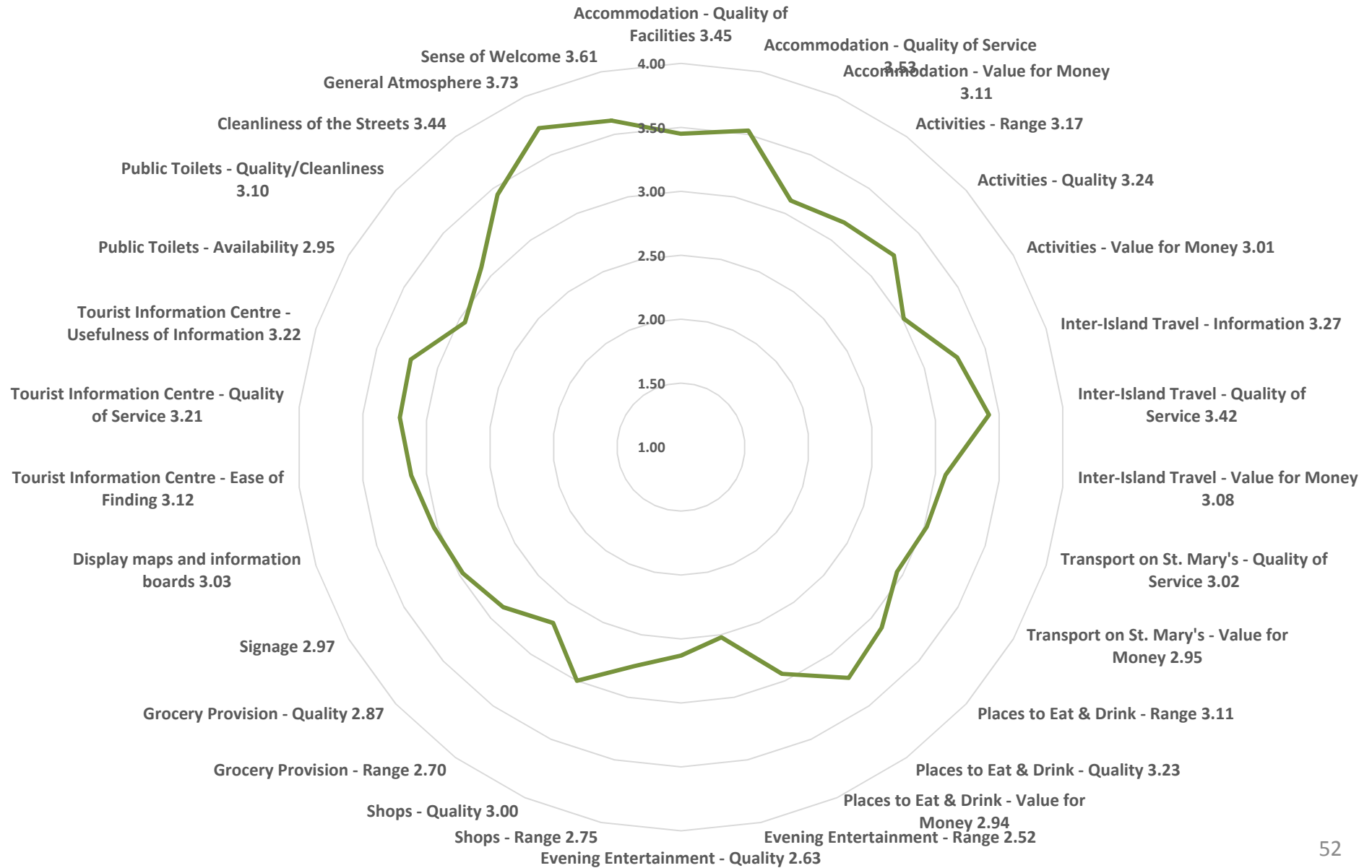
#	Indicator	Mean score	Ranking	#	Indicator	Mean score	Ranking
1	Quality of facilities at accommodation	3.45	4	17	Range of shops	2.75	27
2	Quality of service at accommodation	3.53	3	18	Quality of shops	3.00	21
3	Value for money of accommodation	3.11	14	19	Range of grocery provision shops	2.70	28
4	Range of activities	3.17	12	20	Quality of grocery provision shops	2.87	26
5	Quality of activities	3.24	8	21	Signage	2.97	22
6	Value for money of activities	3.01	20	22	Display maps & information boards	3.03	18
7	Information regarding inter-island transport	3.27	7	23	Ease of finding TIC	3.12	13
8	Quality of service regarding inter-island transport	3.42	6	24	Quality of service at TIC	3.21	11
9	Value for money of inter-island transport	3.08	17	25	Usefulness of information provided at TIC	3.22	10
10	Quality of service of transport on St. Mary's	3.02	19	26	Availability of public toilets	2.95	24
11	Value for money of transport on St. Mary's	2.95	23	27	Cleanliness of public toilets	3.10	16
12	Range of places to eat & drink	3.11	15	28	Cleanliness of the streets	3.44	5
13	Quality of places to eat & drink	3.23	9	29	General atmosphere	3.73	1
14	Value for money of places to eat & drink	2.94	25	30	Sense of welcome	3.61	2
15	Range of evening entertainment	2.52	29				
16	Quality of evening entertainment	2.63	30				

Visitor satisfaction levels with their Island experience were, on the whole, very high.

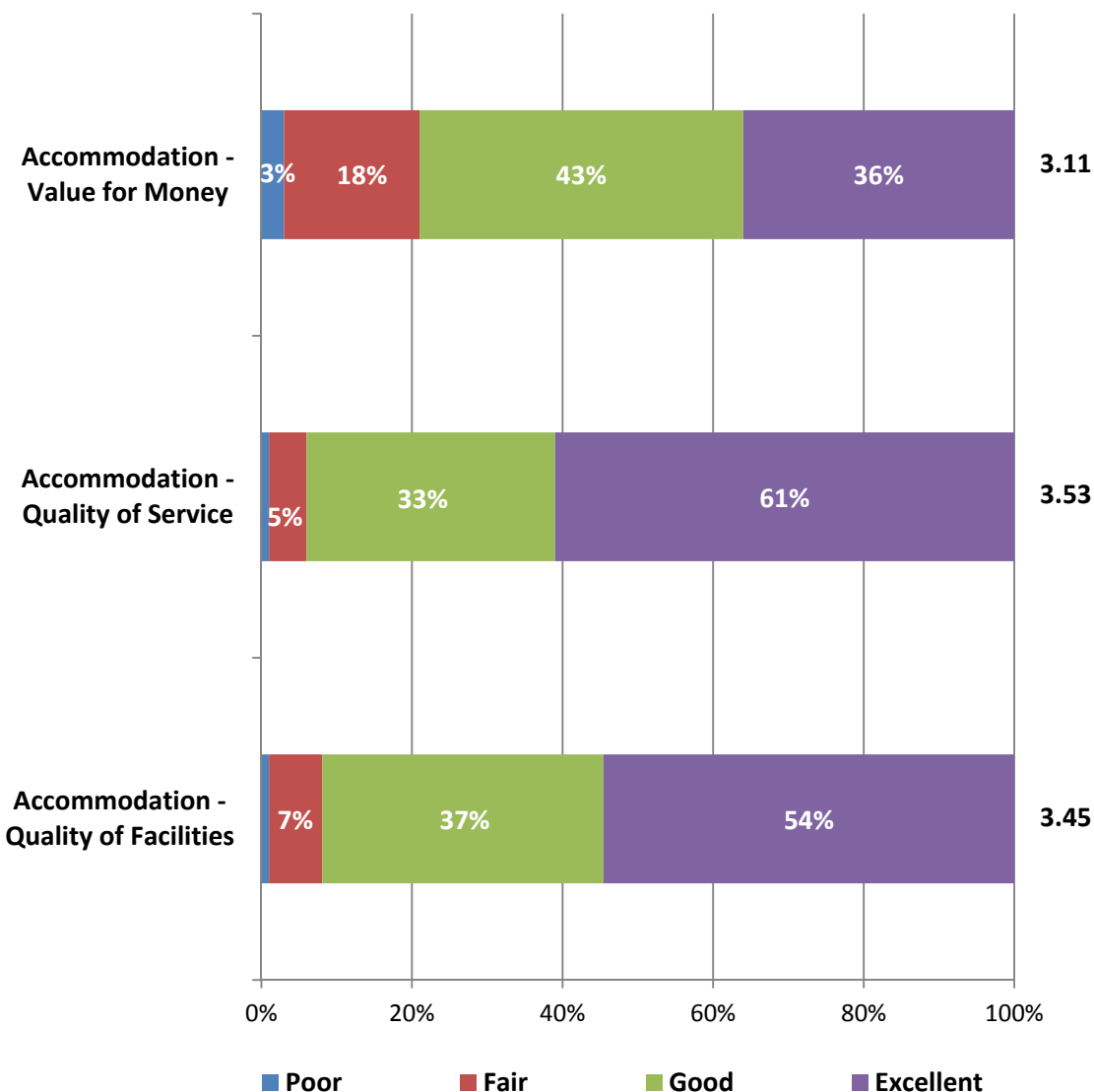
The highest levels of satisfaction were for the general atmosphere (3.73) and sense of welcome (3.61). The lowest levels of satisfaction were with the quality and range of evening entertainment (2.62 and 2.52 out of 4.00 respectively).

The radar chart overleaf displays the mean average scores for each indicator in a visual format.

The areas for attention are signage, value for money of transport on St. Mary's, availability of public toilets, value for money of places to eat & drink, quality and range of grocery provision shops, range of other shops and evening entertainment.



The mean satisfaction scores calculated for all aspects of accommodation on the Islands were high. Scores ranged from 3.11 for value for money to 3.53 for the quality of service and 3.45 for the quality of the facilities.



91% of visitors rated the quality of the facilities at their accommodation on the Islands as 'good' or 'excellent', as did 94% for the quality of service at their accommodation and 79% in terms of value for money.


18% of visitors rated the value for money of their accommodation on the Islands as 'fair' and 3% as 'poor'.

The mean satisfaction scores calculated for all aspects of accommodation on the Islands were high. Scores ranged from 3.11 out of 4.00 for value for money to 3.53 for the quality of service (third highest ranked indicator of all those explored during the 2015 survey) and 3.45 for the quality of the facilities (fourth highest ranked indicator of 2015).

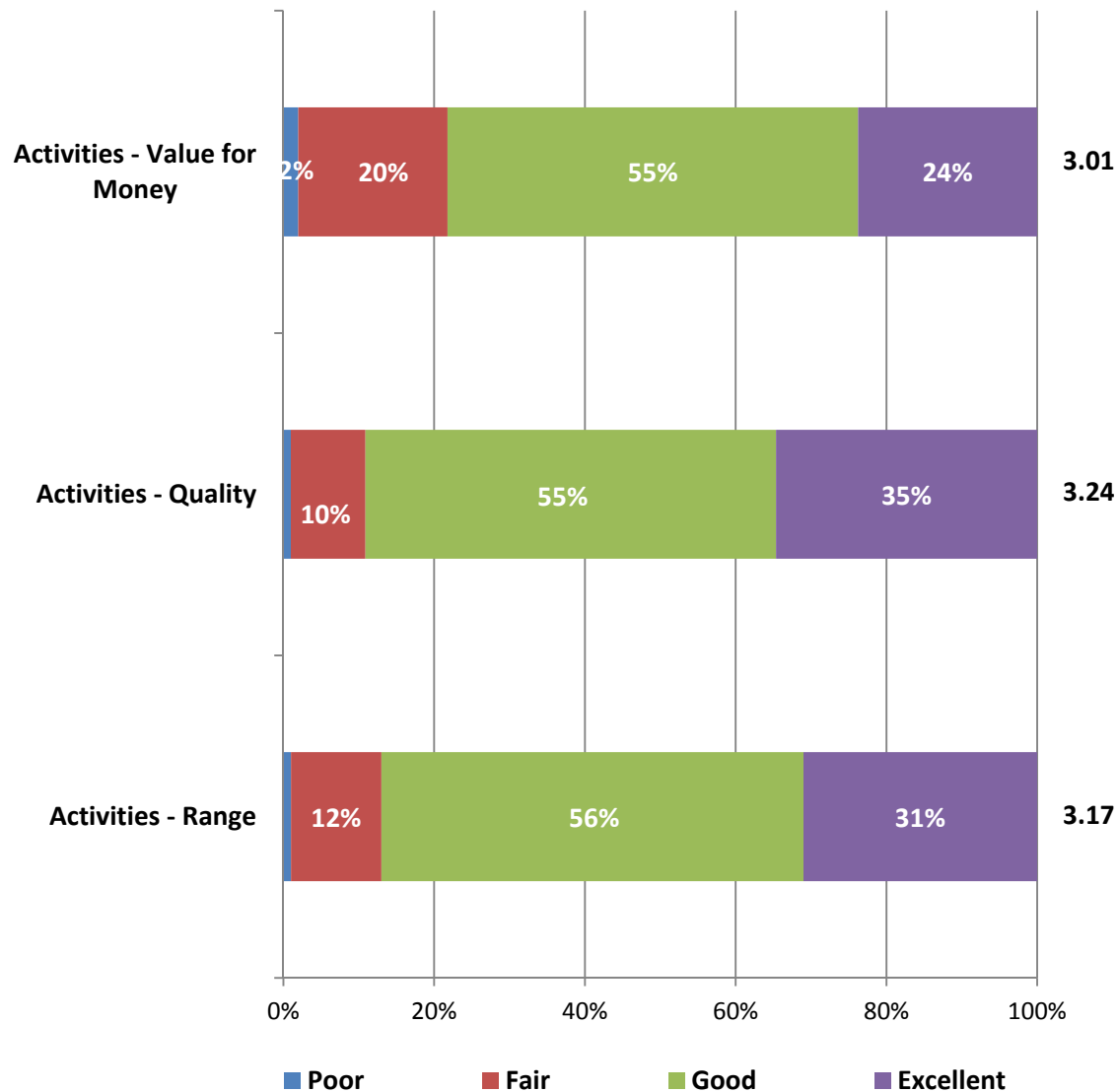
The mean satisfaction scores for each of the segments are shown in the table overleaf.

On the whole, levels of satisfaction with the different aspects of accommodation were highest amongst January to March visitors, those on a repeat visit, those on their main holiday of the year, those staying on St. Mary's and those who had travelled by Skybus to the Islands.

Accommodation - mean satisfaction scores (out of a max. of 4.00)	Quality of Facilities	Quality of Service	Value for Money
2015 SURVEY	3.45	3.53	3.11
STAYING	3.46	3.54	3.12
DAY	-	-	-
JAN-MAR	3.65	3.65	3.13
APR-JUN	3.44	3.54	3.10
JUL-SEP	3.44	3.52	3.11
OCT-DEC	3.58	3.58	3.22
FIRST TIME	3.41	3.54	3.19
REPEAT	3.47	3.53	3.08
2-4 NIGHTS	3.45	3.58	3.14
5-7 NIGHTS	3.46	3.55	3.15
8+ NIGHTS	3.46	3.50	3.06
MAIN	3.48	3.55	3.14
SECOND	3.45	3.51	3.06
SHORT	3.41	3.54	3.11
ST MARY'S	3.45	3.52	3.10
ST AGNES	3.37	3.50	3.11
BRYHER	3.42	3.51	3.10
TRESCO	3.33	3.47	3.07
ST MARTIN'S	3.39	3.48	3.15
SKYBUS	3.50	3.54	3.11
SCILLONIAN	3.41	3.53	3.11
PRIVATE	3.35	3.40	3.05

 Highest average mean score for indicator within each segment type

The mean satisfaction scores calculated for all aspects of activities on the Islands were high. Scores ranged from 3.01 out of 4.00 for value for money to 3.24 for the quality of the activities and 3.17 for the range of activities.



91% of visitors rated the range of activities on the Islands as 'good' or 'excellent', as did 90% for the quality of the activities and 79% in terms of value for money.

20% of visitors rated the value for money of the activities on the Islands as 'fair' and 2% as 'poor'.

The mean satisfaction scores calculated for all aspects of activities on the Islands were high. Scores ranged from 3.01 out of 4.00 for value for money to 3.24 for the quality of the activities (eight highest ranked indicator of all those explored during the 2015 survey) and 3.17 for the range of activities.

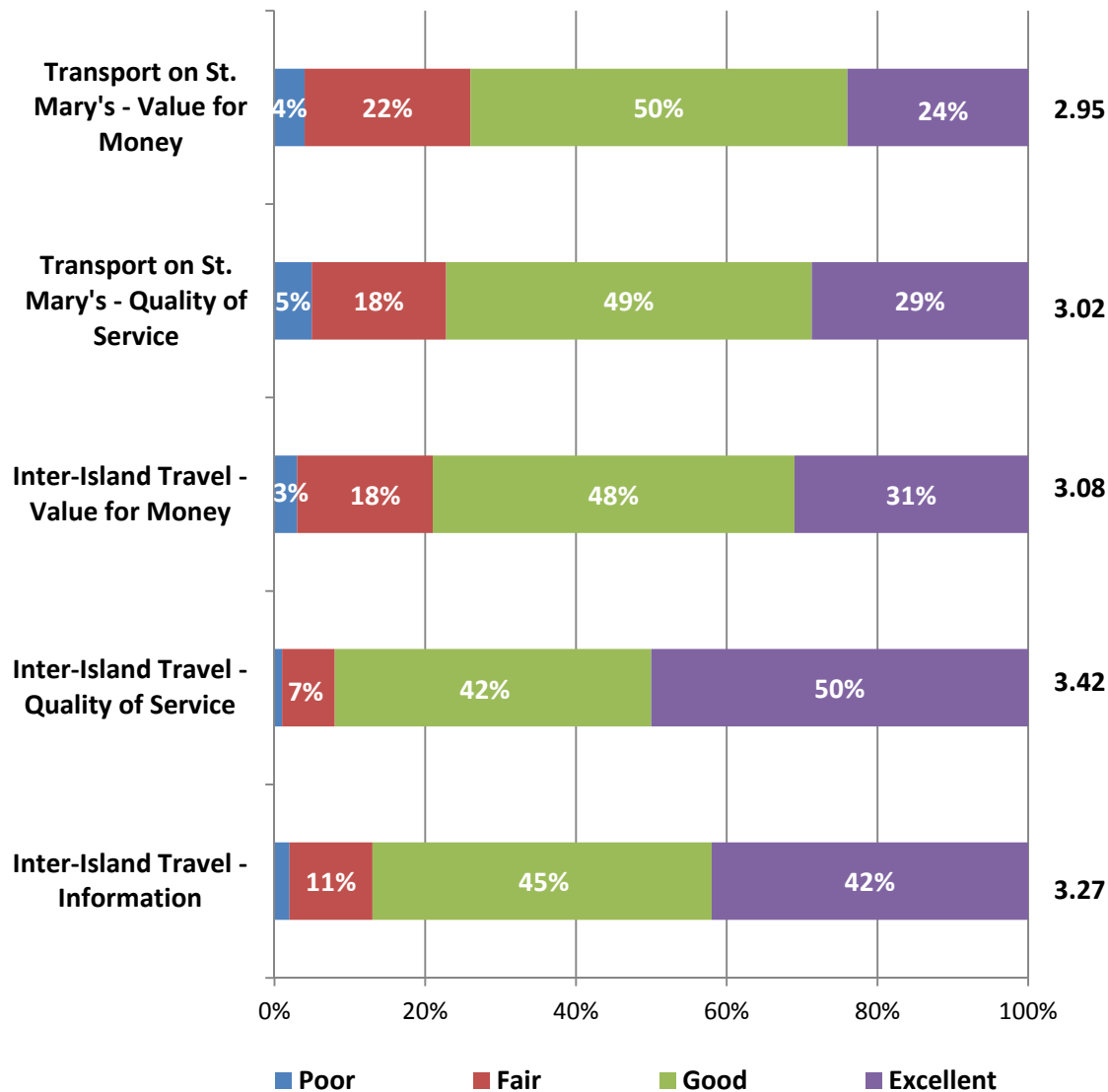
The mean satisfaction scores for each of the segments are shown in the table overleaf.

On the whole, levels of satisfaction with the different aspects of activities on the Islands were highest amongst staying visitors, July to September visitors, those on a repeat visit, those staying 8+ nights, those on their main holiday of the year, those staying on St. Agnes and those who had travelled on the Scillonian.

Activities - mean satisfaction scores (out of a max. of 4.00)	Range	Quality	Value for money
2015 SURVEY	3.17	3.24	3.01
STAYING	3.17	3.24	3.02
DAY	3.11	3.15	2.98
JAN-MAR	2.86	3.30	2.96
APR-JUN	3.18	3.24	3.00
JUL-SEP	3.18	3.24	3.03
OCT-DEC	3.03	3.16	2.98
FIRST TIME	3.12	3.21	3.04
REPEAT	3.19	3.25	3.00
2-4 NIGHTS	3.08	3.17	2.95
5-7 NIGHTS	3.18	3.25	3.04
8+ NIGHTS	3.21	3.27	3.01
MAIN	3.23	3.30	3.05
SECOND	3.11	3.19	2.99
SHORT	3.08	3.15	2.93
ST MARY'S	3.18	3.24	3.01
ST AGNES	3.28	3.29	3.02
BRYHER	3.19	3.21	3.04
TRESCO	3.14	3.16	2.99
ST MARTIN'S	3.14	3.15	3.02
SKYBUS	3.14	3.22	3.01
SCILLONIAN	3.19	3.26	3.02
PRIVATE	3.19	3.10	2.95

 Highest average mean score for indicator within each segment type

With the exception of the value for money of transport on St. Mary's the mean satisfaction scores calculated for all aspects of travel within and around the Islands were high.



Base 1,309-1,638

79% or more of visitors rated the various aspects of inter-island travel on the Islands as 'good' or 'excellent', including 87% for information, 92% for the quality of the service and 79% in terms of value for money.

In terms of transport on St. Mary's, 78% of visitors rated the quality of service as 'good' or 'excellent' whilst 74% said the same in terms of value for money. 18% and 22% of visitors respectively rated the quality of service and value for money of the transport on St. Mary's as 'fair' and 5% and 4% respectively as 'poor'.

With the exception of the value for money of transport on St. Mary's (2.95 out of 4.00) the mean satisfaction scores calculated for all aspects of travel within and around the Islands were high. Scores ranged from 3.02 for the quality of service of transport on St. Mary's to 3.42 for the quality of service on the inter-island transport along with 3.27 for inter-island travel information and 3.08 for the value for money of the inter-island transport.

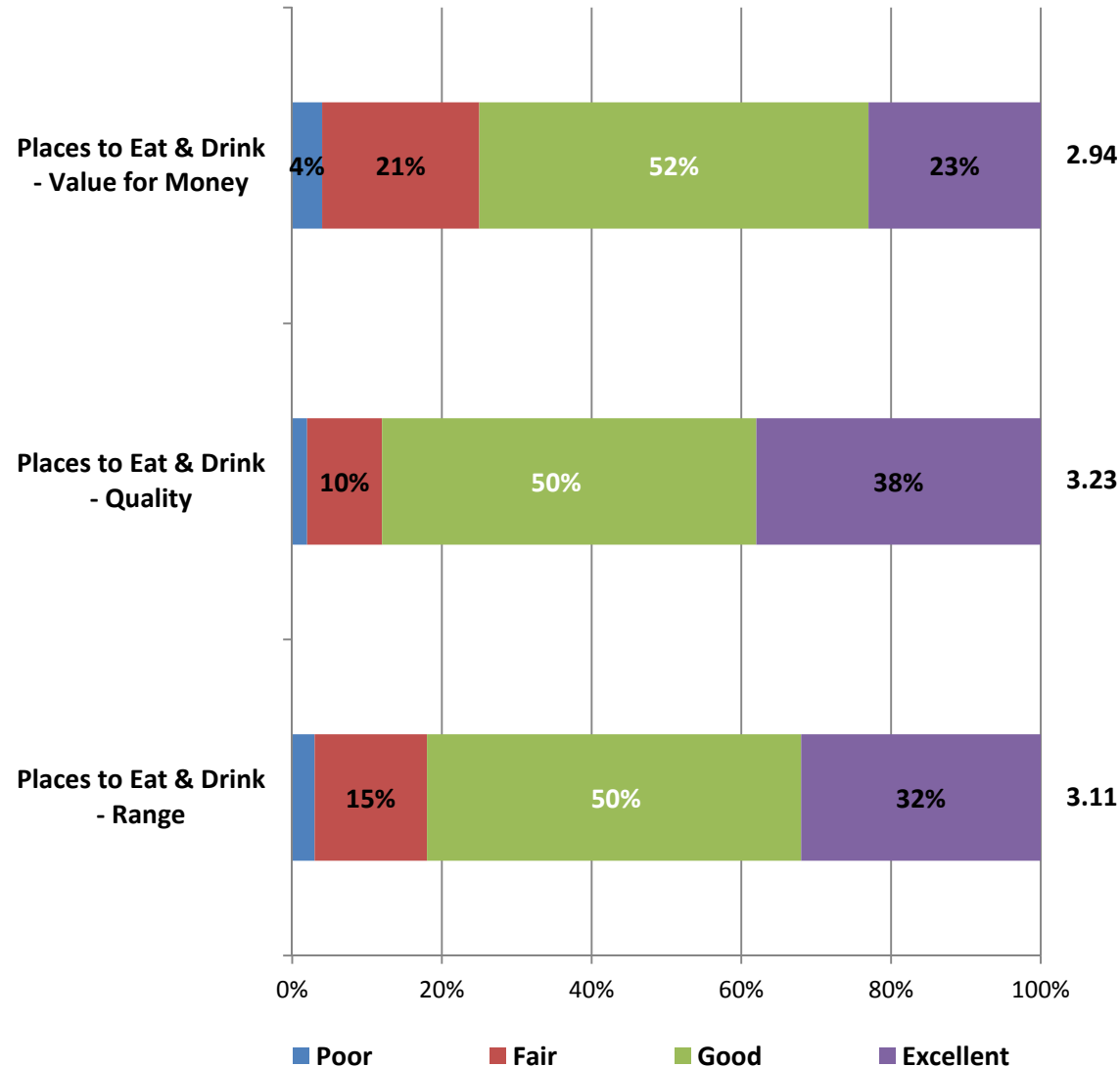
The mean satisfaction scores for each of the segments are shown in the table overleaf. 57

On the whole, levels of satisfaction with the different aspects of travel within and around the Islands were highest amongst staying visitors, January to March and April to June visitors, those on a repeat visit, those staying 5-7 nights and those who had travelled by Skybus.

Travel - mean satisfaction scores (out of a max. of 4.00)	Inter-Island Travel – Information	Inter-Island Travel - Quality of Service	Inter-Island Travel - Value for Money	Transport on St. Mary's - Quality of Service	Transport on St. Mary's - Value for Money
2015 SURVEY	3.27	3.42	3.08	3.02	2.95
STAYING	3.28	3.42	3.08	3.02	2.95
DAY	3.04	3.18	2.98	3.12	2.92
JAN-MAR	2.94	3.29	2.74	3.35	3.13
APR-JUN	3.28	3.44	3.11	3.07	2.99
JUL-SEP	3.27	3.40	3.06	2.99	2.92
OCT-DEC	3.26	3.39	3.14	3.00	2.83
FIRST TIME	3.22	3.34	3.22	3.00	3.00
REPEAT	3.29	3.44	3.02	3.03	2.93
2-4 NIGHTS	3.17	3.32	3.08	3.00	3.00
5-7 NIGHTS	3.32	3.44	3.15	3.07	2.99
8+ NIGHTS	3.24	3.44	2.95	2.95	2.87
MAIN	3.32	3.47	3.07	3.08	3.01
SECOND	3.27	3.39	3.07	2.92	2.84
SHORT	3.18	3.33	3.13	2.97	2.93
ST MARY'S	3.28	3.42	3.10	3.04	2.96
ST AGNES	3.29	3.51	3.10	2.87	2.85
BRYHER	3.29	3.39	3.13	2.94	2.89
TRESCO	3.22	3.38	3.05	2.96	2.88
ST MARTIN'S	3.22	3.40	3.05	2.95	2.91
SKYBUS	3.29	3.42	3.09	3.15	3.02
SCILLONIAN	3.26	3.41	3.07	2.90	2.87
PRIVATE	3.16	3.44	2.94	3.00	3.07

 Highest average mean score for indicator within each segment type

With the exception of the value for money, the mean satisfaction scores calculated for all aspects of the places to eat & drink on the Islands were high.



82% of visitors rated the range of places to eat & drink on the Islands as 'good' or 'excellent', as did 88% for the quality and 75% for the value for money.

21% of visitors rated the value for money of the places to eat & drink on the Islands as 'fair' and 4% as 'poor'.

With the exception of the value for money, the mean satisfaction scores calculated for all aspects of the places to eat & drink on the Islands were high, ranging from 3.11 out of 4.00 for the range of places to at & drink to 3.23 for the quality of the places to eat and drink.

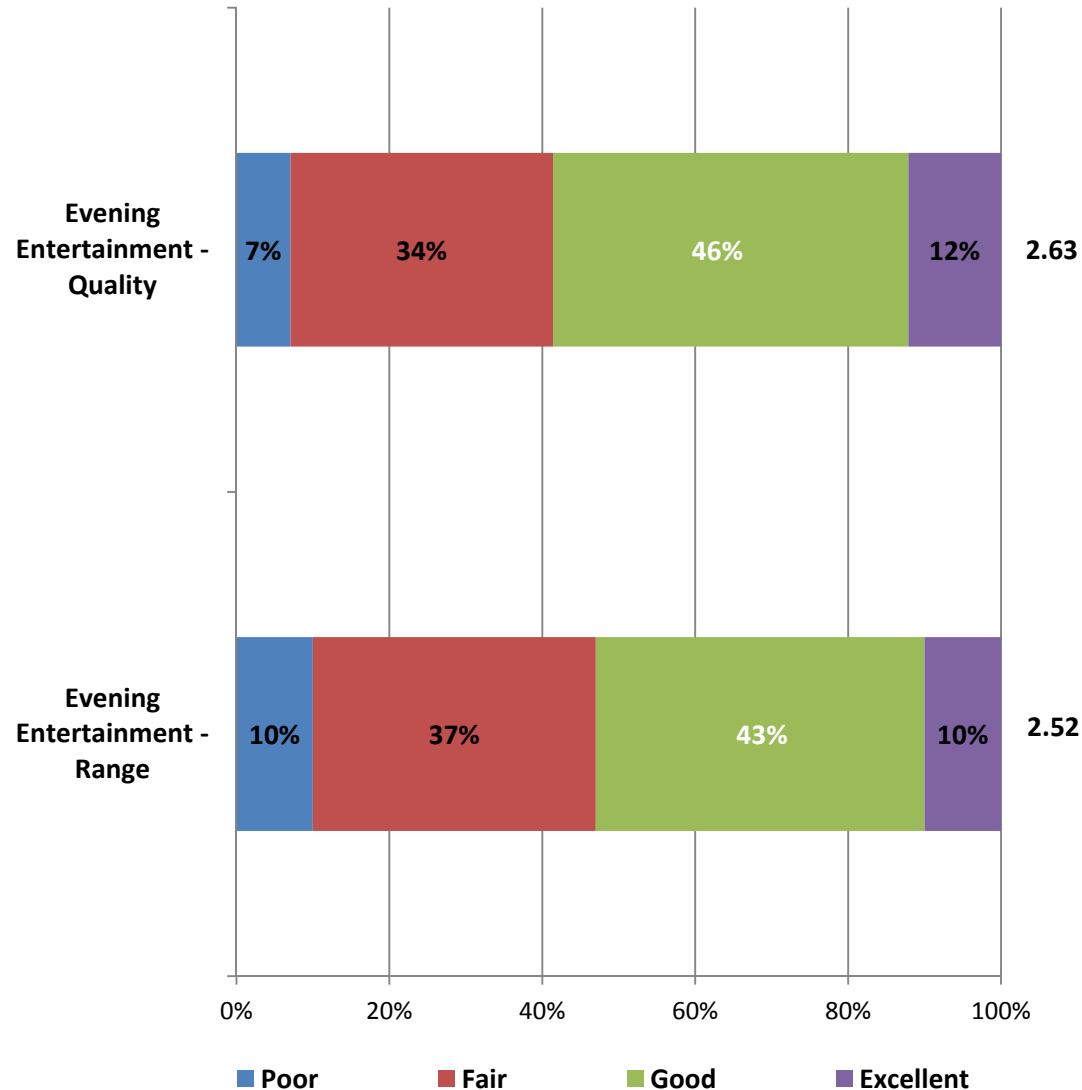
The mean satisfaction scores for each of the segments are shown in the table overleaf.

On the whole, levels of satisfaction with the places to eat and drink on the Islands were highest amongst January to March visitors, those on a repeat visit, those staying 5-7 nights, those on their main holiday of the year, those staying on St. Agnes and St. Martin's and those who had travelled by Skybus.

Places to eat & drink - mean satisfaction scores (out of a max. of 4.00)	Range	Quality	Value for money
2015 SURVEY	3.11	3.23	2.94
STAYING	3.11	3.24	2.94
DAY	3.11	3.24	3.00
JAN-MAR	2.97	3.35	3.07
APR-JUN	3.15	3.25	2.99
JUL-SEP	3.10	3.22	2.91
OCT-DEC	2.90	3.19	2.81
FIRST TIME	3.04	3.20	2.98
REPEAT	3.13	3.25	2.92
2-4 NIGHTS	2.99	3.19	2.96
5-7 NIGHTS	3.16	3.25	2.98
8+ NIGHTS	3.07	3.22	2.84
MAIN	3.20	3.30	2.99
SECOND	3.04	3.15	2.86
SHORT	2.94	3.15	2.89
ST MARY'S	3.12	3.24	2.95
ST AGNES	3.15	3.24	2.97
BRYHER	3.11	3.25	2.94
TRESCO	3.10	3.23	2.95
ST MARTIN'S	3.18	3.27	2.96
SKYBUS	3.15	3.25	2.95
SCILLONIAN	3.08	3.22	2.92
PRIVATE	2.71	3.14	2.90

 Highest average mean score for indicator within each segment type

The two mean satisfaction scores calculated for evening entertainment on the Islands were the lowest of all the indicators explored during the 2015 survey.



53% of visitors rated the range of evening entertainment on the Islands as 'good' or 'excellent', as did 58% in terms of quality.

37% of visitors rated the range of evening entertainment on the Islands as 'fair' and 10% as 'poor', as did 34% and 7% of visitors respectively when considering the quality of evening entertainment on the Islands.

The two mean satisfaction scores calculated for evening entertainment on the Islands were the lowest of all the indicators explored during the 2015 survey at 2.52 out of 4.00 for the range of evening entertainment and 2.63 in terms of quality.

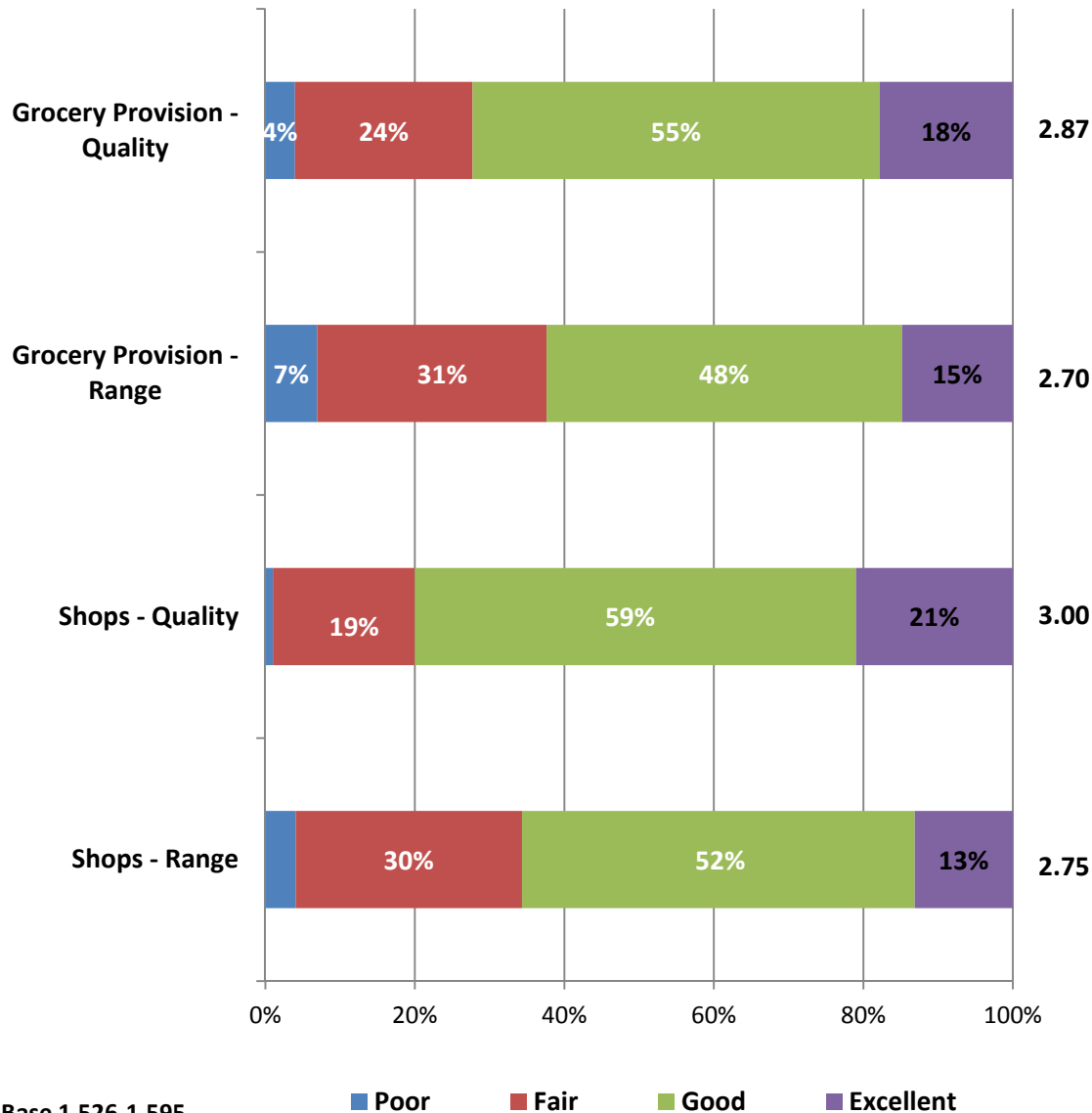
The mean satisfaction scores for each of the segments are shown in the table overleaf.

On the whole, levels of satisfaction with evening entertainment on the Islands were highest amongst day visitors, April to June visitors, those on a repeat visit, those staying 8+ nights, those on their main holiday of the year, those staying on Tresco and those who had travelled by private transport to the Islands.

Evening entertainment- mean satisfaction scores (out of a max. of 4.00)	Range	Quality
2015 SURVEY	2.52	2.63
STAYING	2.52	2.63
DAY	2.75	2.73
JAN-MAR	2.24	2.55
APR-JUN	2.55	2.65
JUL-SEP	2.52	2.63
OCT-DEC	2.29	2.44
FIRST TIME	2.50	2.60
REPEAT	2.52	2.64
2-4 NIGHTS	2.44	2.52
5-7 NIGHTS	2.52	2.64
8+ NIGHTS	2.53	2.66
MAIN	2.65	2.78
SECOND	2.33	2.44
SHORT	2.36	2.41
ST MARY'S	2.54	2.64
ST AGNES	2.57	2.68
BRYHER	2.55	2.72
TRESCO	2.57	2.72
ST MARTIN'S	2.54	2.66
SKYBUS	2.52	2.64
SCILLONIAN	2.52	2.62
PRIVATE	2.60	2.67

 Highest average mean score for indicator within each segment type

The mean satisfaction scores calculated for all aspects of shopping on the Islands were good.



65% of visitors rated the range of shops on the Islands as 'good' or 'excellent', as did 80% for the quality of the shops. 63% rated the range of groceries as 'good' or 'excellent' as did 73% for the quality of the groceries.

30% of visitors rated the range of shops as 'fair' as did 31% for the range of groceries and 24% for the quality of the groceries. 7% of visitors rated the range of groceries as 'poor'.

The mean satisfaction scores calculated for all aspects of shopping on the Islands were good and ranged from 2.70 out of 4.00 for the range of groceries to 3.00 for the quality of the shops, along with 2.75 for the range of shops and 2.87 for the quality of the groceries.

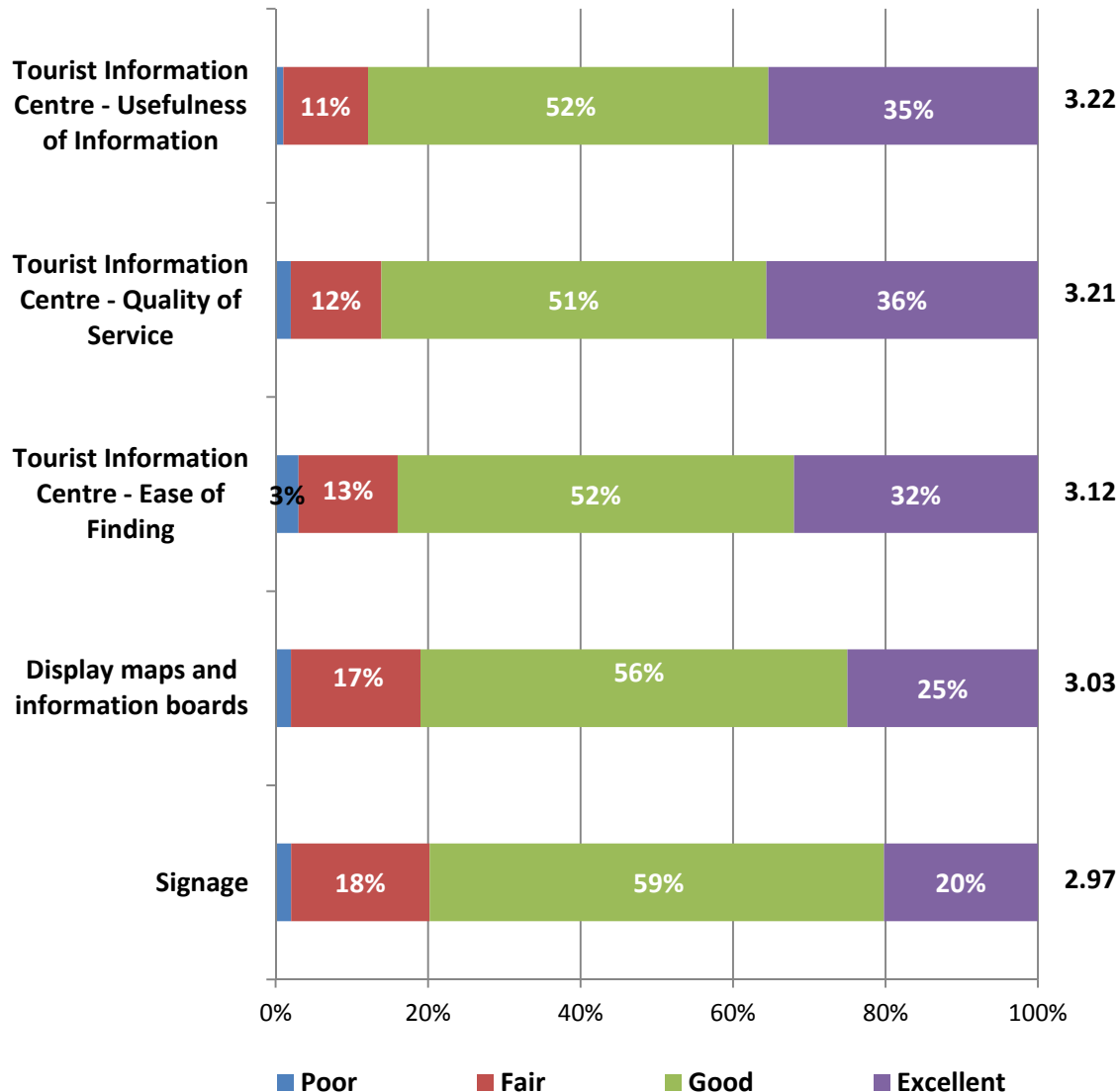
The mean satisfaction scores for each of the segments are shown in the table overleaf.

On the whole, levels of satisfaction with shopping provision on the Islands were highest amongst day visitors, January to March and July to September visitors, those staying 5-7 nights, those on their main holiday of the year and those staying on Tresco.

Shopping - mean satisfaction scores (out of a max. of 4.00)	Range of shops	Quality of shops	Range of grocery provision shops	Quality of grocery provision shops
2015 SURVEY	2.75	3.00	2.70	2.87
STAYING	2.74	3.00	2.69	2.86
DAY	2.78	3.00	2.78	2.91
JAN-MAR	2.66	2.90	2.79	2.96
APR-JUN	2.74	2.99	2.74	2.89
JUL-SEP	2.76	3.01	2.67	2.85
OCT-DEC	2.67	2.91	2.62	2.81
FIRST TIME	2.71	2.98	2.73	2.93
REPEAT	2.76	3.00	2.68	2.84
2-4 NIGHTS	2.72	2.94	2.67	2.85
5-7 NIGHTS	2.77	3.01	2.75	2.93
8+ NIGHTS	2.70	2.99	2.60	2.75
MAIN	2.83	3.07	2.72	2.89
SECOND	2.65	2.92	2.66	2.85
SHORT	2.64	2.89	2.65	2.81
ST MARY'S	2.76	3.00	2.71	2.88
ST AGNES	2.76	3.01	2.77	2.85
BRYHER	2.75	2.91	2.74	2.85
TRESCO	2.77	3.04	2.71	2.86
ST MARTIN'S	2.73	2.97	2.69	2.82
SKYBUS	2.74	2.98	2.70	2.84
SCILLONIAN	2.75	3.01	2.69	2.88
PRIVATE	2.57	3.00	2.85	3.05

 Highest average mean score for indicator within each segment type

With the exception of signage on the Islands, the mean satisfaction scores calculated for all aspects of the ease of finding your way around and the TIC were high.



79% of visitors rated the signage on the Islands as ‘good’ or ‘excellent’, compared with 81% for the display maps and information boards. 18% and 17% of visitors respectively rated the signage and display maps and information boards on the Islands as ‘fair’.

In terms of the tourist information centre (TIC), 84% rated the ease of finding it as ‘good’ or ‘excellent’ and 87% in each case rated it the same in terms of quality of service and usefulness of the information they received.

With the exception of signage on the Islands, the mean satisfaction scores calculated for all aspects of the ease of finding your way around and the TIC were high. Scores ranged from 3.03 out of 4.00 for the display maps and information boards to 3.22 for the usefulness of the information received at the TIC, along with 3.21 for the quality of service at the TIC and 3.12 for the ease of finding it. At 2.97, the average score for signage on the Islands was the ninth lowest ranked indicator of all those explored during the 2015 survey.

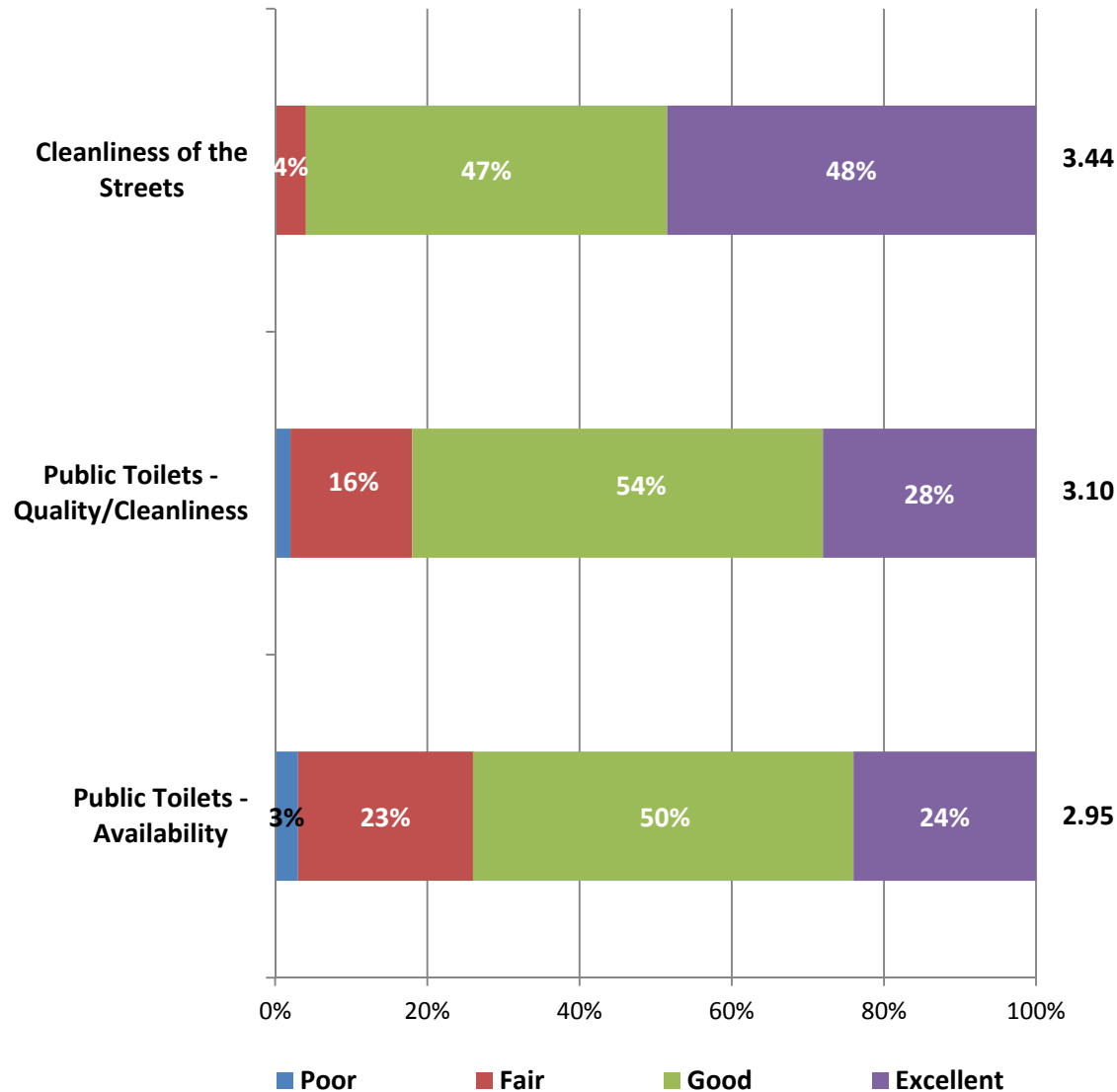
The mean satisfaction scores for each of the segments are shown in the table overleaf.

On the whole, levels of satisfaction with ease of finding their way around/the TIC were highest amongst day visitors, April to June visitors, repeat visitors, those staying 5-7 nights, those on their main holiday of the year and those arriving by Skybus.

Ease of finding way around/TIC - mean satisfaction scores (out of a max. of 4.00)	Signage	Display maps and information boards	Tourist Information Centre - Ease of Finding	Tourist Information Centre - Quality of Service	Tourist Information Centre - Usefulness of Information
2015 SURVEY	2.97	3.03	3.12	3.21	3.22
STAYING	2.96	3.02	3.12	3.21	3.22
DAY	3.02	3.12	3.15	3.19	3.17
JAN-MAR	3.10	3.00	2.88	3.13	3.16
APR-JUN	2.97	3.05	3.15	3.25	3.24
JUL-SEP	2.97	3.01	3.11	3.19	3.21
OCT-DEC	2.95	2.99	3.02	3.16	3.16
FIRST TIME	2.95	3.02	3.10	3.19	3.21
REPEAT	2.98	3.03	3.13	3.22	3.22
2-4 NIGHTS	2.93	2.97	3.01	3.12	3.12
5-7 NIGHTS	2.97	3.03	3.14	3.24	3.24
8+ NIGHTS	2.96	3.02	3.12	3.22	3.23
MAIN	3.04	3.09	3.19	3.28	3.30
SECOND	2.88	2.95	3.05	3.13	3.14
SHORT	2.89	2.92	2.98	3.12	3.10
ST MARY'S	2.98	3.04	3.14	3.23	3.23
ST AGNES	2.99	3.06	3.19	3.22	3.22
BRYHER	2.96	3.05	3.15	3.22	3.23
TRESCO	3.01	3.07	3.14	3.20	3.21
ST MARTIN'S	2.97	3.02	3.13	3.14	3.15
SKYBUS	3.00	3.03	3.15	3.23	3.24
SCILLONIAN	2.94	3.02	3.09	3.20	3.21
PRIVATE	2.94	2.95	3.00	3.00	2.88

 Highest average mean score for indicator within each segment type

The mean satisfaction scores for the public toilets and cleanliness of the streets on the Islands were rated high with the cleanliness of the streets ranked the fifth highest indicator of all those explored in terms of satisfaction during the 2015 survey.



74% of visitors rated the availability of the public toilets on the Islands as 'good' or 'excellent' compared with 82% who said the same for their quality/cleanliness. 95% of visitors rated the cleanliness of the streets as 'good' or 'excellent'.

23% of visitors rated the availability of the public toilets as 'fair' compared with 16% who said the same for their quality/cleanliness. 3% of visitors rated the availability of public toilets on the Islands as 'poor'.


The mean satisfaction score for the quality/cleanliness of the public toilets and cleanliness of the streets on the Islands were both high at 3.10 and 3.44 respectively with the cleanliness of the streets ranked the fifth highest indicator of all those explored in terms of satisfaction during the 2015 survey.

At 2.95 the availability of public toilets on the Islands was the fifth lowest ranked indicator in terms of satisfaction during the 2015 survey.

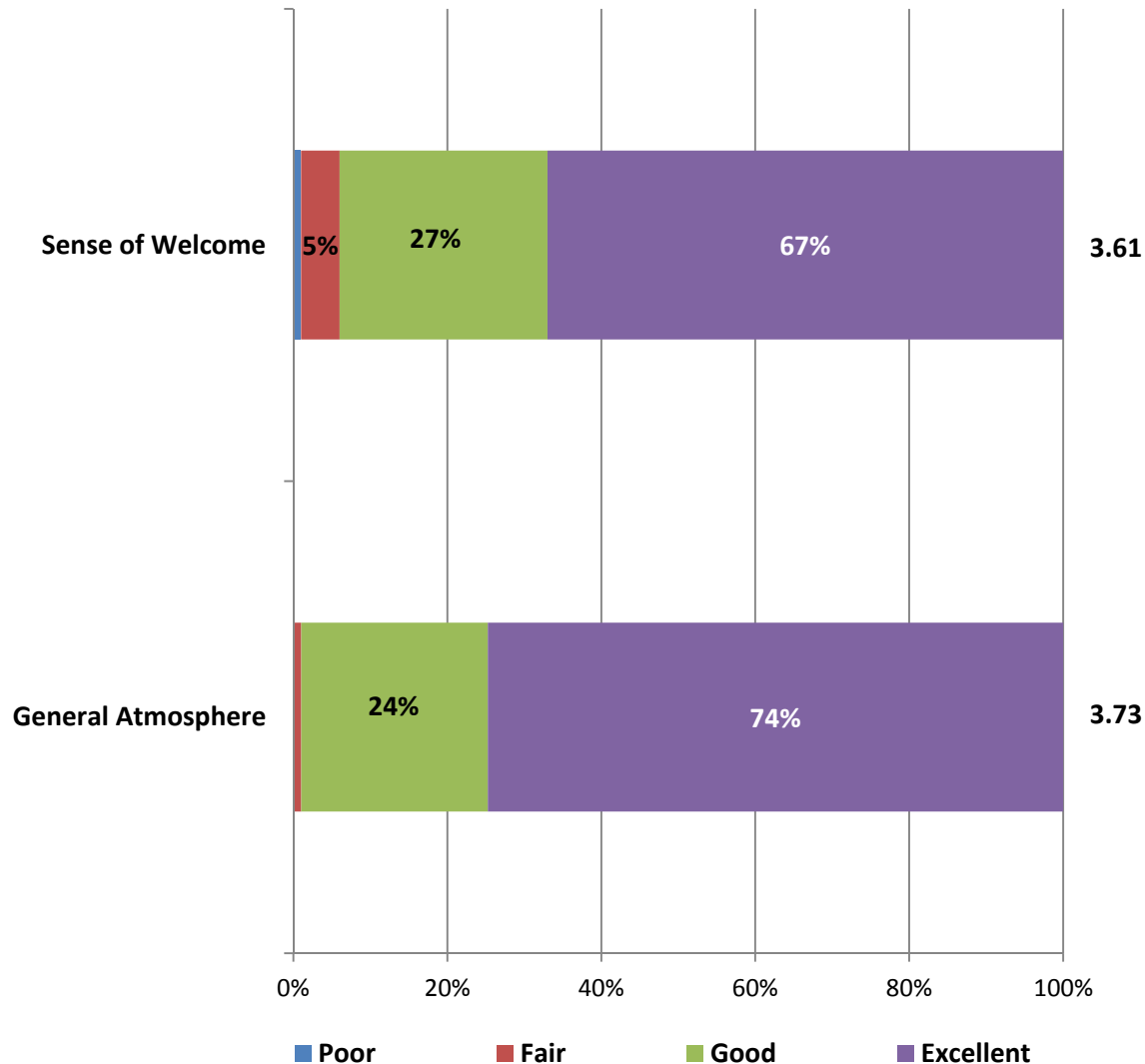
The mean satisfaction scores for each of the segments are shown in the table overleaf.

On the whole, levels of satisfaction with public toilets and cleanliness of the streets were highest amongst staying visitors, July to September visitors, first time visitors, those staying 5-7 nights, those on their main holiday of the year, those staying on St. Agnes and those arriving by the Scillonian.

Public toilets/cleanliness of the streets - mean satisfaction scores (out of a max. of 4.00)	Public Toilets – Availability	Public Toilets - Quality/Cleanliness	Cleanliness of the Streets
2015 SURVEY	2.95	3.10	3.44
STAYING	2.95	3.10	3.44
DAY	2.86	2.98	3.48
JAN-MAR	2.81	2.96	3.47
APR-JUN	2.91	3.08	3.41
JUL-SEP	2.99	3.11	3.46
OCT-DEC	2.84	3.08	3.48
FIRST TIME	2.93	3.10	3.49
REPEAT	2.96	3.09	3.42
2-4 NIGHTS	2.80	2.99	3.42
5-7 NIGHTS	2.96	3.13	3.47
8+ NIGHTS	3.00	3.09	3.40
MAIN	3.04	3.14	3.47
SECOND	2.86	3.09	3.42
SHORT	2.84	3.00	3.37
ST MARY'S	2.96	3.10	3.45
ST AGNES	3.03	3.13	3.49
BRYHER	3.03	3.14	3.48
TRESCO	3.02	3.13	3.41
ST MARTIN'S	2.98	3.08	3.40
SKYBUS	2.93	3.08	3.42
SCILLONIAN	2.97	3.11	3.46
PRIVATE	2.86	3.00	3.30

 Highest average mean score for indicator within each segment type

The general atmosphere and sense of welcome on the Islands were the two highest ranked indicators in terms of satisfaction amongst visitors explored by the 2015 survey.



98% of visitors rated the general atmosphere on the Islands as 'good' or 'excellent', as did 94% for the sense of welcome on the Islands.

Only 5% of visitors rated the sense of welcome as 'fair', compared with 1% of visitors doing so for the general atmosphere.

At 3.73 out of 4.00 for the general atmosphere and 3.61 for the sense of welcome on the Islands, these were the two highest ranked indicators in terms of satisfaction amongst visitors explored by the 2015 survey.

The mean satisfaction scores for each of the segments are shown in the table overleaf.

On the whole, levels of satisfaction with the general atmosphere and sense of welcome on the Islands were highest amongst staying visitors, repeat visitors, those staying 5-7 nights, those on their main holiday of the year, those staying on St. Agnes and those arriving by the Scillonian.

General atmosphere and sense of welcome- mean satisfaction scores (out of a max. of 4.00)	General atmosphere	Sense of welcome
2015 SURVEY	3.73	3.61
STAYING	3.73	3.62
DAY	3.62	3.46
JAN-MAR	3.61	3.66
APR-JUN	3.74	3.64
JUL-SEP	3.71	3.59
OCT-DEC	3.77	3.59
FIRST TIME	3.69	3.59
REPEAT	3.74	3.63
2-4 NIGHTS	3.68	3.58
5-7 NIGHTS	3.75	3.63
8+ NIGHTS	3.73	3.62
MAIN	3.77	3.67
SECOND	3.72	3.57
SHORT	3.64	3.55
ST MARY'S	3.73	3.61
ST AGNES	3.78	3.71
BRYHER	3.74	3.65
TRESCO	3.75	3.69
ST MARTIN'S	3.71	3.61
SKYBUS	3.71	3.61
SCILLONIAN	3.75	3.62
PRIVATE	3.52	3.52

 Highest average mean score for indicator within each segment type

51% of visitors felt the airport development had 'greatly improved' or 'improved' the Islands, whilst 61% said the same about the Porthcressa Development.

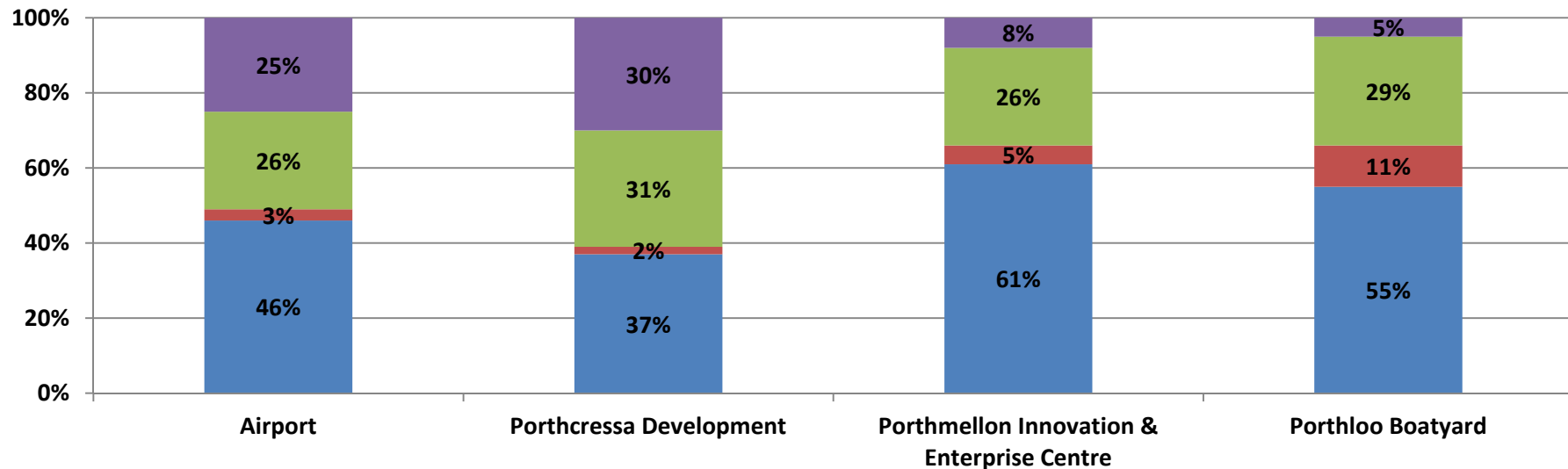
Visitors were informed that St. Mary's has benefitted from a number of European funded projects in recent years and, if they had visited the Islands before, how they would rate the developments in terms of improving the Islands.

The largest proportion of visitors in each case did not know about the development/were first time visitors to the Islands including 46% regarding the airport development, 37% the Porthcressa Development, 61% the Porthmellon Innovation & Enterprise Centre and 55% the Porthloo Boatyard.

51% of visitors felt the airport development had 'greatly improved' or 'improved' the Islands, whilst 61% said the same about the Porthcressa Development, 34% about the Porthmellon Innovation & Enterprise Centre and the same proportion regarding the Porthloo Boatyard.

There was little variation in the results according to segment.

Opinions of recent developments on the Islands



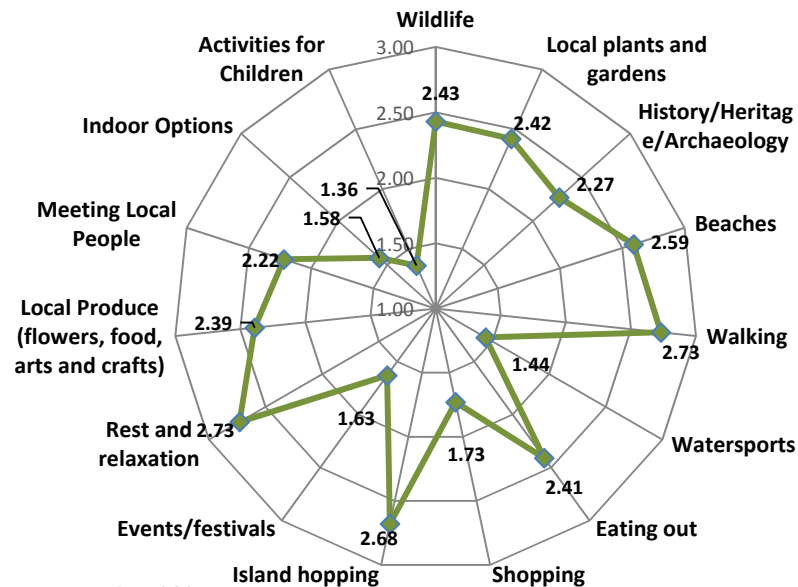
The features and activities on the Islands which visitors considered of highest importance to them were walking, rest and relaxation, island-hopping, the beaches, wildlife, local plants and gardens and eating out.

Visitors were asked to consider a number of features and activities that can be enjoyed during a visit to the Isles of Scilly and asked to rate them in terms of importance to them on a 1 to 3 scale where '1' was 'not important' and '3' was 'very important'. This then allowed an average importance score for each indicator to be calculated out of a max. of 3.00. The results for all respondents are shown in the charts below.

The features and activities on the Islands which visitors considered of highest importance to them were walking and rest and relaxation, both scoring 2.73 out of 3.00. These were closely followed by island-hopping (2.68), the beaches (2.59), wildlife (2.43), local plants and gardens (2.42) and eating out (2.41).

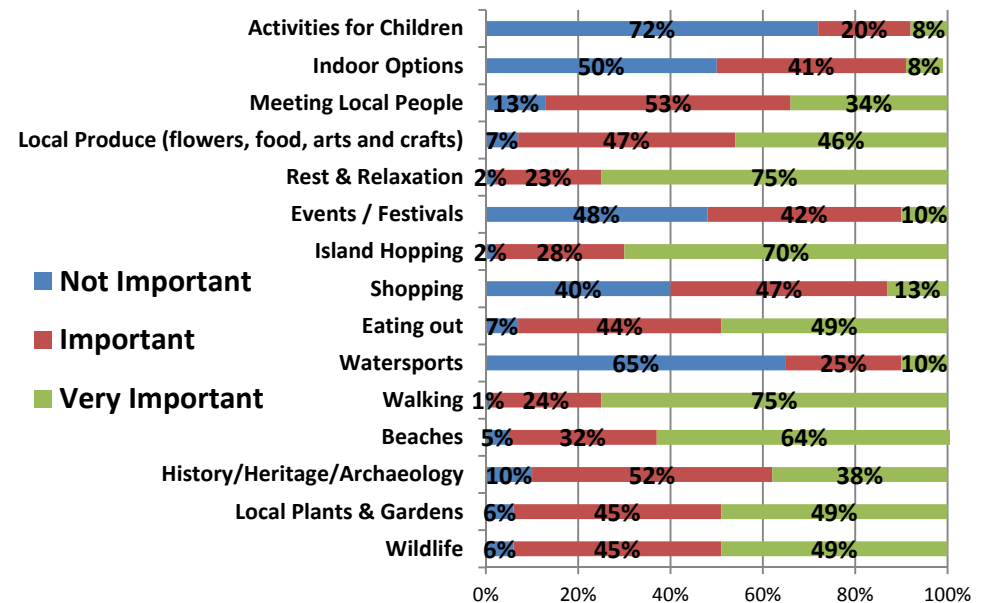
Those features/activities considered of lower importance amongst visitors were activities for children (1.36), watersports (1.44), indoor options (1.58), events/festivals (1.63) and shopping (1.73). There was little variation in the results by segment.

Importance of features & activities



Base 1,572-1,669

Importance of features & activities



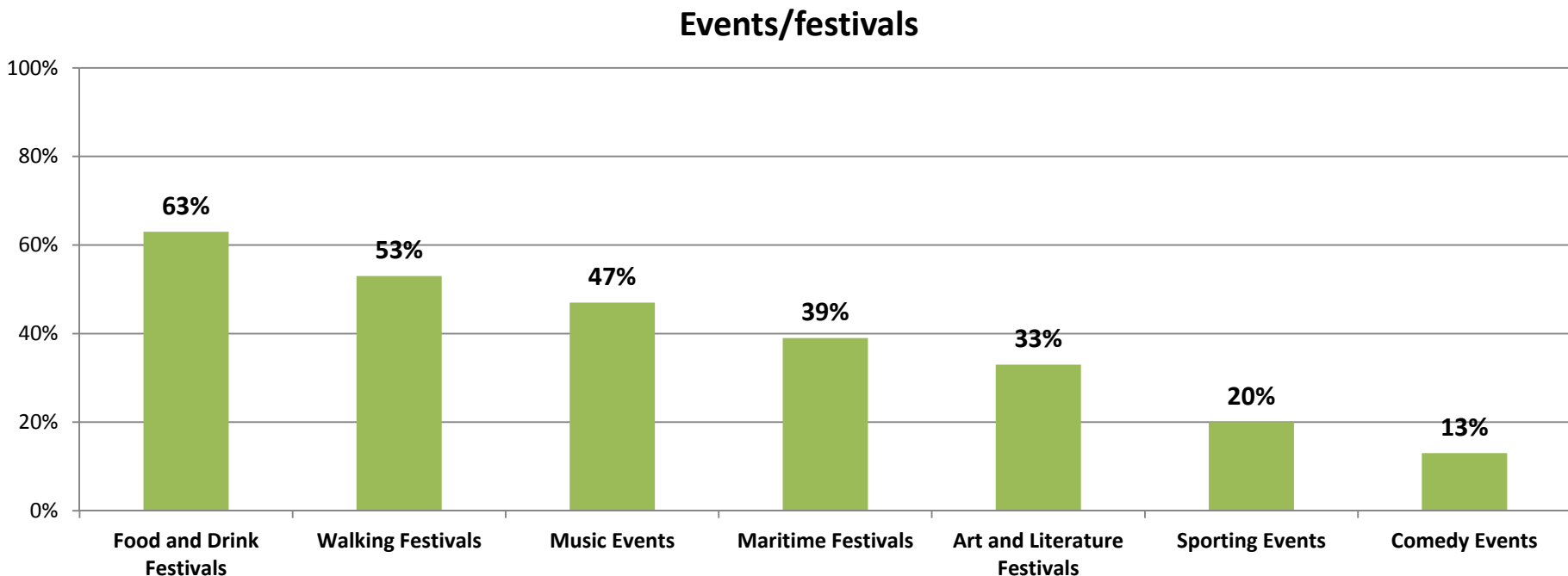
63% of visitors said food and drink festivals would encourage them to visit with walking festivals (53%), music events (47%) and maritime festivals (39%) the next most popular. The least popular were comedy events (13%) and sporting events (20%).

Visitors were also asked what types of events would encourage them to visit the Isles of Scilly.

63% of visitors said food and drink festivals would encourage them to visit with walking festivals (53%), music events (47%) and maritime festivals (39%) the next most popular. The least popular were comedy events (13%) and sporting events (20%).

There was little variation in the results by segment.

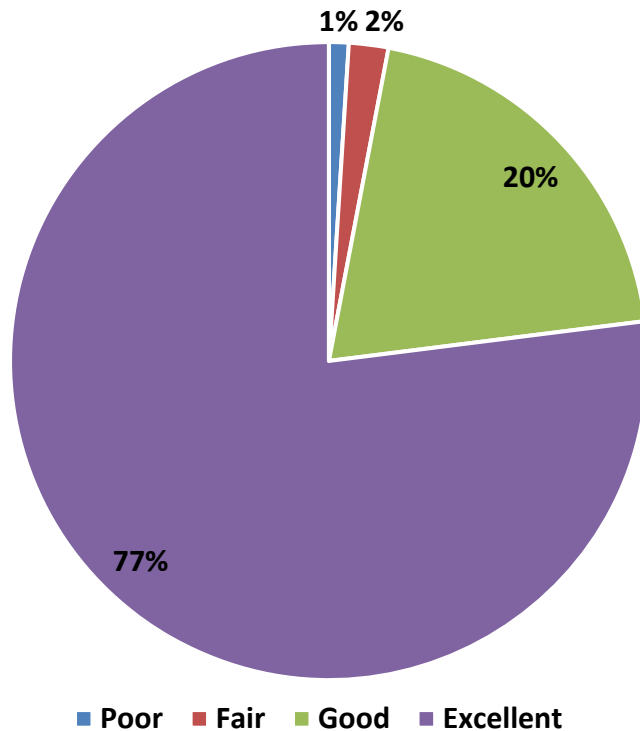
A number of respondents provided an 'other' type of event/festival which would encourage them to visit the Islands and these can be found in the appendices which accompany this report.



Base 1,244

**77% of visitors gave their holiday to the Islands an overall rating of 'excellent' and a further 20% as 'good'.
The average mean score for their holiday overall was calculated at 3.74 out of 4.00.**

Overall rating of holiday



77% of visitors gave their holiday to the Islands an overall rating of 'excellent' and a further 20% as 'good'.

Only 2% and 1% of visitors rated their holiday as 'fair' or 'poor' respectively.


The average mean score for their holiday overall was calculated at 3.74 out of 4.00.

The mean satisfaction score for each of the segments are shown in the table overleaf.

A number of respondents provided a comment about how they rated their holiday overall and these can be found in the appendices which accompany this report.

The overall rating of their holiday to the Islands was highest amongst staying visitors, October-December visitors, repeat visitors, those staying 8+ nights, those on their main holiday of the year, those staying on St. Agnes and those arriving by private transport.

Overall rating of holiday to the Islands- mean satisfaction scores (out of a max. of 4.00)	
2015 SURVEY	3.74
STAYING	3.76
DAY	3.54
JAN-MAR	3.69
APR-JUN	3.75
JUL-SEP	3.74
OCT-DEC	3.76
FIRST TIME	3.68
REPEAT	3.77
2-4 NIGHTS	3.61
5-7 NIGHTS	3.77
8+ NIGHTS	3.80
MAIN	3.80
SECOND	3.74
SHORT	3.62
ST MARY'S	3.74
ST AGNES	3.80
BRYHER	3.74
TRESCO	3.78
ST MARTIN'S	3.70
SKYBUS	3.74
SCILLONIAN	3.74
PRIVATE	3.79

 Highest average mean score for indicator within each segment type

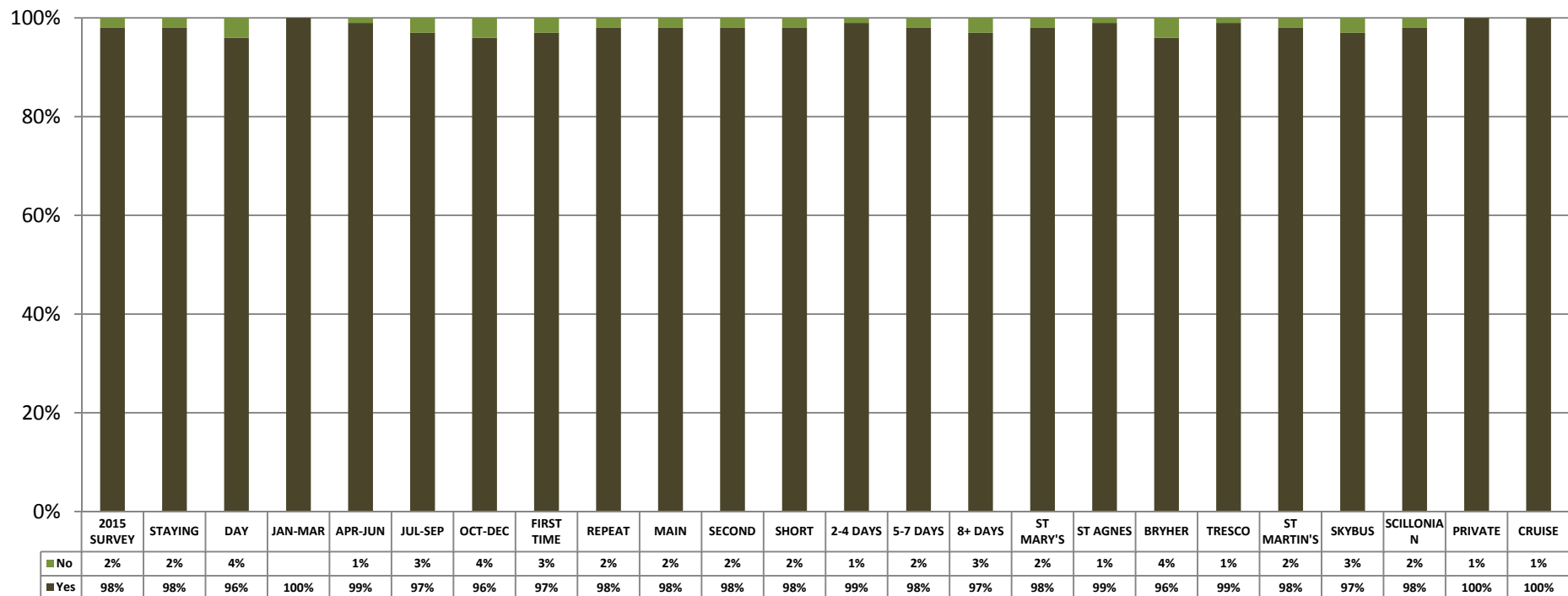
98% of visitors said they would recommend the Isles of Scilly as a holiday destination to their friends or family.

Respondents were asked whether they would recommend the Isles of Scilly as a holiday destination to their friends or family.

98% of respondents said they would do so. There was little variation in the results by segment.

A number of respondents provided a comment about their likelihood of recommending the Islands for a holiday which can be found in the appendices which accompany this report.

Whether would recommend the Isles of Scilly as a holiday destination to friends and family



Base 1,641

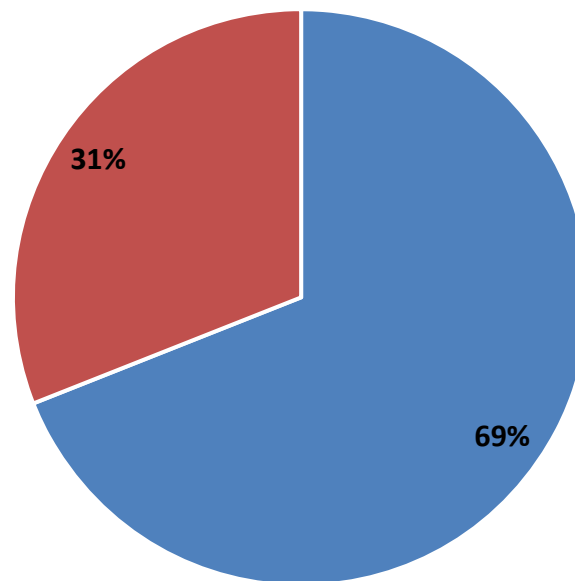
69% of respondents said they would consider taking a winter break on the Isles of Scilly.

69% of respondents said they would consider taking a winter break on the Isles of Scilly (71% 2014).

Whilst there was little variation in the results according to segment, this proportion decreased to 56% of first time visitors to the Islands.

A number of respondents provided a comment about what would encourage them to visit during the winter period which can be found in the appendices which accompany this report.

Whether would consider a winter break on the Isles of Scilly (Nov-Mar)?



Visitor Expenditure

islands
partnership



Average visitor spend per person per day on the Islands (excluding accommodation) was £49.30

Average visitor spend per person per day on the Islands (excluding accommodation) was £49.30 (£44.88 2014) ranging from £48.26 for staying visitors to £54.26 for those visiting the Islands for the day.

In addition, staying visitors spent an average of £46.11 per person per night on their accommodation on the Isles of Scilly (£38.65 2014).

VISITOR SPEND BY CATEGORY 2015 (£/per person/per day)

	Accommodation	Meals/ snacks	Tourist shopping	Transport	Activities	Other	TOTAL	TOTAL (EXCLUDING ACCOMMODATION)
ALL	-	£18.59	£10.15	£9.36	£7.68	£3.52	£49.30	£49.30
STAYING	£46.11	£18.50	£9.67	£9.17	£7.44	£3.48	£94.37	£48.26
DAY	-	£20.87	£14.37	£13.60	£5.42	-	£54.26	£54.26
ALL 2014	£38.65	£16.25	£8.30	£9.58	£7.27	£3.48	£83.53	£44.88

Isles of Scilly Online Visitor Survey 2015

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