Isles of Scilly
Visitor Survey 2017

Final report

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

May 2018

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Summary

islands partnership

The South West Research Company

Summary

- Almost all respondents were staying overnight on the Islands (93%).
- 67% of all visitors to the Islands were aged 45 years or over. Just 14% of visitors were aged 17 or under whilst 10% were aged 18-34 and the same proportion were aged 35-44 years.
- The average group size was 2.77 people.
- 86% of groups contained adults only.
- 96% of visitors were UK residents. Approximately 7% in each case lived within the TR (Truro) and PL (Plymouth) postal code areas.
- 74% of visitors were on a repeat visit to the Islands. The average number of previous visits to the Islands was 12.71.
- The peak months for visits to the Islands were June to September.
- The peak months for visits of 2-4 days to the Islands were May and September, compared with May, June and September for trips of 5-7 days and July and August for trips of 8+ days.
- 54% of visitors were visiting on their main holiday of the year.
- 53% of visitors were spending between 5 and 7 days on the Islands.
- The largest proportion of respondents arrived on the Islands on a Saturday (27%) and a further 19% on a Friday. 27% of visitors who arrived on a Saturday said it was very important that they did so, as was it for 20% of respondents who arrived on a Friday.
- 53% of respondents were staying in self-catering accommodation on the Islands whilst a further 32% were staying in a hotel or B&B/guest house.

Summary

- 27% of respondents in each case booked their accommodation over the phone or online and 22% booked via email.

- 65% of respondents felt if was ‘very important’ or ‘important’ that their accommodation on the Islands had a quality (star) rating.

- 78% of respondents had stayed on St. Mary's.

- Other than the island where they had stayed, 73% of respondents had visited Tresco, 62% St. Martin's and 61% St. Agnes. 57% had visited Bryher and 48% St Mary’s.

- The scenery and/or peace and quiet (86% and 80% respectively) inspired the largest proportions of respondents to visit the Islands.

- The largest proportion of visitors (45%) had first heard about the Isles of Scilly from a previous visit and a further 23% from a personal recommendation.

- The www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites had been used by 59% and 50% of respondents respectively 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 on social media (89%) used Facebook on a regular basis.

- 40% of respondents had booked their holiday to the Islands 9 months or more in advance. 17% booked less than 2 months before their visit.

- All factors related to satisfaction with inter-island boat travel received good average scores of between 3.04 and 3.41 out of a max. of 4.00.

- 49% of respondents had travelled to the Islands on the Scillonian and a further 44% via the Skybus.

- Three quarters of respondents 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 3.00 and 3.19 out of 4.00.

- St Mary's Airport received the highest levels of satisfaction amongst visitors (except for accessibility) and Penzance Quay the lowest (except for car parking and customer service).

- 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.

- The areas for attention are the range and quality of grocery provision, value of food & drink, quality of shops and range and quality of evening entertainment.

- The features and activities on the Islands which visitors considered of highest importance to them were walking, rest and relaxation, island-hopping, the beaches, local food & drink and wildlife.

- 68% of visitors said nature & wildlife events would encourage them to visit with food & drink festivals (63%), walking festivals (52%), music events (43%) and maritime festivals (39%) the next most popular. The least popular were comedy events (12%) and sporting events (14%).

- Two thirds of respondents said they would consider taking a winter break on the Isles of Scilly.

- 76% of visitors rated their holiday to the Islands as 'excellent' and a further 21% as 'good. The average mean score for their holiday overall was calculated at 3.73 out of 4.00.

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

- 35% of visitors said they would make improvements to the Isles of Scilly as a holiday destination.

- Average visitor spend per person per day on the Islands (excluding accommodation) was £41.16. Staying visitors spent an average of £44.51 per person per night on their accommodation.

Introduction

Background & research objectives

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 an 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 undertook further visitor research in 2017 in the form of an online and self-complete survey to build upon previous visitor research undertaken since 2014. The survey design, 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 combined results for the online and self complete survey findings. A total of 2,576 useable online submissions were received along with 210 self complete surveys resulting in a total survey sample of 2,786 for analysis purposes.

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 the quality and performance of Scilly's tourism industry and supporting the ambitions set out in the islands' Destination Management Plan (2018). 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, informing future product development and identifying emerging trends.

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 2,576) **(STAYING)**
- Day visitor (Sample 182) **(DAY)**

Time of year when visited:

- Jan-Mar (Sample 56) **(JAN-MAR)**
- Apr-Jun (Sample 1,092) **(APR-JUN)**
- Jul-Sept (Sample 1,420) **(JUL-SEPT)**
- Oct-Dec (Sample 188) **(OCT-DEC)**

Previous visits:

- First time visitor (Sample 710) **(FIRST TIME)**
- Repeat visitor (Sample 2,048) **(REPEAT)**

Length of stay:

- 2-4 days (Sample 353) **(2-4 DAYS)**
- 5-7 days (Sample 1,452) **(5-7 DAYS)**
- 8+ days (Sample 771) **(8+ DAYS)**

Type of trip:

- Main holiday (Sample 1,456) **(MAIN)**
- Second holiday (Sample 744) **(SECOND)**
- Short break (Sample 382) **(SHORT)**

Islands stayed on:

- St. Mary's (Sample 1,972) **(ST MARY'S)**
- St. Agnes (Sample 228) **(ST AGNES)**
- Bryher (Sample 276) **(BRYHER)**
- Tresco (Sample 404) **(TRESCO)**
- St. Martin's (Sample 328) **(ST MARTIN'S)**

How travelled to the Islands:

- Skybus (Sample 1,174) **(SKYBUS)**
- Scillonian III (Sample 1,290) **(SCILLONIAN)**
- Private transport (Sample 34) **(PRIVATE)**
- Cruise ship (Sample 26) **(CRUISE)**
- Other transport (Sample 123) **(OTHER TRANSPORT)**

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 and self complete questionnaires 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 each of the surveys.

The base counts provided under each chart/table refer to the total responding to that question for the 2017 survey only.

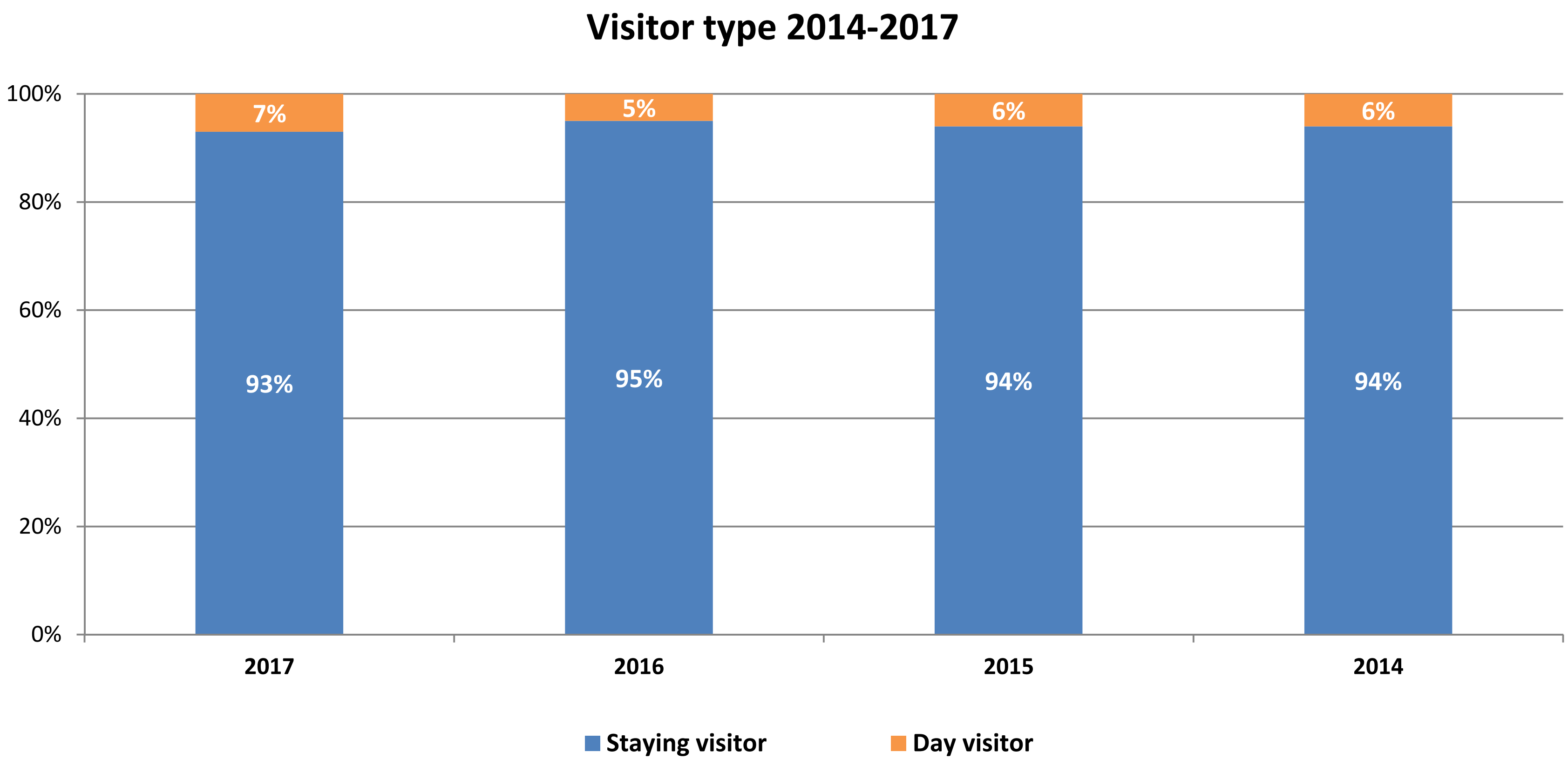
Visitor Profile

Almost all respondents were staying overnight on the Islands.

93% of respondents were staying overnight on the Isles of Scilly (95% 2016 and 94% in each case during 2015 and 2014).

7% of respondents were on a day trip to the Islands (5% 2016 and 6% in each case during 2015 and 2014).

The results by each of the analysis segments is provided overleaf.



Base 2,758

With the exception of respondents who had travelled to the Islands via cruise ship, the majority of respondents across all analysis segments were categorised as staying visitors.

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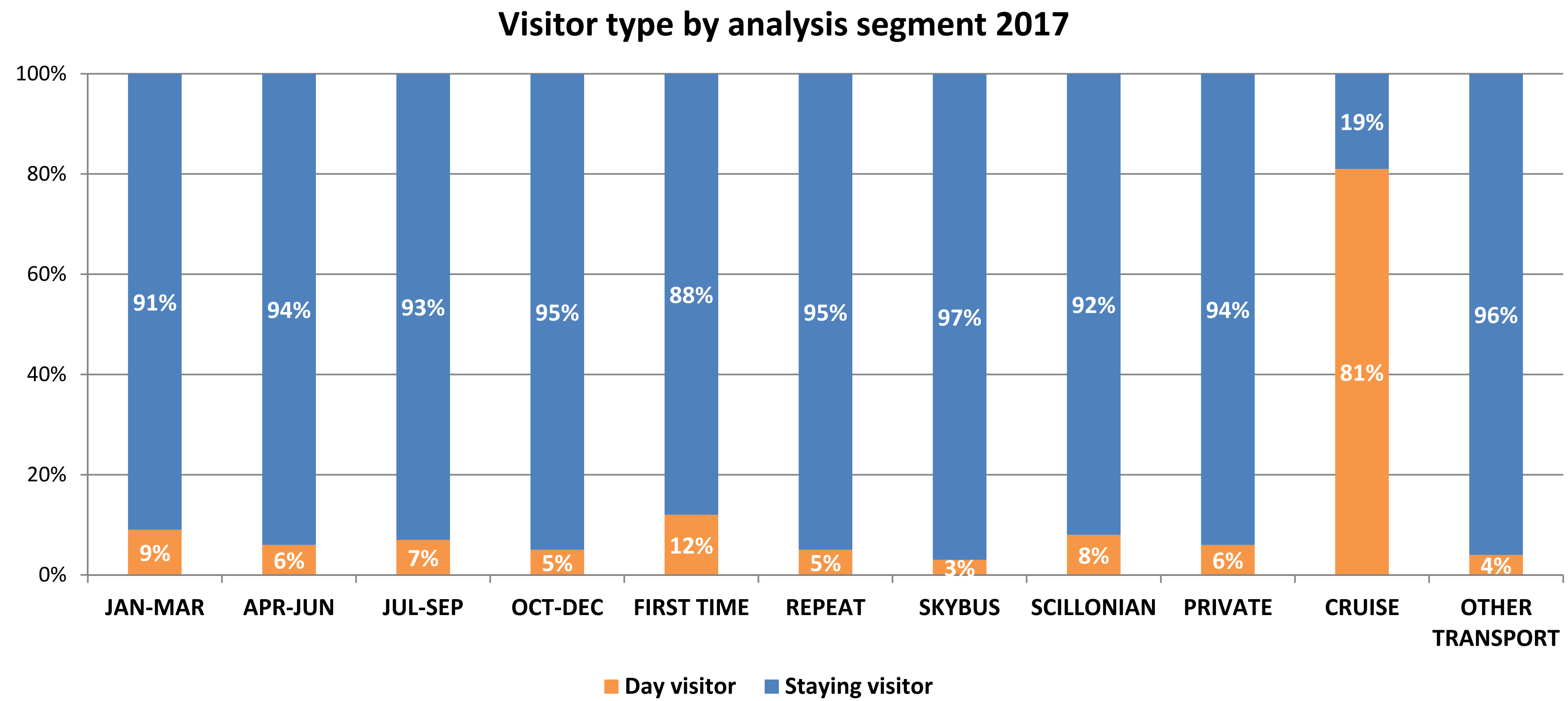
81% of respondents who had arrived in the Islands on a cruise ship and 12% of first time visitors to the Islands were categorised as day visitors along with 8% of visitors who travelled to the Islands on the Scillonian. There was little variation in the results according to the islands which respondents had stayed on or the type of trip.



Base 2,758

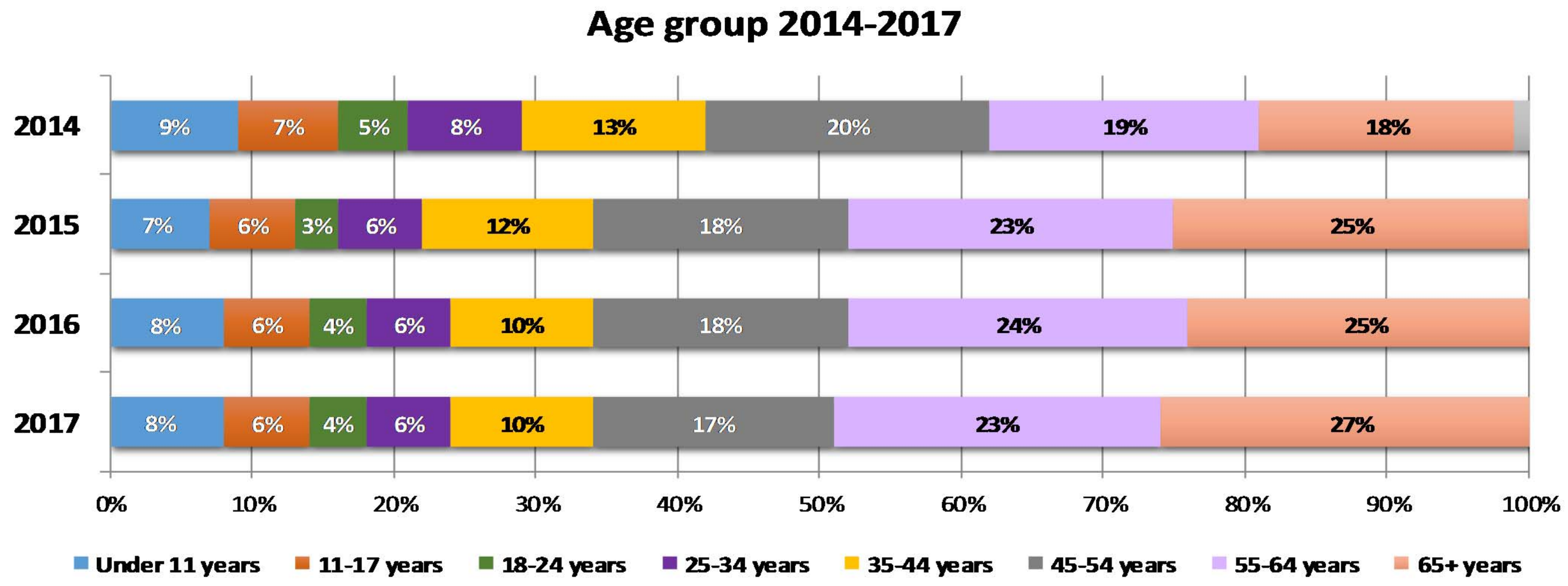
67% of visitors were aged 45+. 86% of groups contained adults only.

67% of all visitors to the Islands were aged 45 years or over including 27% aged 65+ years, 23% aged 55-64 years and 17% aged 45-54 years. Just 14% of visitors were aged 17 or under whilst 10% were aged 18-34 and 10% 35-44 years.

86% of groups contained adults only and 14% contained children aged 17 years or under.

The average group size was 2.77 people (2.78 2016 and 2.68 and 2.49 people during 2015 and 2014 respectively).

The age profile of visitors and composition of groups was virtually unchanged compared to the 2016 survey and there was little variation in the results according to each of the analysis segments.



Base 2,757

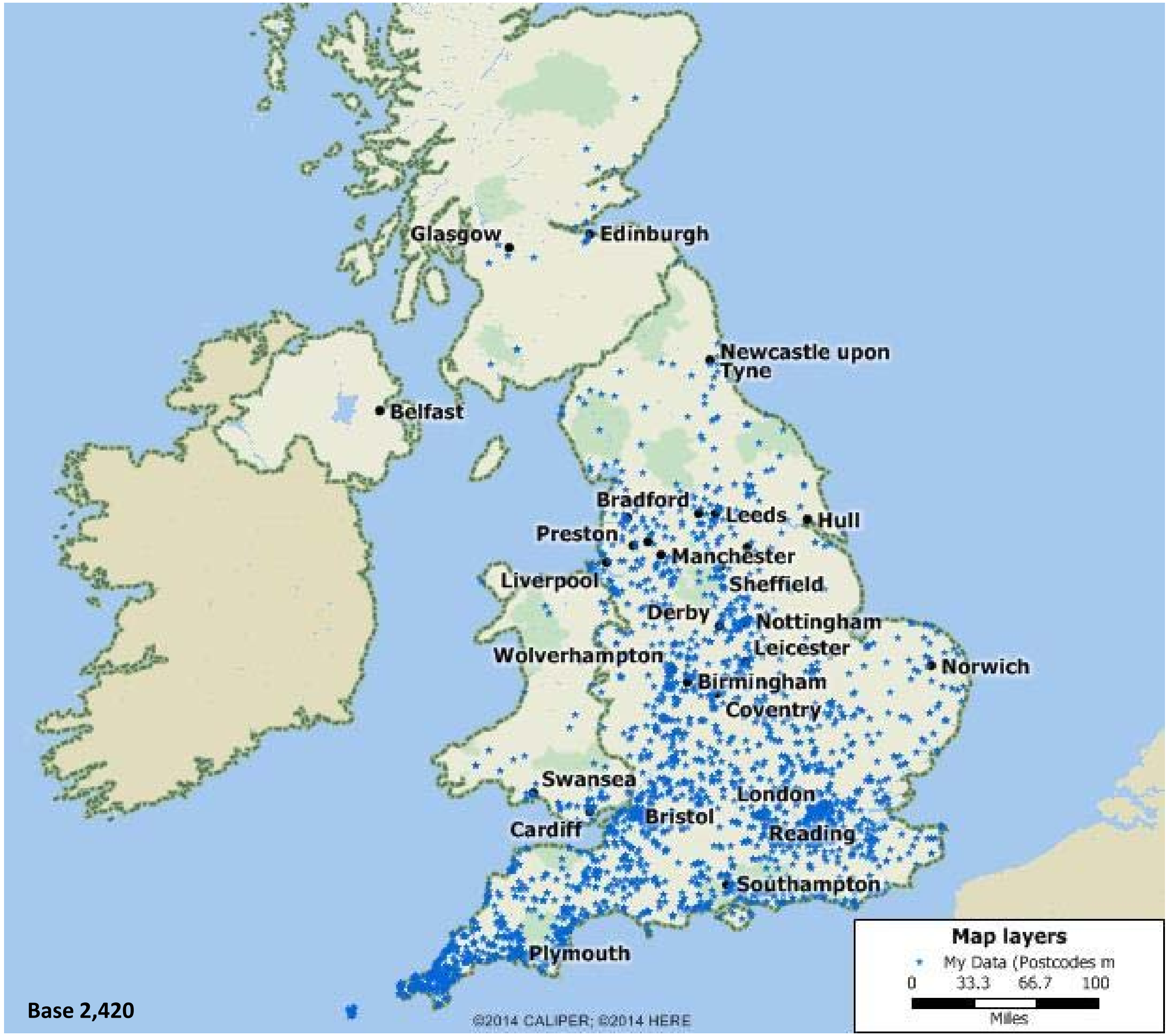
96% of visitors were UK residents. Approximately 7% in each case lived within the TR (Truro) and PL (Plymouth) postal code areas.

Survey respondents were asked to provide the postal code of their main residence to analyse where they came from.

97% of respondents were UK residents and 3% were from overseas.

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

Around 7% of all UK respondents in each case lived within the TR (Truro) and PL (Plymouth) postal code areas. 5% lived within EX (Exeter) postal code area and 4% within BS (Bristol) postal code areas.



Postcode area– UK RESPONDENTS (97% OF SAMPLE)					
Truro	7%	Brighton	1%	London SW	1%
Plymouth	7%	Cardiff	1%	Canterbury	1%
Exeter	5%	Birmingham	1%	Swansea	1%
Bristol	4%	Hemel Hempstead	1%	Doncaster	1%
Gloucester	3%	Bournemouth	1%	Llandudno	1%
Bath	2%	Norwich	1%	Other UK (less than 1% each)	13%
Torquay	2%	Sheffield	1%		
Taunton	2%	Chester	1%		
Reading	2%	Stockport	1%		
Guildford	2%	Cambridge	1%		
Oxford	2%	Kingston Upon Thames	1%		
Coventry	2%	Leeds	1%		
Peterborough	2%	Medway	1%		
Tonbridge	2%	Salisbury	1%		
Nottingham	2%	Milton Keynes	1%		
Dorchester	2%	Stoke-On-Trent	1%		
Portsmouth	2%	Dudley	1%		
Swindon	2%	Ipswich	1%		
Derby	1%	Preston	1%		
Leicester	1%	Shrewsbury	1%		
Northampton	1%	Chelmsford	1%		
Redhill	1%	Stevenage	1%		
Southampton	1%	Newport	1%		

The Islands attract a large number of frequent visitors who have been visiting the Islands for many years. 74% of visitors were on a repeat visit to the Islands.

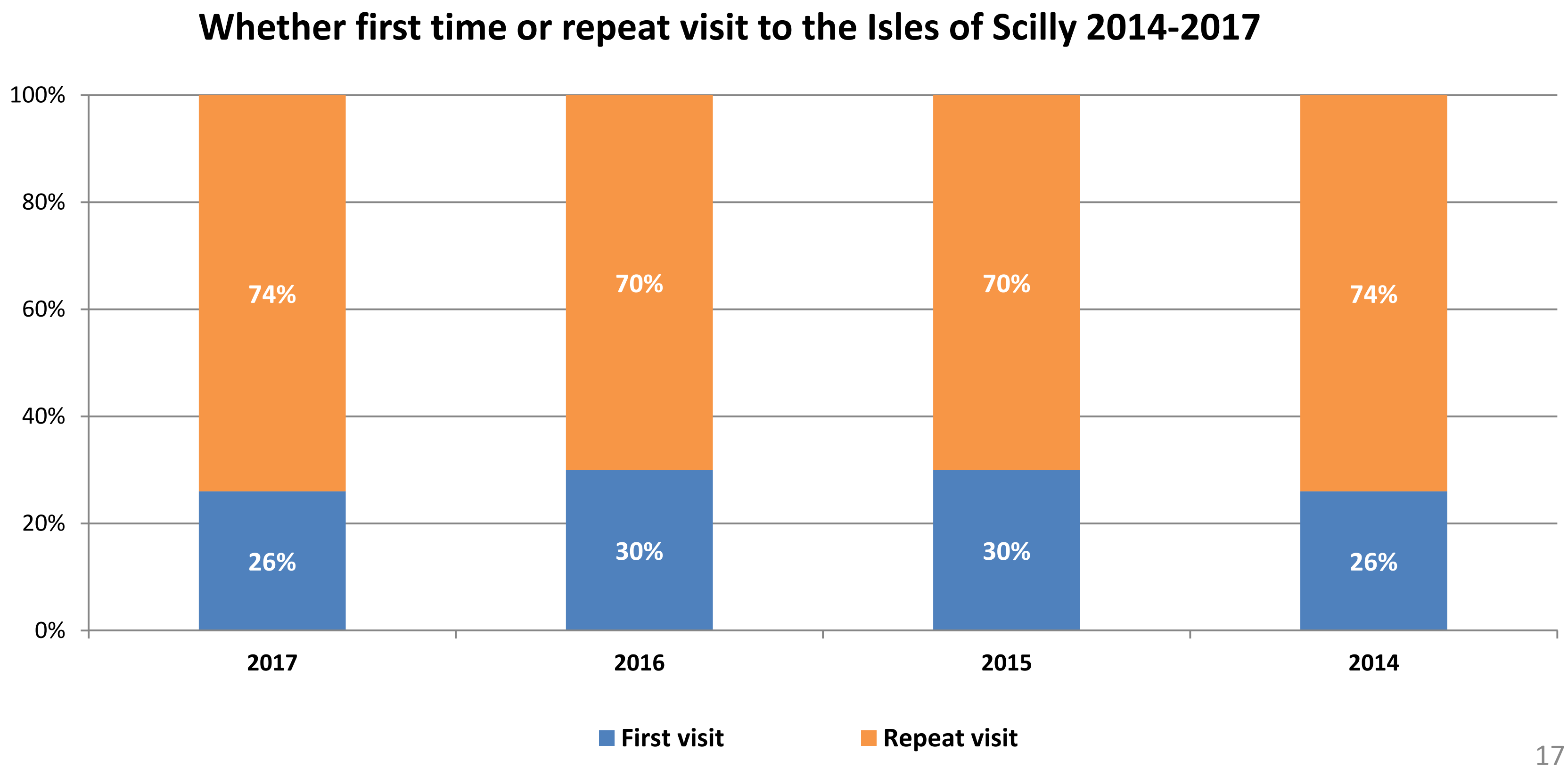
The average number of previous visits to the Islands was 12.71.

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

74% of respondents were on a repeat visit to the Isles of Scilly (70% in each case during 2016 and 2015 and 74% during 2014).

The average number of previous visits to the Islands was 12.71 (10.41 during 2016 and 11.5 during 2015).

The results by analysis segment are shown overleaf.



Base 2,786

Day visitors, those visiting during July to September, short break visitors, those staying on St. Mary's, those arriving by cruise ship and those staying for 2-4 days were the most likely to be on their first ever visit to the Islands.

The proportion of repeat visitors to the Islands was highest amongst those staying overnight on the Islands (76%), those visiting during January to March (83%), those on their main holiday of the year (80%), those staying on Bryher (85%), those arriving by Skybus (78%) and those staying for 8+ days (89%).

46% of day visitors, 27% of those visiting during July to September, 40% of those on a short break, 27% of those staying on St. Mary's, 82% of those arriving by cruise ship and 40% of those staying for 2-4 days were on their first ever visit to the Islands.

Whether first time or previous visitor by analysis segment 2017	First time visitor	Repeat visitor	Whether first time or previous visitor by analysis segment 2017	First time visitor	Repeat visitor
STAYING	24%	76%	**SKYBUS**	22%	78%
DAY	46%	54%	**SCILLONIAN**	29%	71%
JAN-MAR	17%	83%	**PRIVATE**	32%	68%
APR-JUN	25%	75%	**CRUISE**	82%	18%
JUL-SEP	27%	73%	**OTHER TRANSPORT**	23%	77%
OCT-DEC	21%	79%	**2-4 DAYS**	40%	60%
MAIN	20%	80%	**5-7 DAYS**	28%	72%
SECOND	25%	75%	**8+ DAYS**	11%	89%
SHORT	40%	60%			
ST MARY'S	27%	73%			
ST AGNES	24%	76%			
BRYHER	15%	85%			
TRESCO	22%	78%			
ST MARTIN'S	22%	78%			

Base 2,786

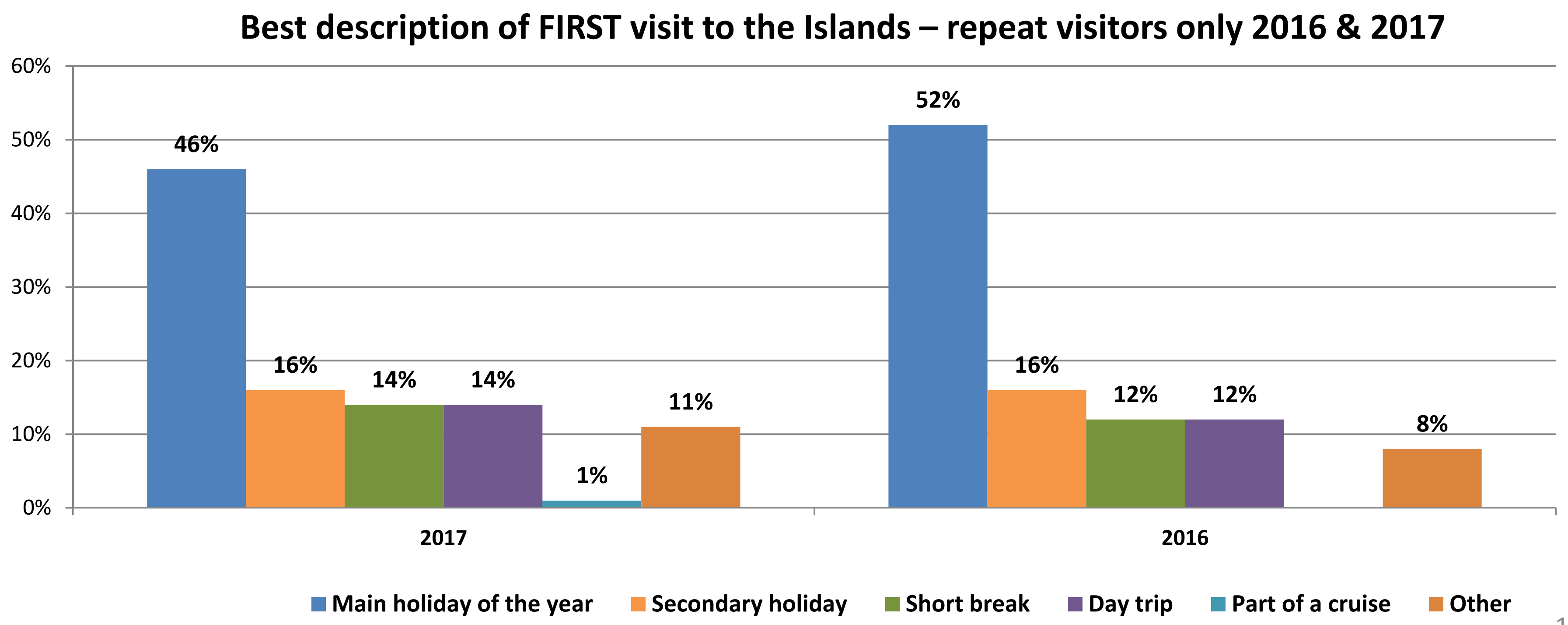
46% of repeat visitors to the Islands described their FIRST ever visit to the Isles of Scilly as being their main holiday of the year.

For the second year running (question was first asked during the 2016 survey) repeat visitors to the Islands were asked to best describe their FIRST ever visit to the Isles of Scilly.

The majority of respondents (46%) said they had visited on their main holiday of the year compared with 52% during 2016.

16% of respondents had first visited the Islands on a secondary holiday (the same proportion as last year), 14% on a short break and the same proportion as part of a day trip (12% in each case during 2016).

There was little variation in the results according to analysis segment.



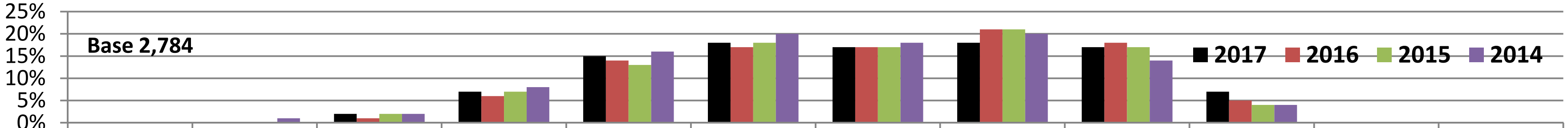
Base 2,049

Characteristics of Visits

The peak months for visits to the Islands were June to September.

The peak months for visits to the Islands were June to September with 18% and 17% of respondents having visited during June and July respectively, 18% in August and 17% in September. There was little variation in the results by each of the analysis segments.

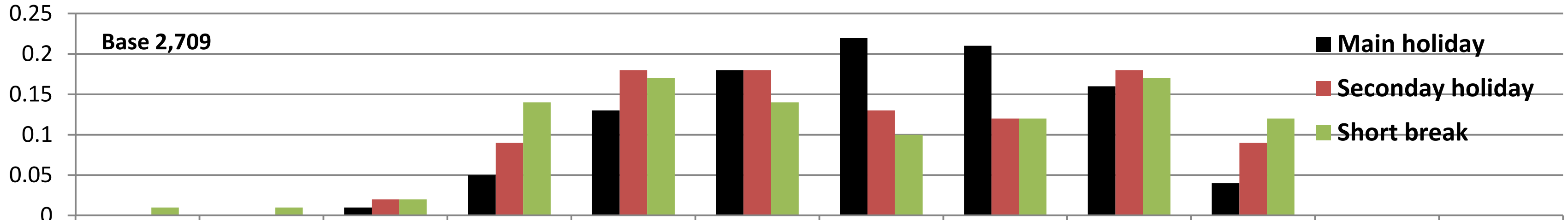
Month of visit 2014-2017



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2017	0%	0%	2%	7%	15%	18%	17%	18%	17%	7%	0%	0%
2016	0%	0%	1%	6%	14%	17%	17%	21%	18%	5%	0%	0%
2015	0%	0%	2%	7%	13%	18%	17%	21%	17%	4%	0%	0%
2014	0%	1%	2%	8%	16%	20%	18%	20%	14%	4%	0%	0%

When the data was further analysed by the 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 (20% and 26% respectively). In contrast, during June a higher proportion of those visitors on their second holiday had visited the Islands (18%). May (18%) and September (21%) are more popular months for short breaks to the Islands.

Month of visit by type of trip 2017



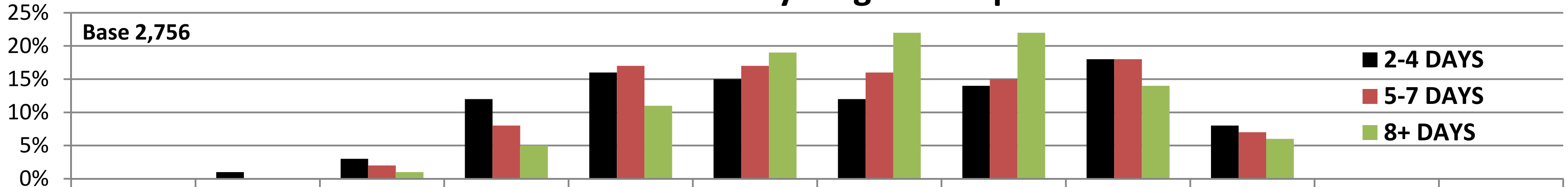
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Main holiday			1%	5%	13%	18%	22%	21%	16%	4%		
Seconday holiday			2%	9%	18%	18%	13%	12%	18%	9%		
Short break	1%	1%	2%	14%	17%	14%	10%	12%	17%	12%		

There was little variation in the results compared with 2014, 2015 or 2016 (see table overleaf) or by each of the analysis segments.

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

The peak months for visits of 2-4 days to the Islands were May (16%) and September (18%), compared with May, June and September for trips of 5-7 days (17% in each case for May and June and 18% for September) and July and August (22% in each case) for trips of 8+ days.

Month of visit by length of trip 2017



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2-4 DAYS		1%	3%	12%	16%	15%	12%	14%	18%	8%		
5-7 DAYS			2%	8%	17%	17%	16%	15%	18%	7%		
8+ DAYS			1%	5%	11%	19%	22%	22%	14%	6%		

Month of visit by year and type of trip 2015-2017

Year	Type of trip	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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%	-	-
2016	Main holiday	-	-	1%	3%	12%	17%	20%	26%	16%	4%	-	-
	Secondary holiday	-	-	2%	9%	16%	18%	14%	11%	21%	7%	-	-
	Short break	1%	1%	2%	8%	18%	13%	12%	14%	21%	10%	1%	-
2017	Main holiday	-	-	1%	5%	13%	18%	22%	21%	16%	4%	-	-
	Secondary holiday	-	-	2%	9%	18%	18%	13%	12%	18%	9%	-	-
	Short break	1%	1%	2%	14%	17%	14%	10%	12%	17%	12%	-	-

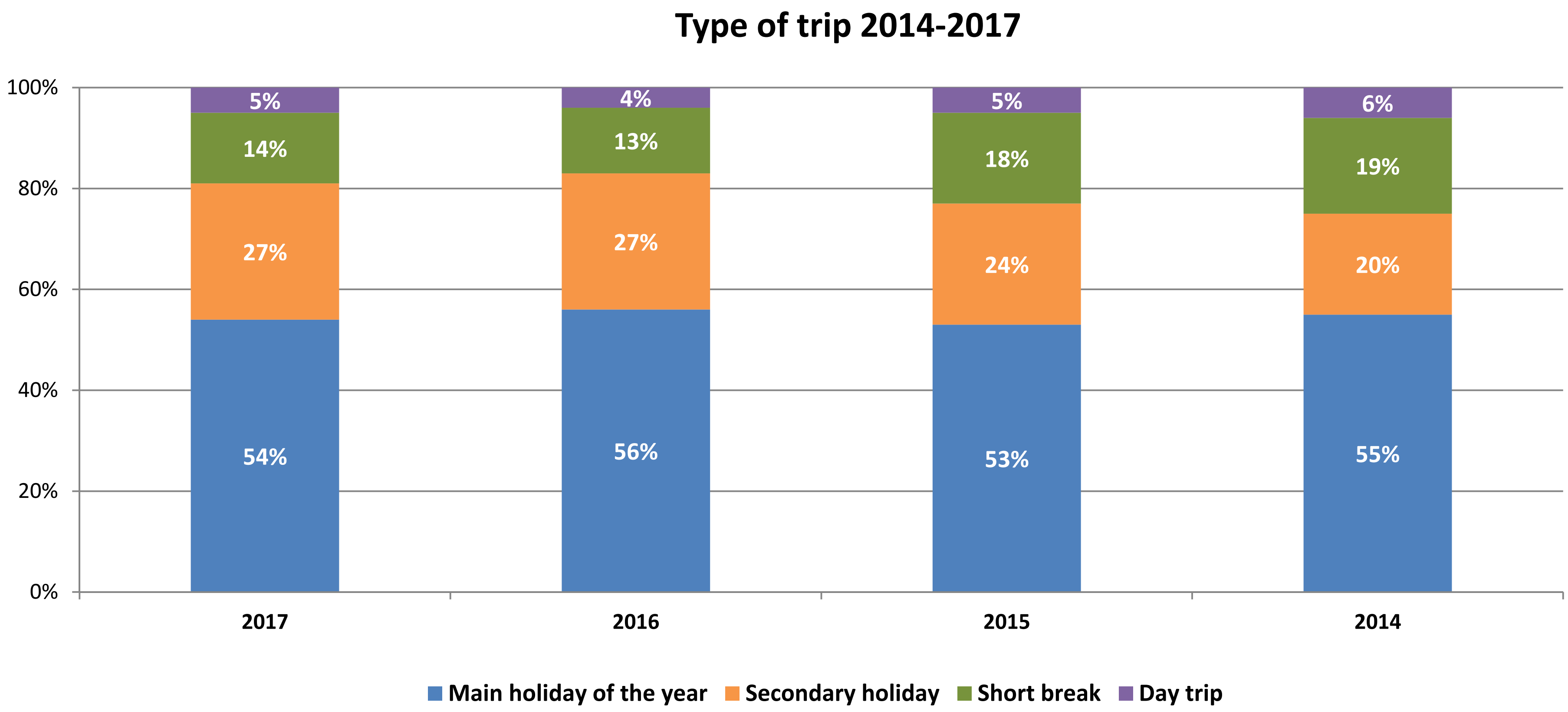
Base 2,709 (2017)

54% of visitors were visiting the Islands on their main holiday of the year.

The majority of respondents (54%) were visiting on their main holiday of the year (56%, 53% and 55% during 2016, 2015 and 2014 respectively).

27% of respondents were on a secondary holiday to the Isles of Scilly (the same proportion as during 2016 and compared with 24% 2015 and 20% 2014). 14% of respondents were on a short break (13%, 18% and 19% during 2016, 2015 and 2014 respectively). 5% were on a day visit (4%, 5% and 6% during 2016, 2015 & 2014 respectively).

The results by analysis segment are provided overleaf.



Base 2,711

Those visiting during the months of July to September, those on a repeat visit, those staying on St. Agnes, those arriving on the Scillonian and those staying for 8+ days were the most likely to be on their main holiday of the year to the Islands.

The highest proportion of visitors on their main holiday of the year to the Islands was amongst those visiting during July to September (62%), those on a repeat visit (58%), those staying on St. Agnes (64%), those arriving on the Scillonian (57%) and those staying for 8+ days (78%).

In terms of those most likely to be on a secondary holiday to the Isles of Scilly, these included 38% of those respondents visiting during the months of October to December, 28% of those on a repeat visit, 33% of those staying on Tresco, 34% of those arriving via other transport and 36% of those staying for between 5 and 7 nights.

Short breaks were most popular amongst those visiting during January to March (30%), first time visitors (22%), those staying on Tresco (15%), those arriving by private transport (24%) and those staying for 2-4 days (63%).

10% of first time visitors to the Islands and 50% of those arriving by cruise ship were on a day trip to the Islands.

Type of trip by analysis segment 2017	Main holiday	Secondary holiday	Short break	Day trip
JAN-MAR	34%	32%	30%	4%
APR-JUN	48%	31%	16%	5%
JUL-SEP	62%	23%	11%	5%
OCT-DEC	34%	38%	24%	4%
FIRST TIME	42%	26%	22%	10%
REPEAT	58%	28%	11%	3%
ST MARY'S	58%	28%	14%	-
ST AGNES	64%	27%	9%	-
BRYHER	63%	27%	10%	-
TRESCO	52%	33%	15%	-
ST MARTIN'S	62%	28%	10%	-

Type of trip by analysis segment 2017	Main holiday	Secondary holiday	Short break	Day trip
SKYBUS	52%	30%	15%	3%
SCILLONIAN	57%	24%	12%	6%
PRIVATE	41%	29%	24%	6%
CRUISE	31%	4%	15%	50%
OTHER TRANSPORT	47%	34%	17%	2%
2-4 DAYS	18%	18%	63%	1%
5-7 DAYS	54%	36%	10%	-
8+ DAYS	78%	21%	1%	-

Base 2,711

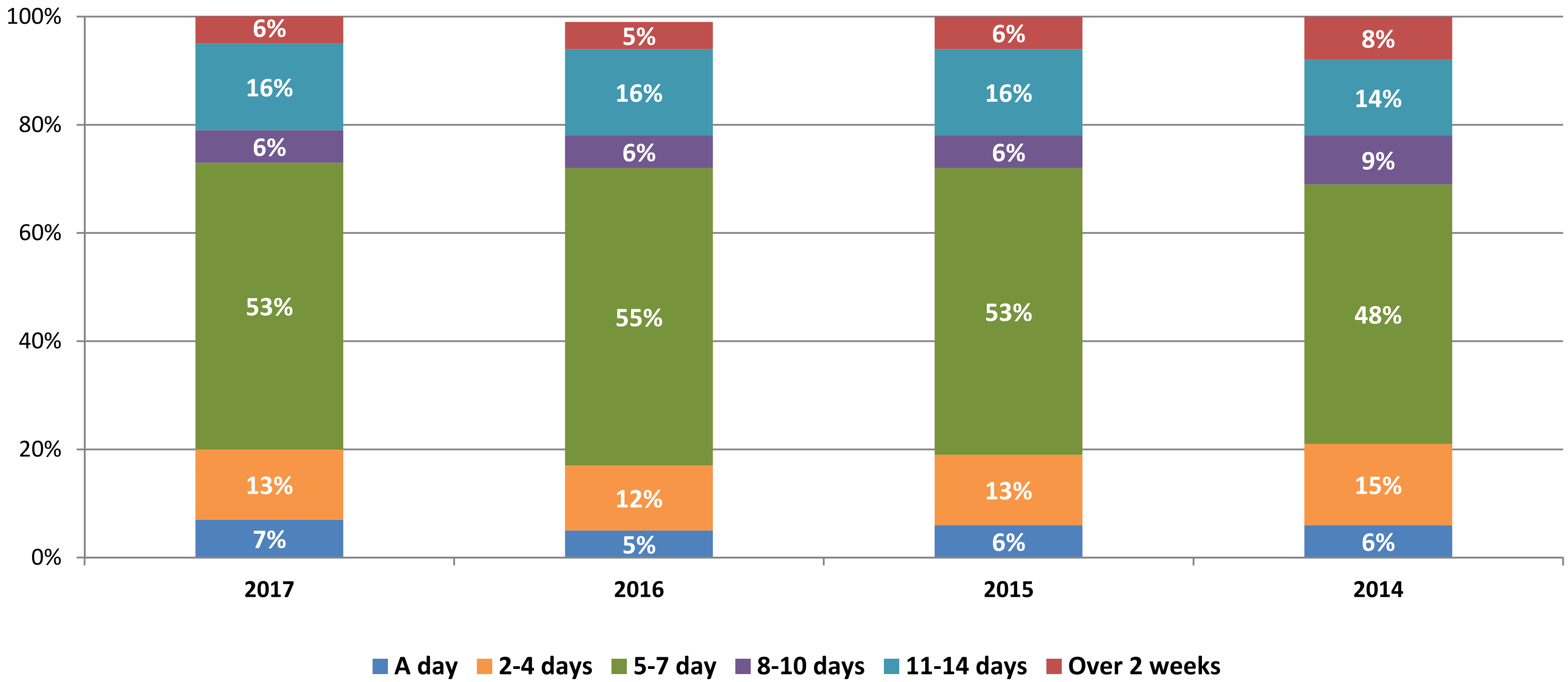
53% of visitors were spending between 5 and 7 days on the Islands.

The largest proportion of respondents were spending between 5 and 7 days on the Islands (53% in 2017, compared with 55%, 53% and 48% during 2016, 2015 and 2014 respectively).

22% of respondents (21% in 2016 and 22% in each case during 2015 and 2014) were spending a longer period on the Islands including 16% between 11-14 days (the same proportion as during 2016 & 2015 and compared with 14% during 2014) and 6% 2 weeks or longer (5%, 6% and 8% during 2016, 2015 and 2014 respectively).

The results by analysis segment are provided overleaf.

Duration of stay 2014-2017



Base 2,758

With the exception of those on a short break or a cruise, the largest proportion of respondents across all the analysis segments were spending between 5 and 7 days on the Islands.

With the exception of those on a short break or on a cruise, the largest proportion of respondents across all the analysis segments were spending between 5 and 7 days on the Islands including 68% of those on a secondary holiday.

25% of visitors to the Islands during July to September, 28% of repeat visitors, 33% who were on their main holiday of the year, 37% of those staying on Bryher, 36% staying on St. Agnes and 33% of those staying on St Martins, along with 25% of respondents who had arrived via an other mode of transport were spending a longer period on the Islands of 11 days or more.

Duration of stay by analysis segment 2017	A day	2-4 days	5-7 days	8-10 days	11-14 days	Over 2 weeks	Duration of stay by analysis segment 2017	A day	2-4 days	5-7 days	8-10 days	11-14 days	Over 2 weeks
JAN-MAR	9%	23%	48%	2%	11%	7%	**ST MARY'S**	2%	14%	55%	7%	17%	5%
APR-JUN	6%	14%	55%	5%	14%	6%	**ST AGNES**	1%	7%	45%	11%	25%	11%
JUL-SEP	7%	11%	50%	7%	19%	6%	**BRYHER**	1%	9%	47%	8%	26%	11%
OCT-DEC	5%	17%	55%	9%	10%	5%	**TRESCO**	2%	12%	52%	9%	17%	8%
FIRST TIME	12%	20%	57%	6%	5%	1%	**ST MARTIN'S**	1%	9%	50%	7%	19%	14%
REPEAT	5%	10%	52%	6%	20%	8%	**SKYBUS**	3%	14%	54%	6%	16%	6%
MAIN	2%	4%	54%	7%	24%	9%	**SCILLONIAN**	8%	11%	52%	6%	17%	6%
SECOND	2%	9%	68%	7%	11%	3%	**PRIVATE**	6%	24%	52%	9%	-	9%
SHORT	3%	58%	37%	1%	1%	-	**CRUISE**	81%	12%	4%	-	4%	-
							OTHER TRANSPORT	4%	14%	50%	7%	17%	8%

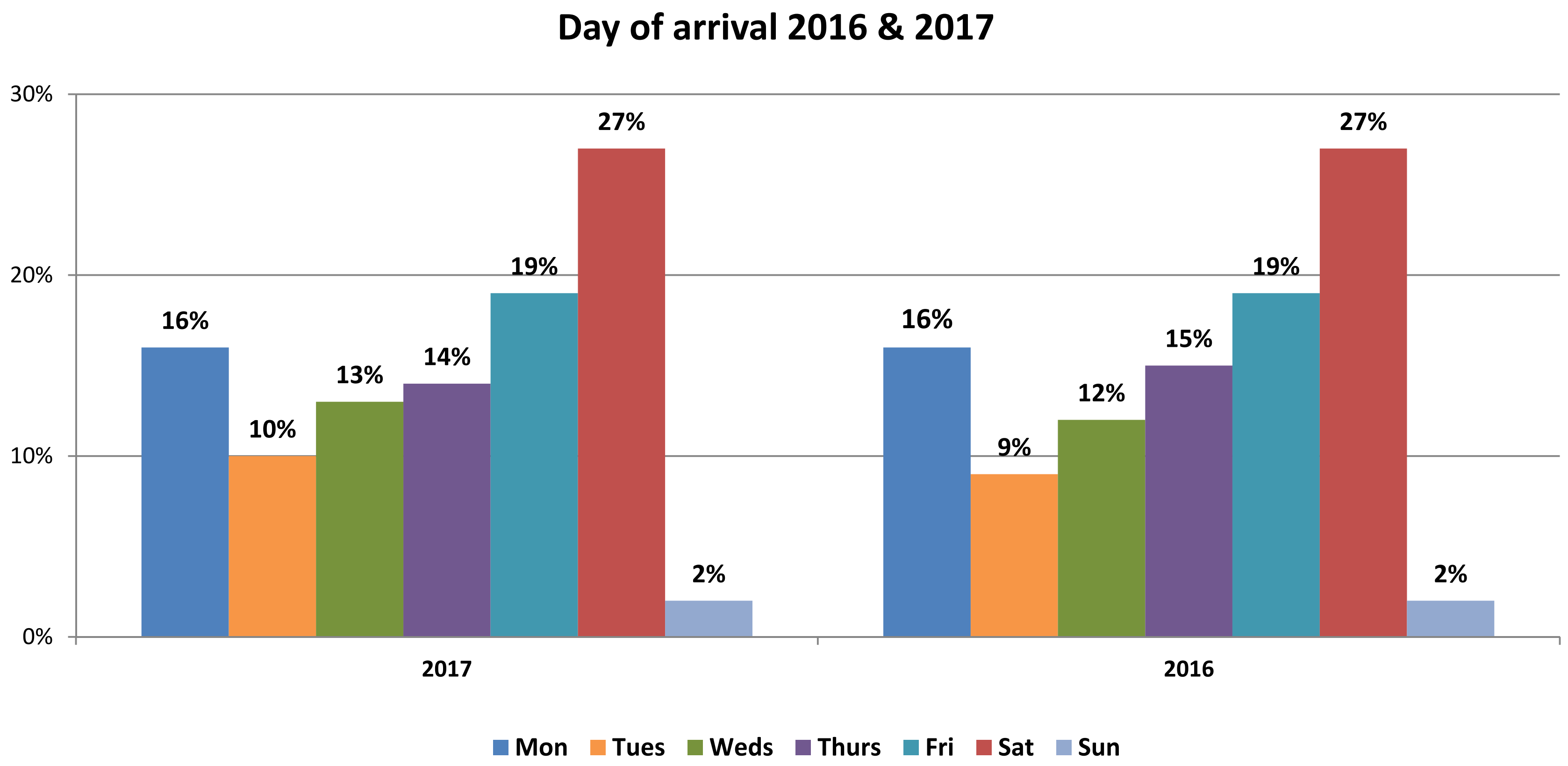
Base 2,758

The largest proportion of respondents arrived on the Islands on a Saturday (27%) and a further 19% on a Friday.

The largest proportion of respondents arrived on the Islands on a Saturday (27%) and a further 19% on a Friday.

16% of respondents arrived on a Monday, 14% on a Thursday, 13% on a Wednesday and 10% on a Tuesday. Just 2% arrived on a Sunday.

There was virtually no change in the results year on year. The results by analysis segment are provided overleaf.



Base 2,515

With the exception of those who visited the Islands during January to March, those on a short break, those who arrived on private transport or on a cruise ship and those who stayed for 2-4 days, the largest proportion of visitors across all the other analysis segments had arrived on the Islands on a Saturday.

On the whole, the largest proportion of visitors across all the other analysis segments had arrived on the Islands on a Saturday.

The only exceptions were those visiting during January to March, those on a short break, those arriving by private transport or on a cruise ship and those staying 2-4 days - the largest proportion of whom in each case had arrived on a Monday or a Friday.

Day of arrival by analysis segment 2017	Mon	Tues	Weds	Thurs	Fri	Sat	Sun	Type of trip by analysis segment 2017	Mon	Tues	Weds	Thurs	Fri	Sat	Sun
JAN-MAR	30%	14%	12%	8%	20%	16%	-	**BRYHER**	14%	13%	13%	10%	18%	31%	1%
APR-JUN	16%	9%	13%	14%	19%	27%	1%	**TRESCO**	17%	14%	13%	16%	17%	23%	1%
JUL-SEP	15%	11%	13%	14%	18%	26%	3%	**ST MARTIN'S**	11%	10%	13%	13%	18%	33%	3%
OCT-DEC	13%	12%	14%	7%	26%	29%	-	**SKYBUS**	16%	12%	12%	16%	19%	25%	1%
FIRST TIME	19%	11%	11%	13%	19%	22%	4%	**SCILLONIAN**	15%	9%	14%	11%	20%	29%	3%
REPEAT	14%	10%	14%	14%	19%	22%	4%	**PRIVATE**	25%	19%	9%	13%	9%	19%	6%
MAIN	14%	9%	15%	14%	17%	30%	1%	**CRUISE**	23%	-	8%	15%	38%	15%	-
SECOND	16%	12%	11%	13%	20%	27%	2%	**OTHER TRANSPORT**	16%	15%	12%	15%	13%	26%	4%
SHORT	21%	13%	12%	13%	23%	14%	3%	**2-4 DAYS**	22%	18%	12%	11%	24%	12%	1%
ST MARY'S	16%	10%	13%	14%	18%	26%	2%	**5-7 DAYS**	15%	9%	13%	13%	19%	29%	2%
ST AGNES	15%	12%	9%	15%	21%	26%	1%	**8+ DAYS**	14%	9%	14%	16%	17%	30%	1%

Base 2,154

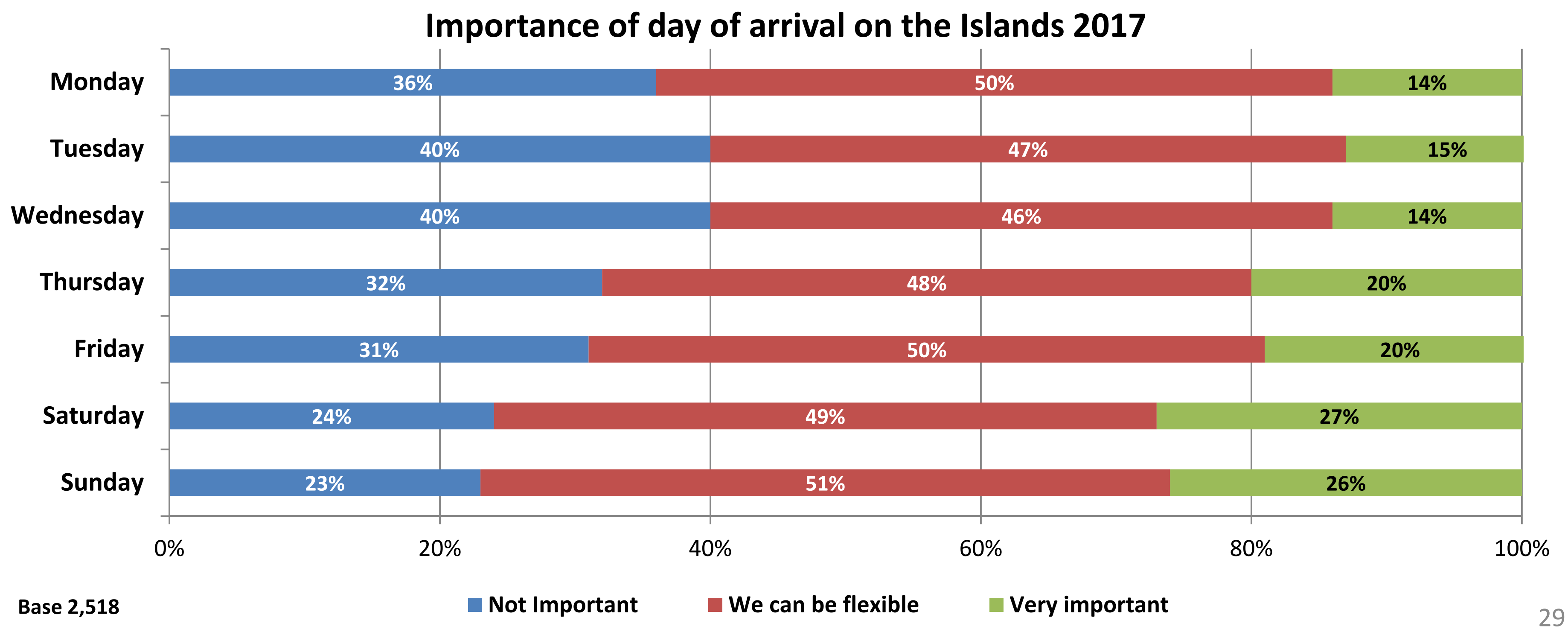
27% of visitors said it was very important that they arrived on the Islands on a Saturday, whilst 26% said the same about a Sunday.

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

27% of visitors who arrived on a Saturday said it was very important that they did so (30% 2016), as was it for 26% of respondents who arrived on a Sunday (22% 2016).

The largest proportion of respondents in each case (46%-51%) said they could be flexible about which day they arrived. 40% of visitors in each case arriving on a Tuesday and Wednesday said it was not important to them which day of the week they arrived, along with 36% arriving on a Monday.

There was little variation in the results according to the analysis segments.



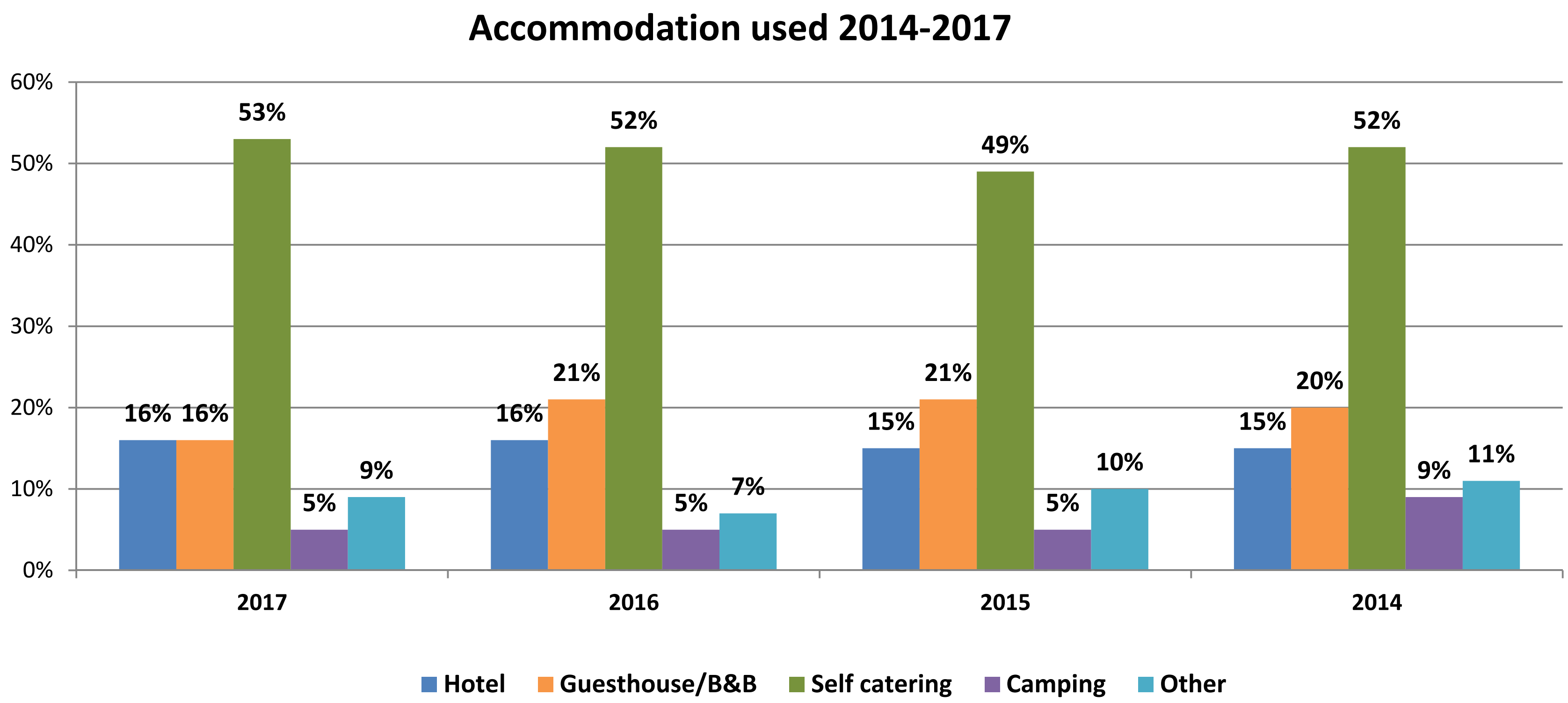
Base 2,518

53% of respondents were staying in self-catering accommodation on the Islands whilst a further 32% were staying in a hotel or B&B/guest house.

53% of respondents were staying in self-catering accommodation on the Islands (52%, 49% and 52% during 2016, 2015 and 2014 respectively) whilst a further 32% (37% 2016, 36% 2015 and 35% 2014) were staying in a hotel or B&B/guest house (16% in each case).

Just 5% of respondents were camping during their visit (the same proportion as during 2016 & 2015 and compared with 9% during 2014) whilst 9% had used other types of accommodation including staying with friends/family (5%) or on a yacht/cruise ship (1%). For a full list of the 'other' types of accommodation used by visitors staying overnight on the Islands please refer to the appendices which accompany this report.

The results by analysis segment are provided overleaf.



Base 2,524 Please note that multiple responses were provided for this question.

52% of first time visitors, 67% of those on a short break and 70% staying for 2-4 days used serviced accommodation on the Islands.

52% of first time visitors, 67% of those on a short break and 70% staying for 2-4 days used serviced accommodation on the Islands.

With the exception of those arriving on private transport or on a cruise ship (the largest proportion of whom were staying in another type of accommodation), the largest proportion of respondents amongst all the other analysis segments were using self catering accommodation.

17% of visitors staying on St. Agnes were camping.

Accommodation used by analysis segment 2017	Hotel	Guesthouse /B&B	Self catering	Camping	Other
JAN-MAR	24%	8%	52%	2%	14%
APR-JUN	18%	17%	53%	4%	8%
JUL-SEP	14%	16%	54%	8%	8%
OCT-DEC	21%	15%	55%	-	9%
FIRST TIME	25%	27%	36%	7%	5%
REPEAT	13%	13%	59%	5%	9%
MAIN	10%	14%	62%	7%	8%
SECOND	17%	15%	55%	3%	10%
SHORT	40%	27%	17%	5%	10%
ST MARY'S	16%	19%	53%	4%	8%
ST AGNES	6%	16%	54%	17%	11%
BRYHER	20%	11%	51%	11%	10%
TRESCO	15%	9%	57%	4%	17%
ST MARTIN'S	17%	10%	50%	13%	11%

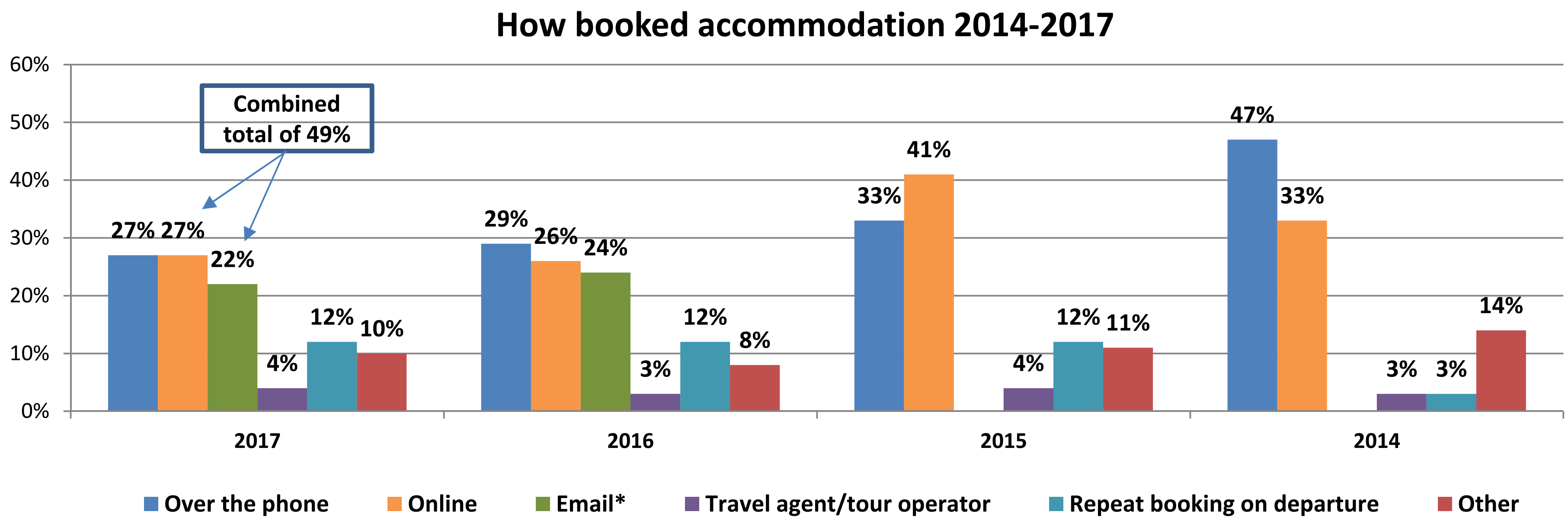
Accommodation used by analysis segment 2017	Hotel	Guesthouse /B&B	Self catering	Camping	Other
SKYBUS	21%	16%	52%	2%	9%
SCILLONIAN	12%	16%	56%	10%	6%
PRIVATE	9%	16%	22%	3%	50%
CRUISE	23%	8%	15%	-	54%
OTHER TRANSPORT	19%	18%	50%	2%	10%
2-4 DAYS	40%	30%	16%	6%	7%
5-7 DAYS	16%	15%	59%	5%	6%
8+ DAYS	6%	12%	62%	9%	12%

Base 2,524 Please note that multiple responses were provided for this question.

27% of respondents in each case booked their accommodation over the phone or online and 22% booked via email.

27% of respondents booked their accommodation over the phone (29%, 33% and 47% during 2016, 2015 and 2014 respectively), the same proportion booked online (26% during 2016, 41% during 2015 and 33% during 2014) and 22% booked via email (24% 2016). Please note however, that booking accommodation via email was not a specified option provided during the 2015 and 2014 surveys and any respondents booking via email during these survey years would have been likely to choose the booked online option instead – 41% during the 2015 survey and 33% during the 2014 survey. These proportions compare with the combined 49% of respondents (27% online and 22% via email) doing so during the 2017 survey and 50% for whom this was the case during the 2016 survey (26% online and 24% via email).

12% of respondents booked during their last visit (the same proportion as during the 2016 and 2015 surveys and compared with 3% during 2014) and 4% booked through a travel agent or tour operator (3%, 4% and 3% during 2016, 2015 and 2014 respectively). There was little variation in the results by analysis segment. To see the full list of 'other' ways in which respondents had booked their accommodation (10%) please see the appendices which accompany this report.



Base 2,522. * Via 'Email' option not specified during the 2015 & 2014 surveys.

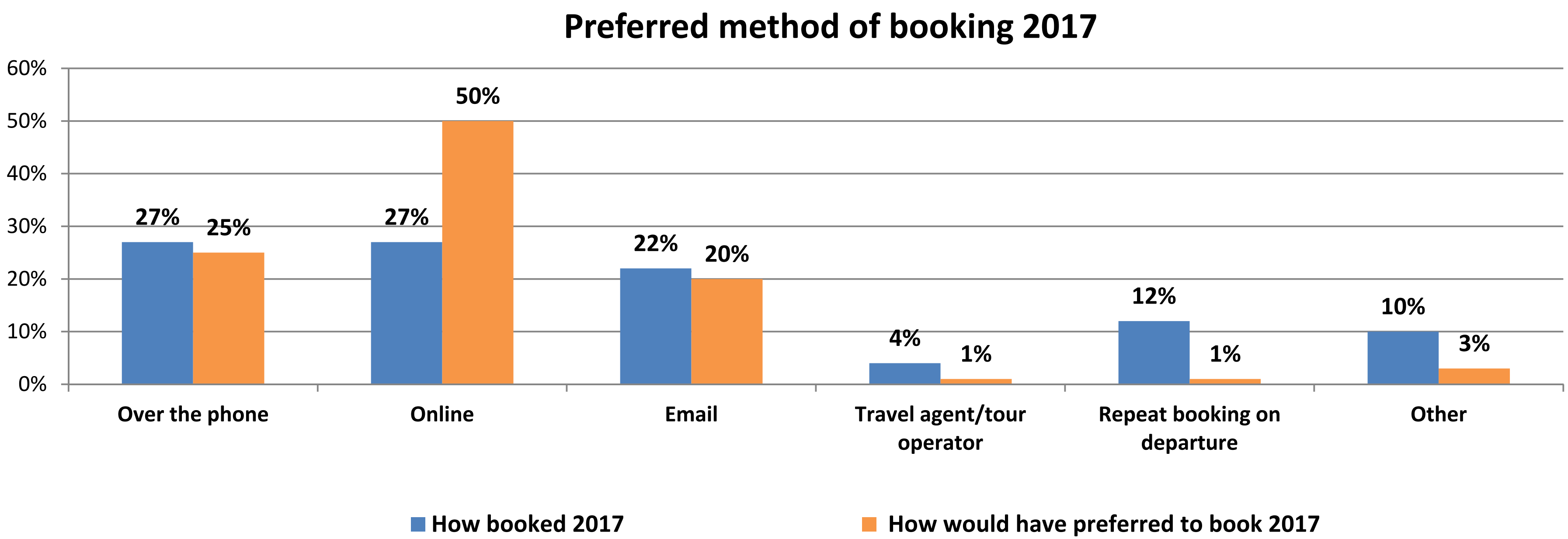
50% of respondents would have preferred to book online had the option been available to them compared with the 27% of respondents who actually did so.

When asked if all booking options had been available to them, which they would have preferred to use, 50% of respondents would have preferred to do so online, compared with the 27% who actually did so (47% and 29% respectively during the 2016 survey).

25% of respondents would have preferred to book over the phone compared with the 27% who actually did so (26% in each case during 2016) and 20% would have preferred to book via email, compared with the 22% who actually did so (21% and 24% respectively during 2016).

Only 1% would have preferred to make a repeat booking on their departure, compared with the 12% who actually did so and the same proportion would have preferred to book with a travel agent/tour operator compared with the 4% who actually did so.

There was little variation in the results by analysis segment. There is no comparable data available for the 2015 and 2014 surveys.



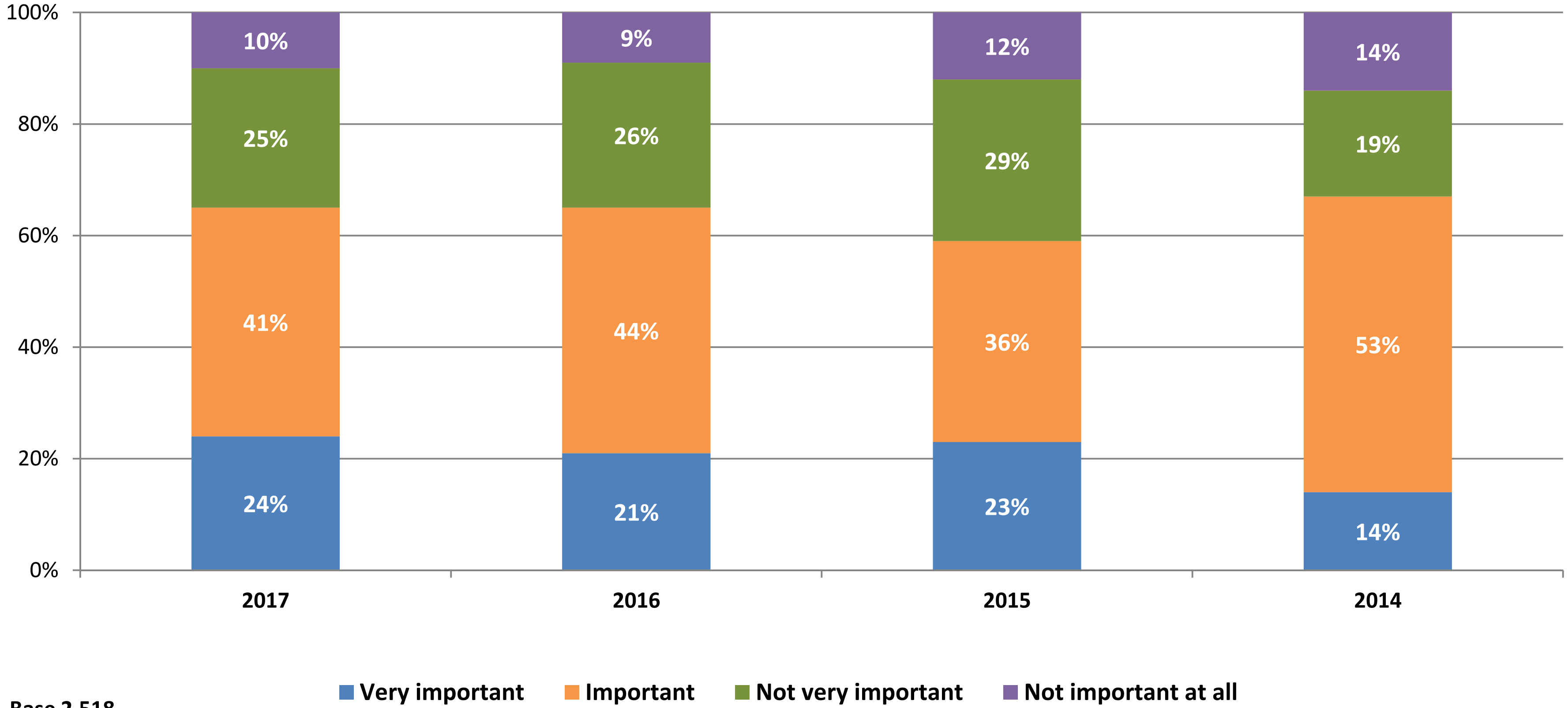
Base 2,523. Question not asked during the 2015 & 2014 surveys.

65% of respondents felt if was ‘very important’ or ‘important’ that their accommodation on the Islands had a quality (star) rating.

65% of respondents felt it was ‘very important’ (24%) or ‘important’ (41%) that their accommodation on the Islands had a quality (star) rating, the same proportion as last year and compared with 59% and 67% during the 2015 and 2014 surveys respectively.

There was little variation in the results by analysis segment.

Importance of accommodation having a quality (star) rating 2014-2017



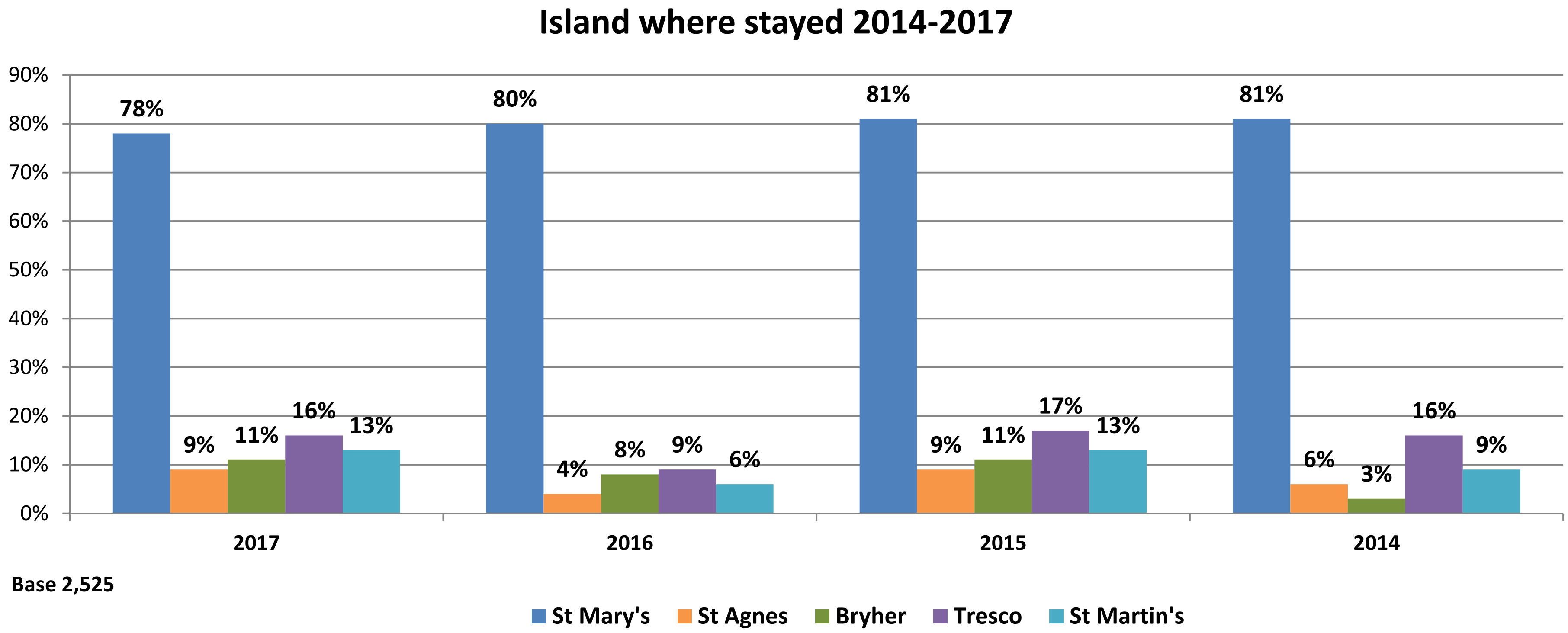
Base 2,518

78% of respondents had stayed on St. Mary's.

78% of respondents had stayed on St. Mary's during their visit to the Islands compared with 80% during 2016 and 81% in each case during 2015 and 2014.

16% of respondents had stayed on Tresco (9% 2016, 17% 2015 and 16% 2014), 13% on St Martin’s (6% 2016, 13% 2015 and 9% 2014), 11% on Bryher (8%, 11% and 3% during 2016, 2015 and 2014 respectively) and 9% on St. Agnes (4%, 9% and 6% during 2016, 2015 and 2014 respectively).

There was little variation in the results by analysis segment.



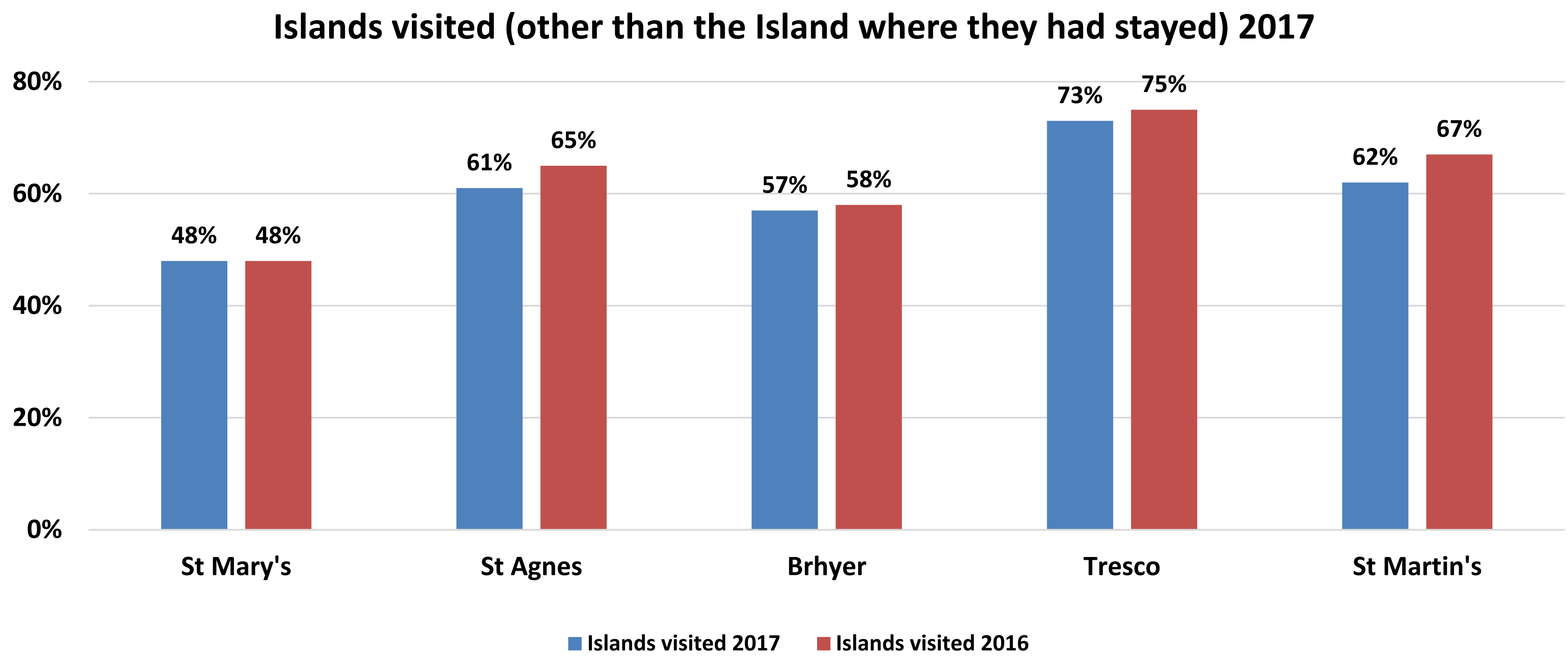
Please note that the results in the chart above do not sum to 100% due to this question being a multiple response question e.g. visitors could have stayed on more than one island during their visit to the Isles of Scilly.

Other than the island where they had stayed, 73% of respondents had visited Tresco, 62% St. Martin's and 61% St. Agnes.

Respondents were asked which islands they had visited other than the island they had stayed on.

73% of respondents had visited Tresco during their visit to the Islands (75% 2016), 62% had visited St. Martin's (67% 2016) and 61% St. Agnes (65% 2016). 57% had visited Bryher (58% 2016) and 48% St. Mary's, the same proportion as during 2016 (78% had stayed on St Mary's during 2017).

The results by analysis segment are shown overleaf. There is no comparable data available for the 2015 or 2014 surveys.



Base 2,324

Excluding the island they had stayed on 79% of respondents staying on St. Mary's had visited Tresco. 84% of respondents staying on St. Agnes had visited St. Mary's, along with 83% of those staying on St. Martin's and 77% of respondents in each case staying on Bryher and Tresco.

Excluding the island they had stayed on, 79% of respondents staying on St. Mary's had visited Tresco.

84% of respondents staying on St. Agnes had visited St. Mary's, along with 83% of those staying on St. Martin's and 77% in each case staying on Bryher and Tresco.

Island where stayed 2017	Islands visited (excluding the island where stayed) 2017				
	ST MARY'S	ST AGNES	BRYHER	TRESCO	ST MARTINS
ST. MARY'S	-	68%	60%	79%	69%
ST. AGNES	84%	-	29%	38%	32%
BRYHER	77%	34%	-	60%	39%
TRESCO	77%	34%	53%	-	36%
ST. MARTIN'S	83%	27%	33%	48%	-

Base 2,324

Motivations & Information Sourcing

The scenery and/or peace & quiet (86% and 80% respectively) inspired the largest proportions of respondents to visit the Islands.

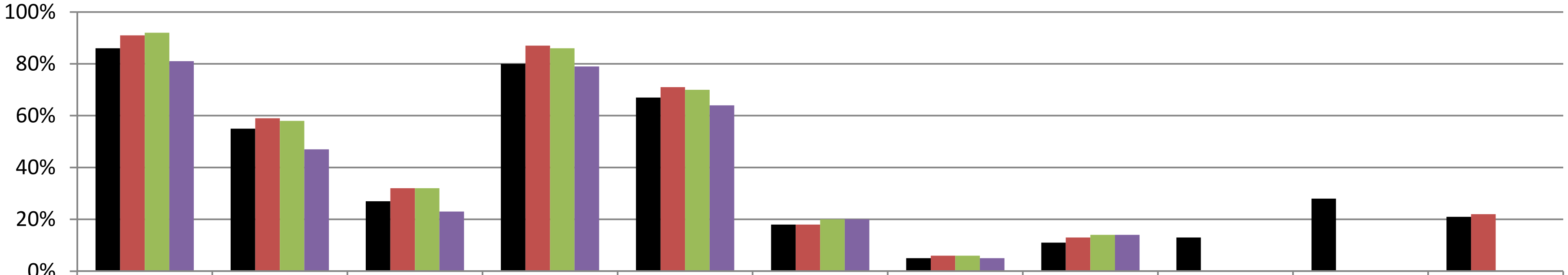
Survey respondents were asked what inspired them to visit the Isles of Scilly. The scenery (86%, compared with 91%, 92% and 81% during 2016, 2015 and 2014 respectively) and/or the peace & quiet (80%, compared with 87%, 86% and 79% during 2016, 2015 & 2014 respectively) inspired the largest proportions of respondents to visit the Islands. 67% were inspired to visit by the beaches (71%, 70% and 64% during 2016, 2015 and 2014 respectively) and 55% by the wildlife (compared with 59%, 58% and 47% during 2016, 2015 and 2014 respectively).

27% said the history of the Isles of Scilly (32% in each case during 2016 & 2015 and 23% during 2014) and 18% said their friends or relatives who live on the Islands (the same proportion as during 2016 and compared with 20% in each case during 2015 and 2014).

21% of respondents mentioned other reasons which inspired them to visit the Islands and to see the full list of responses please see the appendices which accompany this report.

A breakdown of the results by each of the analysis segments 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.

What inspired visit to the Isles of Scilly 2014-2017



	Scenery	Wildlife	History	Peace and quiet	Beaches	Friends or relatives	Event/festival	Child friendly location	Local arts & culture*	Local food & drink*	Other
2017	86%	55%	27%	80%	67%	18%	5%	11%	13%	28%	21%
2016	91%	59%	32%	87%	71%	18%	6%	13%			22%
2015	92%	58%	32%	86%	70%	20%	6%	14%			
2014	81%	47%	23%	79%	64%	20%	5%	14%			

Base 2,714. * Included for the first time during the 2017 survey.

86% of first time visitors were inspired to visit the Islands because of the scenery, 71% by the peace & quiet, 61% by the beaches and 50% by the wildlife.

	STAYING	DAY	JAN-MAR	APR-JUN	JUL-SEPT	OCT-DEC	FIRST TIME	REPEAT	MAIN	SECOND	SHORT	2-4 DAYS	5-7 DAYS	8+ DAYS
Scenery	87%	74%	80%	86%	87%	82%	86%	86%	89%	86%	78%	80%	88%	87%
Peace & Quiet	81%	56%	75%	81%	79%	75%	71%	83%	85%	79%	66%	70%	81%	86%
History	27%	28%	39%	28%	25%	27%	26%	27%	29%	24%	22%	22%	27%	28%
Local arts and culture	13%	9%	13%	13%	13%	8%	11%	14%	15%	11%	9%	9%	13%	15%
Event/Festival	5%	2%	-	7%	4%	8%	5%	5%	5%	5%	8%	6%	5%	4%
Beaches	67%	54%	57%	65%	70%	50%	61%	69%	73%	64%	51%	54%	69%	71%
Friends/Relatives	19%	9%	23%	17%	19%	15%	13%	20%	18%	19%	18%	17%	18%	22%
Wildlife	56%	36%	57%	55%	53%	65%	50%	57%	60%	56%	43%	47%	58%	58%
Child Friendly	12%	6%	5%	7%	15%	5%	4%	14%	15%	9%	3%	4%	11%	17%
Local food and drink	28%	19%	39%	26%	28%	24%	20%	30%	30%	26%	22%	23%	28%	30%
Other	21%	27%	30%	21%	20%	23%	25%	20%	19%	20%	30%	28%	20%	18%

Analysis segment ranking the individual factor the highest

The largest proportion of visitors (45%) had first heard about the Isles of Scilly from a previous visit and/or 23% from a personal recommendation.

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

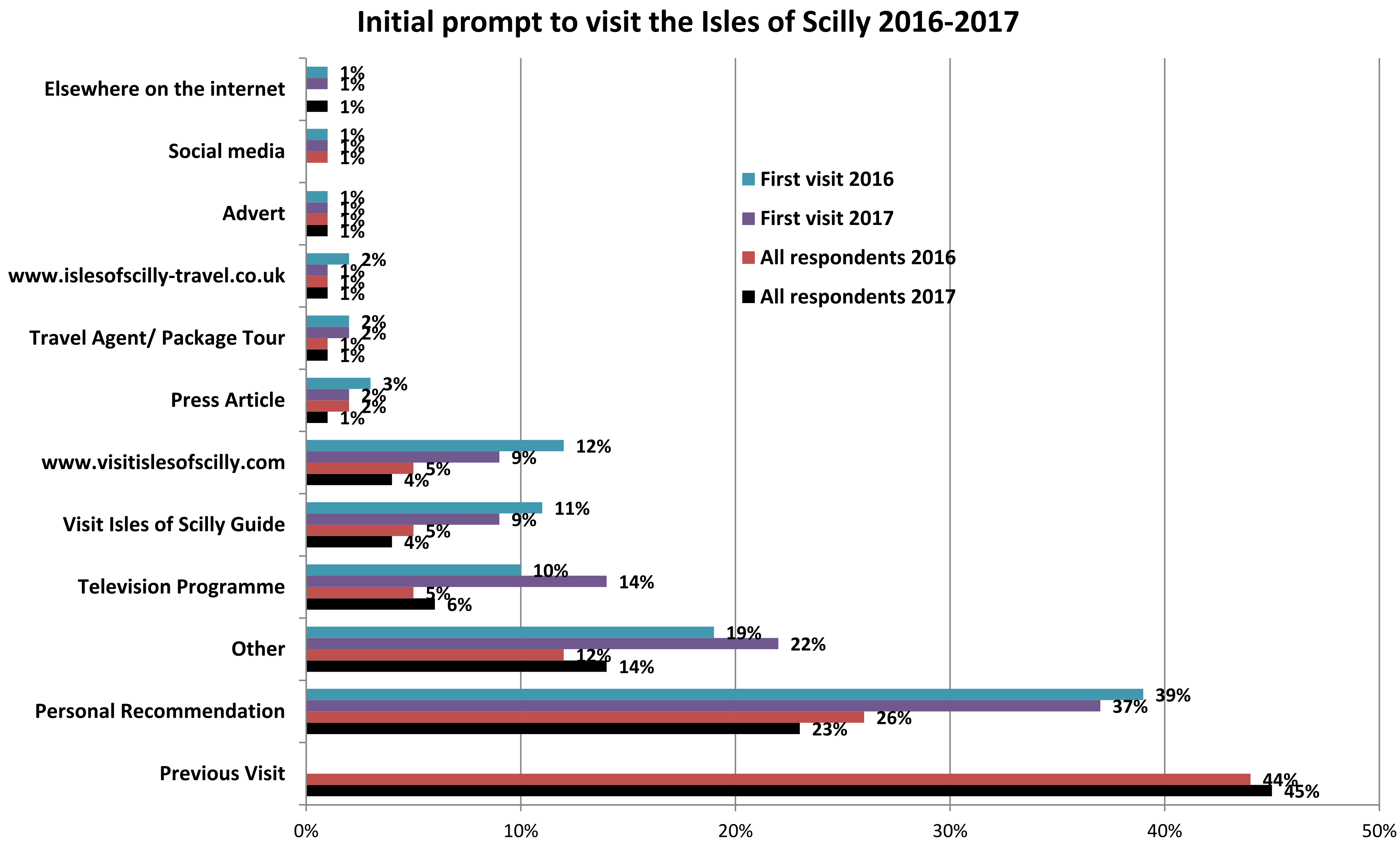
As the graph overleaf illustrates, 45% of respondents said from a previous visit (44% 2016) and 23% from a personal recommendation (26% 2016), including 37% of first time visitors (39% 2016).

9% of first time visitors had initially been prompted to visit by the www.visitislesofscilly.com website (12% 2016) and the same proportion by the Visit Isles of Scilly Guide (11% 2016). 14% of first time visitors to the Islands had initially been prompted to visit by a television programme (10% 2016).

The results by segment are shown on page 43. There was little variation in the results according to the Island which respondents had stayed on or by transport used.

To see where else on the internet respondents had first heard about the Islands (18 respondents), the social media sites used (11 respondents) and the full list of the other information sources used please refer to the appendices which accompany his report.

9% of first time visitors in each case had initially been prompted to visit by the www.visitislesofscilly.com website and/or by the Visit Isles of Scilly Guide. 14% had initially been prompted to visit by a television programme.



Base 2,704

59% of repeat visitors were initially prompted to visit by their previous visit to the Islands.

37% of first time visitors were initially prompted to visit by a personal recommendation.

	STAYING	DAY	JAN-MAR	APR-JUN	JUL-SEPT	OCT-DEC	FIRST TIME	REPEAT	MAIN	SECOND	SHORT	2-4 DAYS	5-7 DAYS	8+ DAYS
Previous visit	46%	30%	46%	44%	45%	44%	2%	59%	49%	45%	32%	30%	45%	54%
Personal Recommendation	23%	19%	18%	23%	23%	22%	37%	18%	22%	24%	25%	23%	25%	20%
Other	14%	19%	16%	12%	15%	15%	22%	11%	11%	14%	23%	23%	13%	11%
Television Programme	6%	8%	5%	6%	6%	6%	14%	3%	6%	5%	5%	7%	6%	5%
Visit Isles of Scilly Guide	4%	9%	2%	5%	4%	3%	9%	3%	4%	5%	5%	5%	5%	3%
www.visitislesofscilly.com	3%	7%	5%	4%	3%	4%	9%	2%	3%	3%	6%	8%	3%	2%
Press Article	1%	1%	5%	1%	1%	1%	2%	1%	2%	1%	1%	2%	1%	2%
Advert	1%	1%	-	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
www.islesofscilly-travel.co.uk	1%	3%	-	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	-
Elsewhere on the internet	1%	1%	-	1%	1%	1%	1%	-	1%	1%	1%	1%	1%	1%
Travel Agent/Package Tour	-	2%	-	-	1%	2%	2%	-	1%	-	1%	1%	-	-
Social media	-	1%	2%	-	1%	-	1%	-	-	1%	1%	1%	-	-
Radio	-	1%	-	-	-	-	-	-	-	-	-	-	-	-

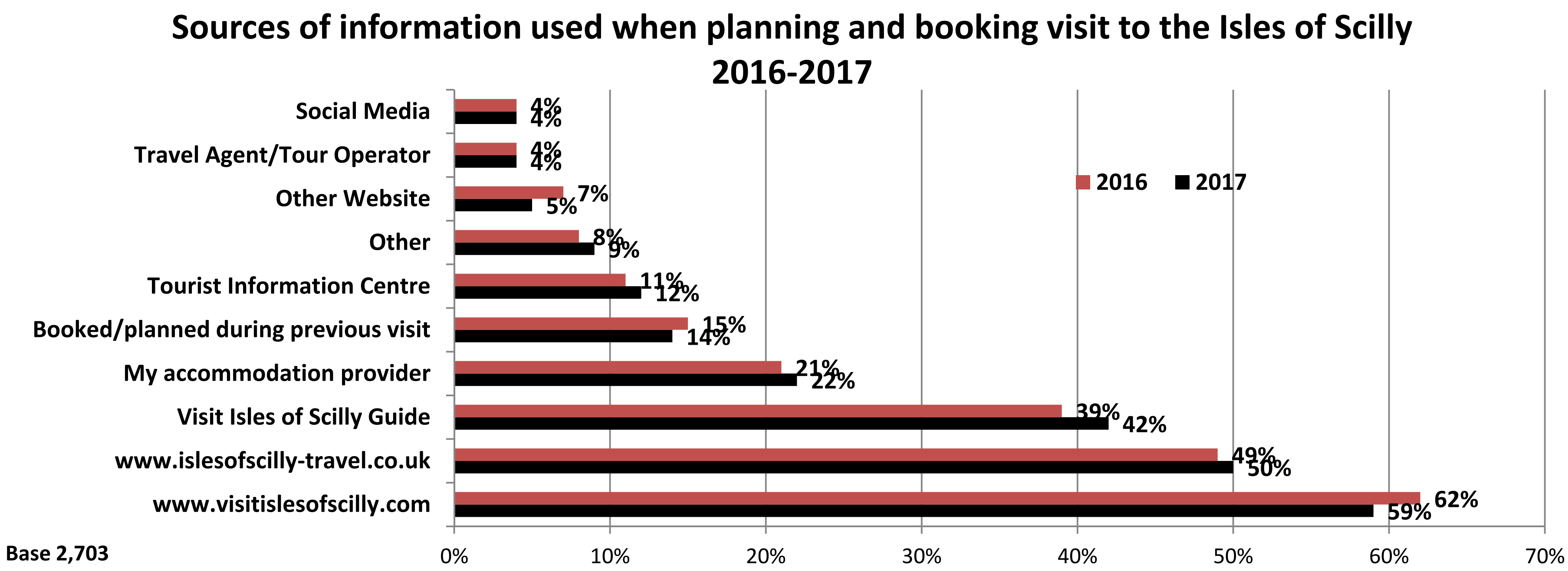
Analysis segment ranking the individual factor the highest

The www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites had been used by 59% and 50% of respondents respectively when planning and booking their visit to the Isles of Scilly.

Respondents were asked what information sources they had used when planning and booking their visit to the Isles of Scilly. The www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites had been used by 59% and 50% of respondents respectively (62% and 49% during 2016 respectively).

42% of respondents had used the Visit Isles of Scilly guide (39% 2016) whilst 22% said they had sourced information from their accommodation provider (21% 2016).

The results by segment are shown overleaf. There was little variation in the results according to the Island which respondents had stayed on or by transport used. To see the list of other websites used (5%), the social media sites used (4%) and the full list of the other information sources used to plan and book please refer to the appendices which accompany his report.



The www.visitislesofscilly.com website was used by 59% and 75% of staying and first time visitors respectively when planning and booking their visit to the Islands. The www.islesofscilly-travel.co.uk website was used by 51% of staying and repeat visitors in each case. 42% of staying visitors had used the Visit Isles of Scilly Guide along with 58% of first time visitors to the Islands.

	STAYING	DAY	JAN-MAR	APR-JUN	JUL-SEPT	OCT-DEC	FIRST TIME	REPEAT	MAIN	SECOND	SHORT	2-4 DAYS	5-7 DAYS	8+ DAYS
www.visitislesofscilly.com	59%	47%	63%	57%	60%	56%	75%	53%	59%	60%	60%	67%	65%	46%
www.islesofscilly-travel.co.uk	51%	43%	59%	47%	52%	49%	47%	51%	54%	49%	42%	45%	52%	51%
Visit Isles of Scilly Guide	42%	35%	39%	42%	42%	39%	58%	36%	43%	43%	38%	44%	46%	34%
My accommodation provider	23%	6%	30%	23%	21%	21%	13%	25%	25%	22%	19%	19%	22%	27%
Booked/planned during previous visit	15%	3%	11%	15%	15%	10%	1%	19%	19%	13%	4%	4%	11%	28%
Tourist Information Centre	12%	15%	11%	12%	12%	11%	14%	11%	11%	13%	13%	12%	12%	12%
Other	9%	11%	18%	10%	8%	14%	10%	9%	8%	9%	16%	13%	9%	9%
Other website	5%	3%	9%	5%	5%	5%	6%	5%	5%	6%	6%	6%	6%	5%
Travel Agent/Tour Operator	4%	10%	-	5%	4%	3%	9%	3%	3%	4%	8%	6%	4%	1%
Social media	4%	8%	5%	3%	5%	3%	4%	4%	4%	4%	4%	3%	4%	4%

Analysis segment ranking the individual factor the highest

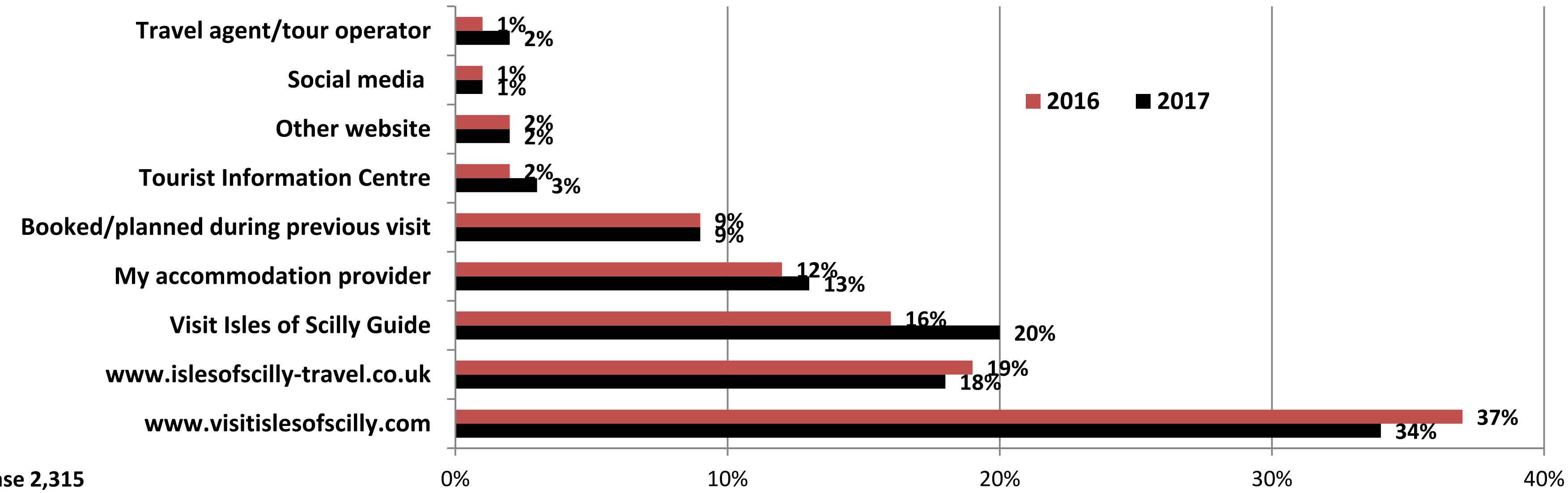
34% of respondents considered the www.visitislesofscilly.com website most useful to them when planning and booking their visit to the Isles of Scilly.

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 (37%, 34% and 24% during 2016, 2015 and 2014 respectively) and 20% of respondents said the Visit Isles of Scilly Guide (16%, 15% and 10% during 2016, 2015 and 2014 respectively). A further 18% said the www.islesofscilly-travel.co.uk website (19% 2016, 18% 2015 and 24% 2014).

13% said their accommodation provider (12% 2016, 10% 2015 and 13% 2014) and 9% said they had booked/planned their trip during a previous visit to the Islands (the same proportion as 2016 & 2015 and compared with 11% during 2014).

The results by segment are shown in the table overleaf. 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 2016-2017



Base 2,315

The www.visitislesofscilly.com website was found most useful by 34% and 45% of staying and first time visitors respectively. The Isles of Scilly Guide was found most useful by 25% and 30% of day and first time visitors respectively.

	STAYING	DAY	JAN-MAR	APR-JUN	JUL-SEPT	OCT-DEC	FIRST TIME	REPEAT	MAIN	SECOND	SHORT	2-4 DAYS	5-7 DAYS	8+ DAYS
www.visitislesofscilly.com	34%	30%	40%	33%	34%	31%	45%	29%	32%	37%	36%	43%	36%	24%
Visit Isles of Scilly Guide	19%	25%	13%	22%	18%	16%	30%	16%	18%	21%	21%	20%	21%	16%
www.islesofscilly-travel.co.uk	17%	25%	25%	16%	19%	18%	12%	20%	18%	15%	16%	13%	17%	19%
My accommodation provider	13%	5%	17%	13%	12%	16%	5%	15%	14%	12%	14%	13%	13%	14%
Booked/planned during previous visit	10%	3%	6%	9%	10%	8%	-	12%	12%	8%	3%	2%	6%	20%
Tourist Information Centre	3%	4%	-	3%	3%	6%	3%	3%	3%	2%	4%	3%	2%	4%
Travel Agent/Tour Operator	2%	3%	-	1%	2%	3%	2%	1%	1%	2%	3%	2%	2%	1%
Other website	1%	2%	-	2%	2%	1%	1%	2%	1%	2%	2%	3%	1%	1%
Social media	1%	1%	-	1%	1%	2%	1%	1%	1%	1%	2%	1%	1%	1%

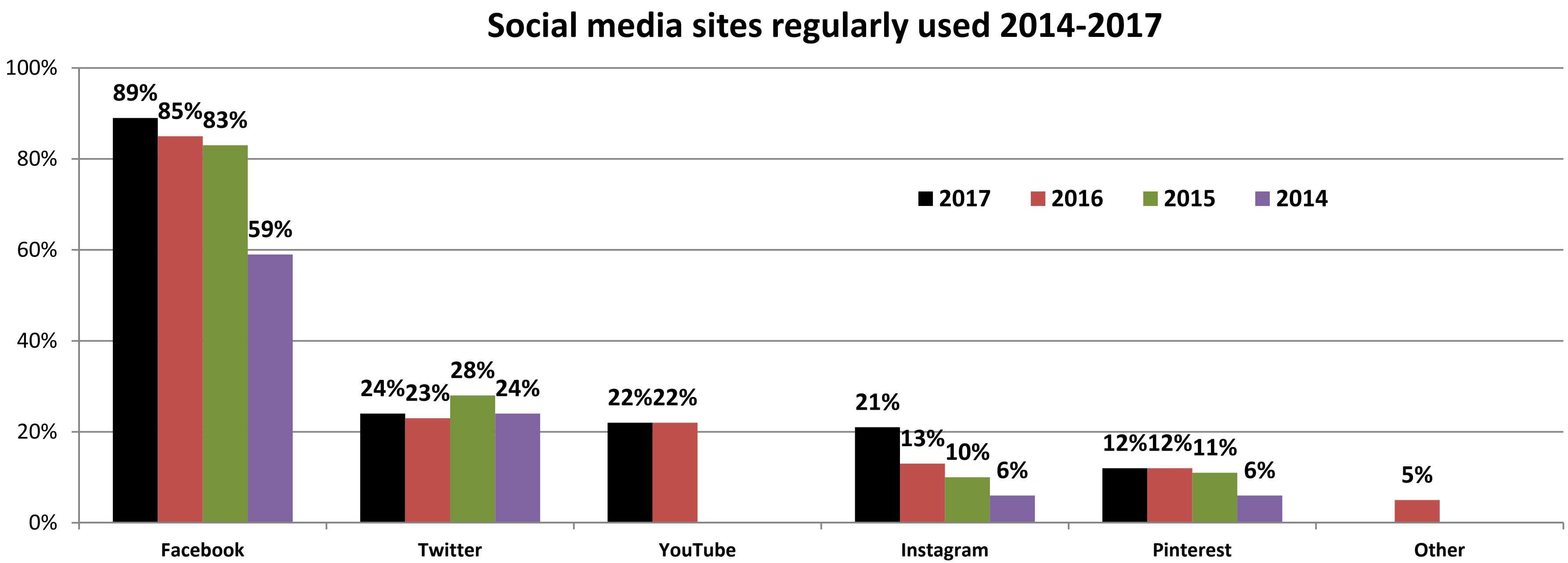
Analysis segment ranking the individual factor the highest

The majority of those on social media (89%) used Facebook on a regular basis.

Respondents were asked what social media sites they regularly used. 35% of all respondents said they were not on social media and these respondents have been removed from the results below to allow for comparisons with the previous survey years' data to be made.

Amongst those responding to the question, the majority of those using social media used Facebook on a regular basis, 89%, compared with 85% during 2016, 83% during 2015 and 59% during 2014.

A further 24% of respondents regularly used Twitter (23%, 28% and 24% during 2016, 2015 and 2014 respectively), 22% YouTube (the same proportion as 2016 and not asked during 2015 and 2014), 21% Instagram (13%, 10% and 6% during 2016, 2015 and 2014 respectively), 12% Pinterest (the same proportion as 2016 and compared with 11% during 2015 and 6% during 2014). There was little variation in the results according to analysis segment.



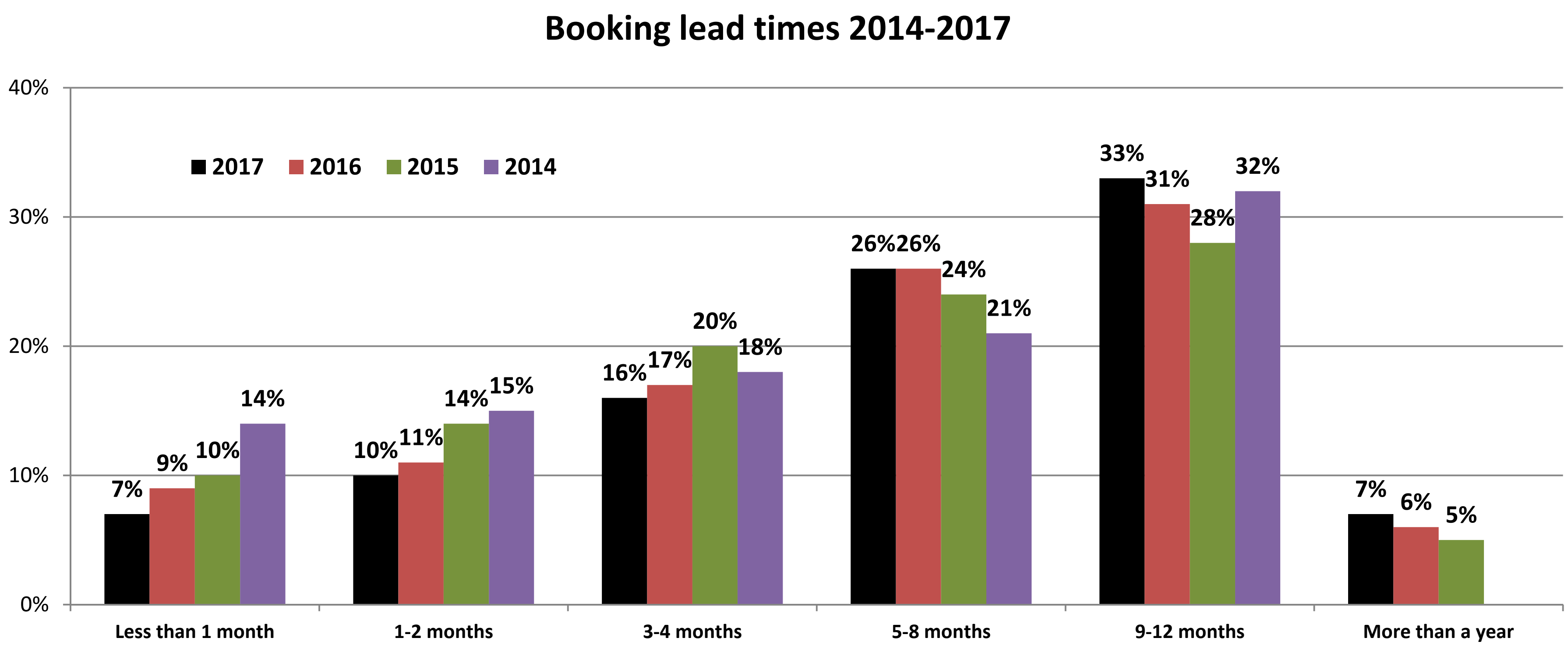
Base 1,720

40% of respondents had booked their holiday to the Islands 9 months or more in advance. 17% had booked less than 2 months before their visit.

33% of respondents had booked their holiday to the Islands 9-12 months in advance (31%, 28% and 32% during 2016, 2015 and 2014 respectively). A further 26% had booked 5-8 months before their visit (the same proportion as 2016 and compared with 24% during 2015 and 21% during 2014).

16% of respondents had booked 3-4 months in advance (17%, 20% and 18% during 2016, 2015 and 2014 respectively), 10% 1-2 months in advance (11% 2016, 14% 2015 and 15% 2014) and just 7% in each case less than one month before their actual holiday to the Islands (9%, 10% and 14% during 2016, 2015 and 2014 respectively) or more than a year in advance (6% and 5% during 2016 and 2015 respectively)

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



Base 2,710

Staying visitors, those visiting the Islands during July to September, previous visitors, those on their main holiday and those staying for 8+ days were the most likely to book their visit to the Isles of Scilly 9 months or more in advance.

Staying visitors (41%), those visiting the Islands during July to September (45%), previous visitors (48%), those on their main holiday (51%) and those staying for 8 or more days (61%) were the most likely to book their visit to the Isles of Scilly 9 months or more in advance.

Day visitors (42%), those visiting during January to March (20%), first time visitors (10%), those on a short break (16%), those arriving by private transport (47%) and those staying for 2-4 days (12%) were the most likely to book less than 1 month before their actual visit.

Booking lead times by analysis segment 2017	Less than 1 month	1-2 months	3-4 months	5-8 months	9-12 months	More than a year
STAYING	5%	9%	17%	27%	34%	7%
DAY	42%	17%	15%	11%	12%	3%
JAN-MAR	20%	20%	30%	16%	13%	2%
APR-JUN	7%	9%	19%	28%	30%	7%
JUL-SEP	7%	9%	13%	26%	37%	8%
OCT-DEC	13%	17%	22%	20%	25%	3%
FIRST TIME	10%	12%	26%	32%	17%	2%
REPEAT	6%	9%	13%	24%	39%	9%
MAIN	3%	6%	12%	28%	42%	9%
SECOND	4%	10%	19%	28%	32%	7%
SHORT	16%	22%	27%	23%	10%	1%

Booking lead times by analysis segment 2017	Less than 1 month	1-2 months	3-4 months	5-8 months	9-12 months	More than a year
SKYBUS	5%	10%	17%	26%	35%	7%
SCILLONIAN	8%	10%	16%	27%	33%	6%
PRIVATE	47%	12%	9%	15%	15%	3%
CRUISE	4%	12%	8%	50%	19%	8%
OTHER TRANSPORT	10%	10%	14%	26%	30%	11%
2-4 DAYS	12%	23%	27%	27%	11%	-
5-7 DAYS	4%	9%	18%	30%	33%	6%
8+ DAYS	4%	4%	10%	22%	48%	13%

Base 2,710

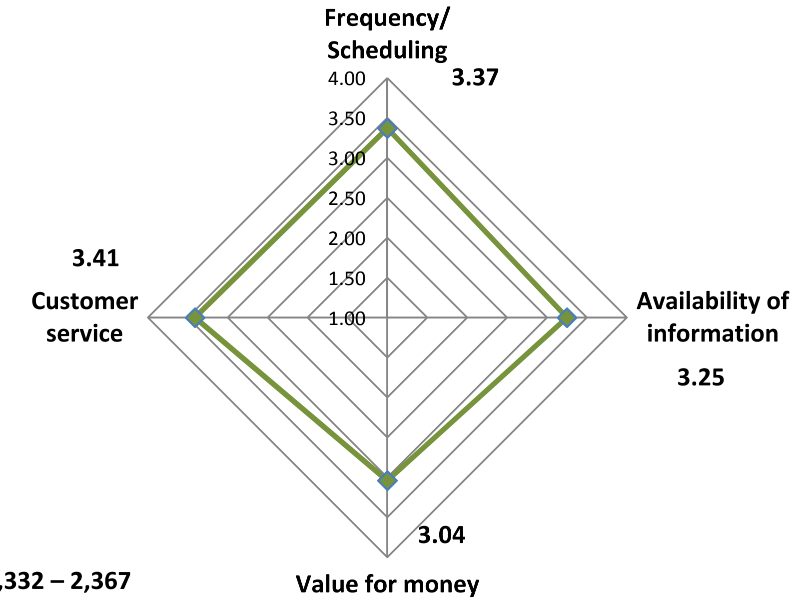
The Travel Experience

All factors related to satisfaction with inter-island boat travel received good average scores of between 3.04 and 3.41 out of a max. of 4.00.

Visitors were asked to rate their level of satisfaction with a number of factors related to their experience of inter-island boat travel 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.

All four indicators received good average scores of between 3.04 and 3.41. The highest level of satisfaction was with customer service (3.41), followed by frequency/scheduling (3.37) and the availability of information (3.25) and was lowest for the value for money (3.04). The results by analysis segment are shown in the table overleaf. Overall, satisfaction levels were lower than during 2016 and 2015.

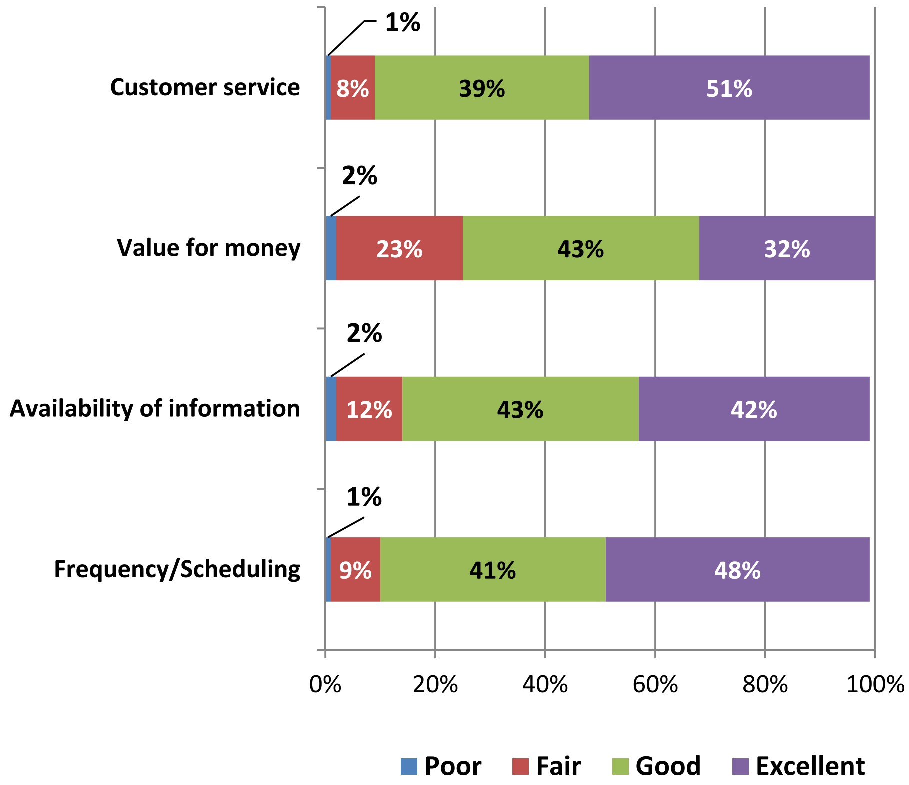
Satisfaction with inter-island boat travel



Base 2,332 – 2,367

Inter-island boat travel	Frequency/ scheduling	Availability of information	Value for money	Customer service
2017	**3.37**	**3.25**	**3.04**	**3.41**
2016	3.41	3.31	3.07	3.45
2015	n/a	3.27	3.08	3.42

Satisfaction with inter-island boat travel



On the whole, satisfaction levels with inter-island boat travel were higher amongst staying visitors, those visiting the Islands during July to September, amongst repeat visitors, those on their main holiday, those staying on St. Agnes, those travelling to the Islands via the Skybus or other transport and those staying 8+ days.

Mean satisfaction score out of a max. of 4.00 2017	Frequency/Scheduling	Availability of information	Value for money	Customer service
STAYING	3.37	3.26	3.04	3.41
DAY	3.18	3.08	2.89	3.25
JAN-MAR	3.00	3.02	2.78	3.37
APR-JUN	3.35	3.25	3.02	3.40
JUL-SEP	3.41	3.27	3.07	3.42
OCT-DEC	3.32	3.22	2.99	3.34
FIRST TIME	3.35	3.22	3.15	3.41
REPEAT	3.38	3.27	3.00	3.41
MAIN	3.41	3.28	3.06	3.45
SECOND	3.33	3.21	2.99	3.36
SHORT	3.30	3.23	3.06	3.36
ST MARY'S	3.44	3.31	3.11	3.44
ST AGNES	3.42	3.33	3.18	3.50
BRYHER	3.41	3.30	3.02	3.47
TRESCO	3.30	3.16	2.93	3.41
ST MARTIN'S	3.18	3.12	2.91	3.32
SKYBUS	3.40	3.28	3.10	3.41
SCILLONIAN	3.37	3.24	3.00	3.42
PRIVATE	3.30	3.23	2.96	3.36
CRUISE	2.90	2.80	2.64	2.73
OTHER TRANSPORT	3.26	3.20	2.95	3.34
2-4 DAYS	3.35	3.22	3.13	3.39
5-7 DAYS	3.38	3.26	3.06	3.41
8+ DAYS	3.38	3.27	2.97	3.42

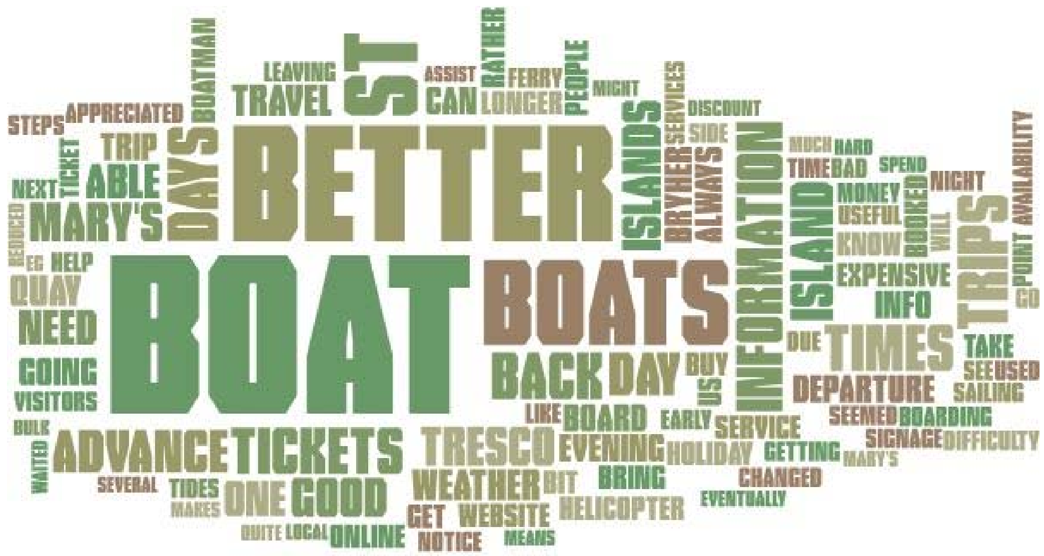
Analysis segment ranking the individual factor the highest

Many respondents provided suggestions as to how the overall inter-island travel experience on the Isles of Scilly could be improved. There were a number of suggestions including the need for better boats.

Respondents were asked if they had any suggestions to improve the overall inter-island travel experience on the Isles of Scilly and some of the key responses are summarised in the table and word cloud below. There was a wide and varied range of responses provided and the full list should be examined to gain a full understanding of this area.

Many mentioned the need for a better boat/boats (56%). Other suggestions included better/more frequent sailing times (16%), better advertising/advance notice of trips (8%) and better/clearer information (8%).

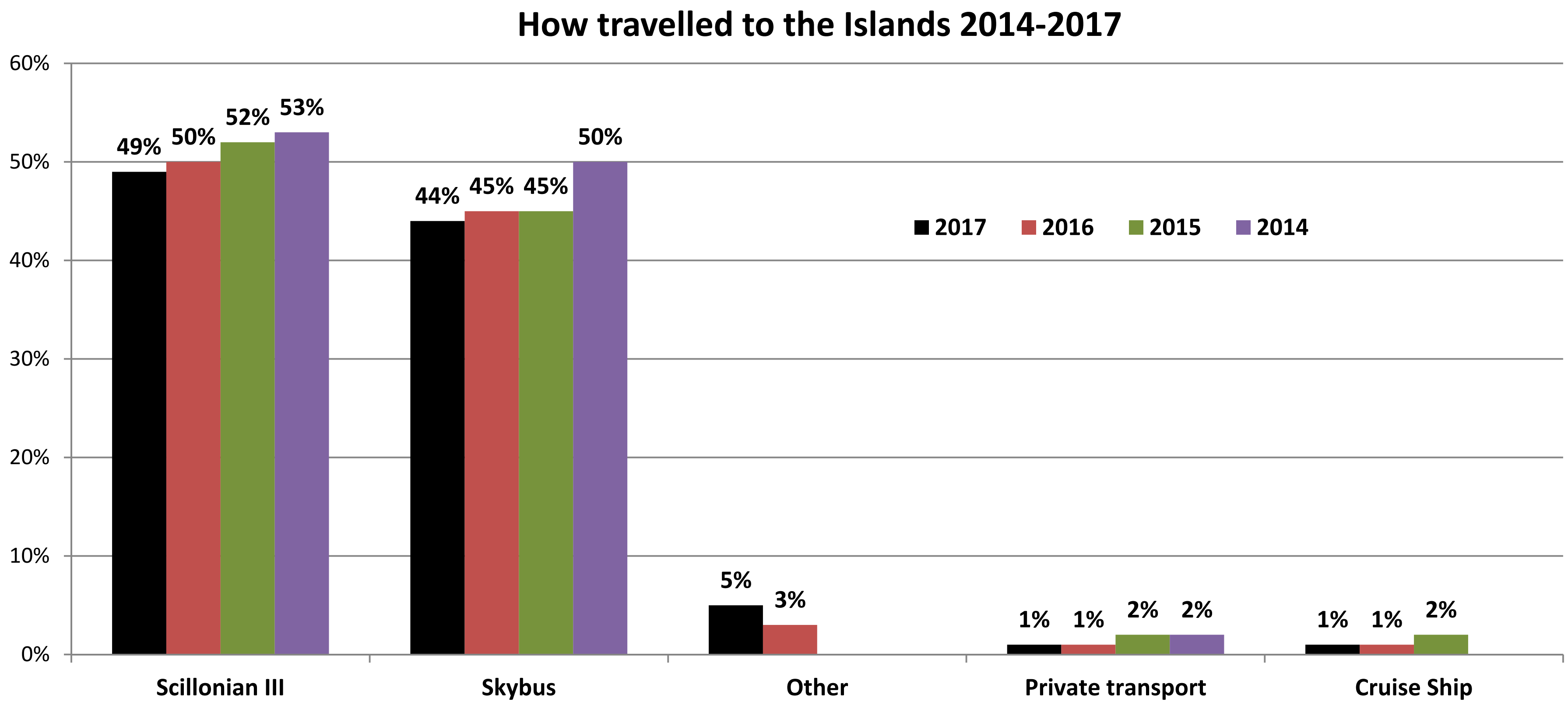
	Count	%
Improved boat/boats	346	56%
Better sailing times / more frequent sailings / later sailings	100	16%
Better advertising/advance notice of trips	50	8%
Better / clearer information	52	8%
Too expensive / cheaper	27	7%
Improved signage	25	4%
Advance tickets	23	4%
Use helicopter	18	3%



49% of respondents had travelled to the Islands on the Scillonian and a further 44% via the Skybus.

49% of respondents had travelled to the Islands on the Scillonian (50%, 52% and 53% during 2016, 2015 and 2014 respectively) and a further 44% via the Skybus (45% in each case during 2016 and 2015 and compared with 50% during 2014).

The results by analysis segment are shown overleaf.



Base 2,647

Please note that multiple responses were provided for this question during the 2014 survey.

52% of visitors to the Islands in each case during January to March and October to December, 47% of repeat visitors, 49% of those both on a second holiday and short break, 58% of those staying on Tresco and 50% of those staying 2-4 days had arrived on the Islands by Skybus.

52% of visitors to the Islands in each case during January to March and October to December, 47% of repeat visitors, 49% on both a second holiday and short break, 58% of those staying on Tresco and 50% of those staying 2-4 days had arrived on the Islands by Skybus.

12% of day visitors arrived on a cruise ship.

How travelled to the Islands by analysis segment 2017	Skybus	Scillonian III	Private Boat	Private Plane	Cruise Ship	Other
STAYING	46%	48%	1%	-	-	5%
DAY	21%	62%	1%	-	12%	3%
JAN-MAR	52%	33%	-	-	2%	13%
APR-JUN	46%	47%	1%	1%	1%	5%
JUL-SEP	42%	52%	1%	-	1%	4%
OCT-DEC	52%	42%	1%	1%	1%	3%
FIRST TIME	37%	54%	1%	-	3%	4%
REPEAT	47%	47%	1%	-	-	5%
MAIN	43%	52%	1%	-	1%	4%
SECOND	49%	44%	1%	1%	-	6%
SHORT	49%	42%	1%	1%	1%	6%

How travelled to the Islands by analysis segment 2017	Skybus	Scillonian III	Private Boat	Private Plane	Cruise Ship	Other
ST MARY'S	45%	49%	1%	-	1%	5%
ST AGNES	37%	60%	4%	-	-	2%
BRYHER	48%	48%	3%	-	-	3%
TRESCO	58%	34%	3%	-	1%	5%
ST MARTIN'S	39%	57%	2%	-	-	3%
2-4 DAYS	50%	41%	1%	1%	1%	5%
5-7 DAYS	45%	49%	1%	-	-	4%
8+ DAYS	45%	49%	1%	-	-	5%

Base 2,647

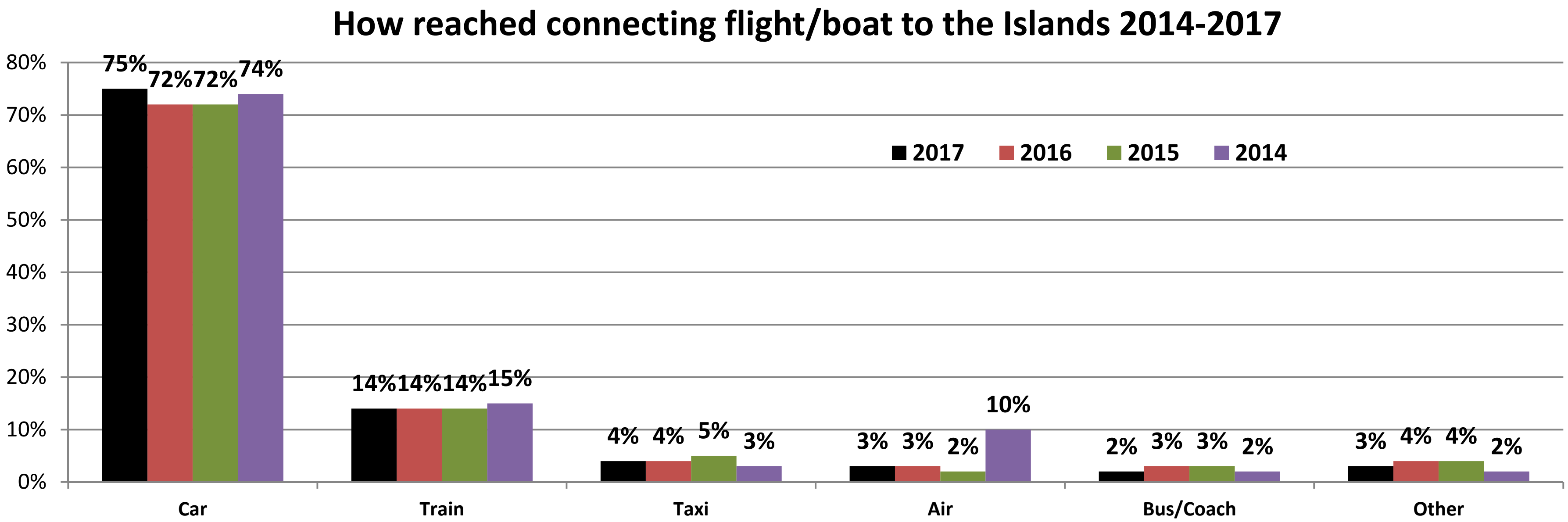
Three quarters of respondents had reached their connecting flight or boat to the Islands by car.

Three quarters of respondents had reached their connecting flight or boat to the Islands by car (compared with 72% in each case during 2016 and 2015 and 74% during 2014).

A further 14% of respondents had done so by train (the same proportion as during 2016 and 2015 and compared with 15% during 2014), 4% by taxi (the same proportion as 2016 and compared with 5% in 2015 and 3% in 2014), 2% by bus/coach (3% in each case during 2016 and 2015 and 2% 2014) and 3% by air (the same proportion as 2016 and compared with 2% in 2015 and 10% in 2014).

There was little variation in the results according to segment.

3% 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.



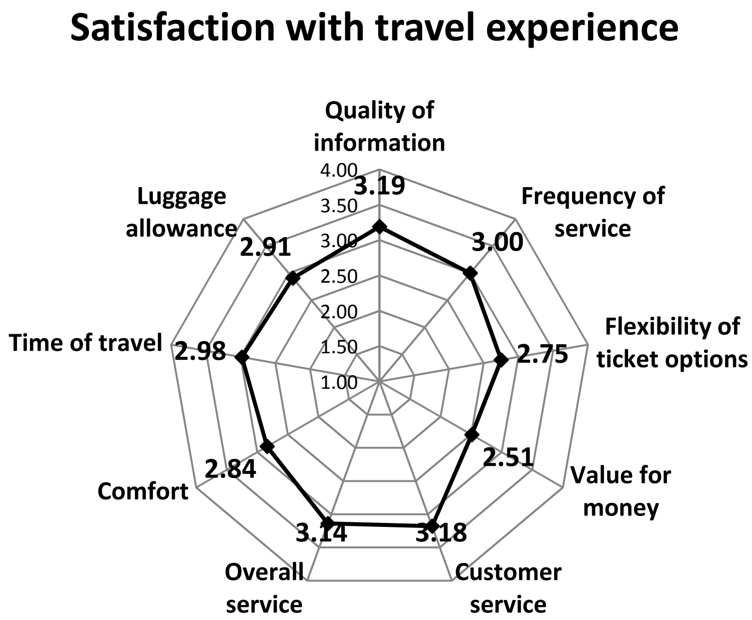
Base 2,403

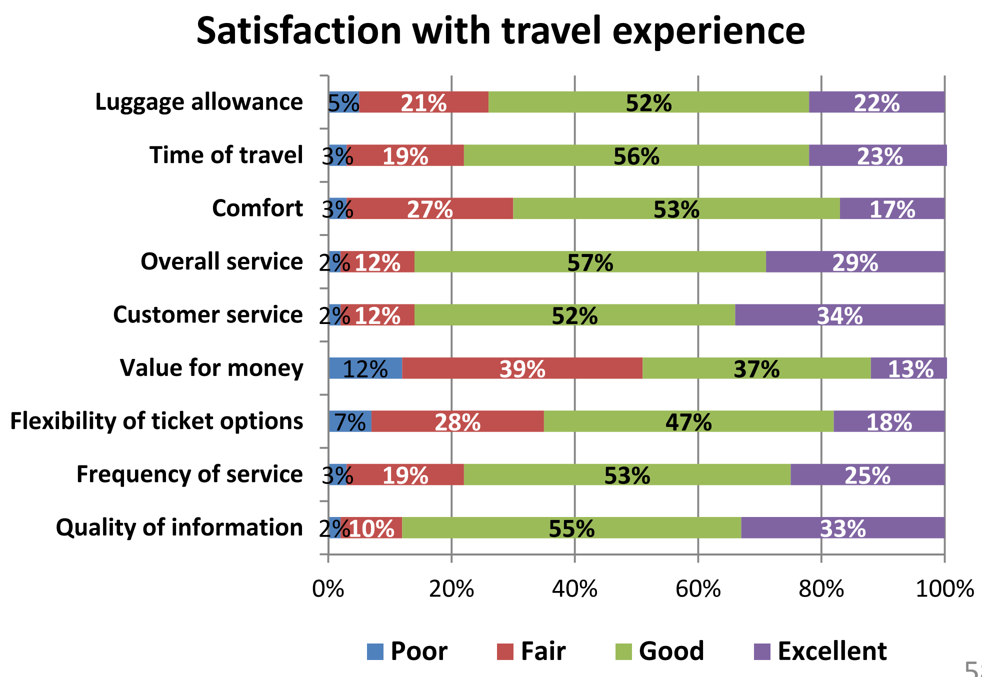
The quality of the travel information, frequency of service, customer service and overall service all received good average scores of between 3.00 and 3.19 out of 4.00.

Visitors were also asked to rate their level of satisfaction with a number of factors related to their experience of travelling to the Islands 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, frequency of service, customer service and overall service all received good average scores of between 3.00 and 3.19. The flexibility of ticket options, value for money of travel, comfort of travel, time of travel and luggage allowance all received lower average scores of between 2.51 and 2.98 out of 4.00. The highest level of satisfaction was with the quality of travel information (3.19) and was lowest for value for money of travel to the Islands (2.51).

The results by segment are shown in the table overleaf. Overall, satisfaction levels amongst visitors regarding their travel experience were lower than during 2016.





Base 2,357-2,374

On the whole, satisfaction levels with the travel experience were higher amongst day visitors, those visiting the Islands during July to September, amongst first time visitors, those on their main holiday of the year, those staying on St. Agnes, those travelling to the Islands via the Skybus and those staying 2-4 days.

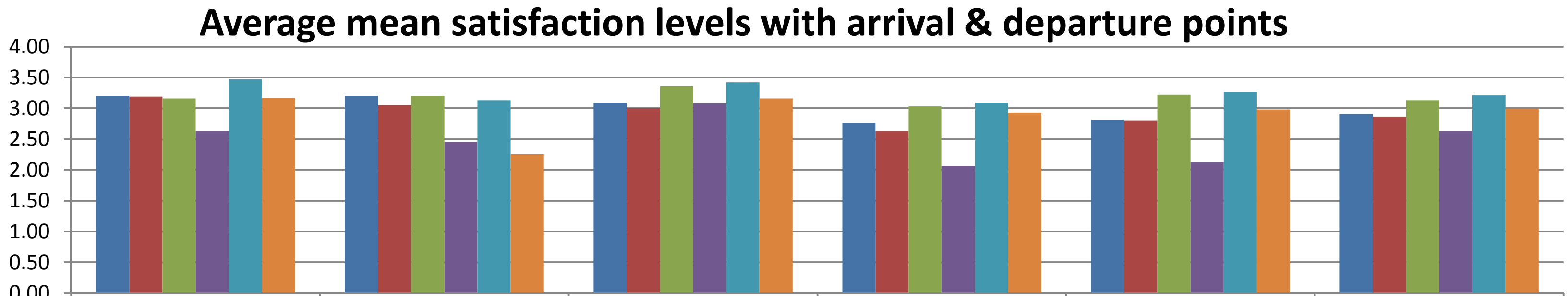
Mean satisfaction score out of a max. of 4.00 2017	Quality of information	Frequency of service	Flexibility of ticket options	Value for money	Customer service	Overall service	Comfort	Time of travel	Luggage allowance
STAYING	3.19	3.00	2.75	2.48	3.18	3.13	2.84	2.98	2.90
DAY	3.24	3.07	2.86	2.90	3.28	3.24	2.93	3.03	3.04
JAN-MAR	3.19	2.98	2.56	2.29	3.29	3.12	2.74	3.02	2.86
APR-JUN	3.13	2.95	2.70	2.46	3.15	3.10	2.78	2.93	2.87
JUL-SEP	3.24	3.05	2.80	2.55	3.20	3.16	2.89	3.02	2.94
OCT-DEC	3.14	2.98	2.77	2.48	3.16	3.13	2.84	2.96	2.98
FIRST TIME	3.22	3.07	2.91	2.72	3.25	3.23	2.94	3.04	3.01
REPEAT	3.18	2.98	2.70	2.43	3.16	3.10	2.81	2.96	2.88
MAIN	3.20	3.02	2.76	2.50	3.19	3.15	2.85	2.99	2.90
SECOND	3.18	2.95	2.73	2.43	3.16	3.10	2.81	2.97	2.91
SHORT	3.13	2.99	2.75	2.52	3.13	3.10	2.80	2.94	2.92
ST MARY'S	3.20	3.00	2.76	2.50	3.19	3.14	2.84	2.99	2.92
ST AGNES	3.32	3.15	2.85	2.63	3.32	3.26	2.99	3.10	3.07
BRYHER	3.26	3.12	2.85	2.57	3.24	3.19	2.96	3.08	2.96
TRESCO	3.17	3.01	2.74	2.40	3.21	3.14	2.85	3.01	2.79
ST MARTIN'S	3.25	3.07	2.83	2.56	3.23	3.22	2.94	3.03	2.96
SKYBUS	3.23	3.13	2.78	2.33	3.23	3.17	2.89	3.13	2.69
SCILLONIAN	3.15	2.89	2.73	2.67	3.14	3.10	2.79	2.84	3.12
2-4 DAYS	3.20	3.01	2.81	2.56	3.19	3.18	2.88	3.04	2.97
5-7 DAYS	3.19	3.00	2.78	2.55	3.21	3.16	2.84	2.98	2.97
8+ DAYS	3.17	2.98	2.66	2.33	3.12	3.05	2.80	2.95	2.75
2017	3.19	3.00	2.75	2.51	3.18	3.14	2.84	2.98	2.91
2016	3.27	3.09	2.82	2.54	3.23	3.20	2.91	3.04	2.94
2015	3.24	3.01	2.73	2.46	3.21	3.17	2.89	2.98	n/a
2014	3.39	3.11	2.85	2.53	3.29	3.23	n/a	n/a	n/a

Analysis segment ranking the individual factor the highest

St Mary's Airport received the highest levels of satisfaction amongst visitors across all categories except accessibility. Penzance Quay was rated the lowest in terms of satisfaction across all categories except for car parking & customer service .

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 (3.47) and lowest at Penzance Quay (2.63). In terms of car parking, they were highest at Exeter and Land's End (3.20 each) and lowest at St. Mary's Quay (2.25). Visitors' satisfaction levels in terms of customer service were highest at St Mary's Airport (3.42) and lowest at Newquay (3.00) and in terms of the range of facilities were highest at St Mary's Airport (3.09) and lowest at Penzance Quay (2.07). Visitors' satisfaction levels in terms of the quality of facilities were also highest at St Mary's Airport (3.26) and lowest again at Penzance Quay (2.13) and finally, in terms of the quality of information, they were again highest at St Mary's Airport (3.21) and lowest at Penzance Quay (2.63).



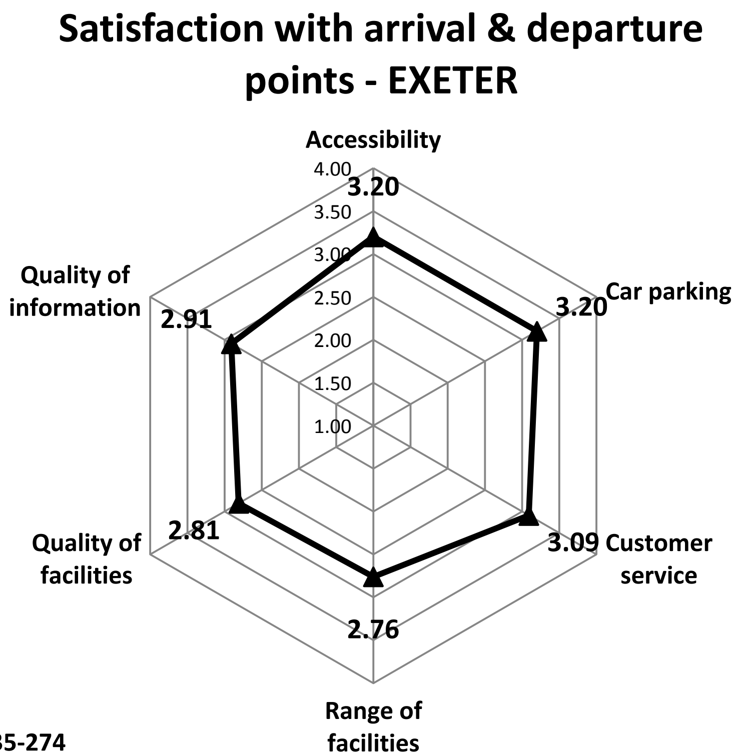
	Accessibility	Car Parking	Customer Service	Range of Facilities	Quality of Facilities	Quality of Information
Exeter	3.20	3.20	3.09	2.76	2.81	2.91
Newquay	3.19	3.05	3.00	2.63	2.80	2.86
Land's End	3.16	3.20	3.36	3.03	3.22	3.13
Penzance Quay	2.63	2.45	3.08	2.07	2.13	2.63
St Mary's Airport	3.47	3.13	3.42	3.09	3.26	3.21
St Mary's Quay	3.17	2.25	3.16	2.93	2.98	2.99

Base 237-1,281

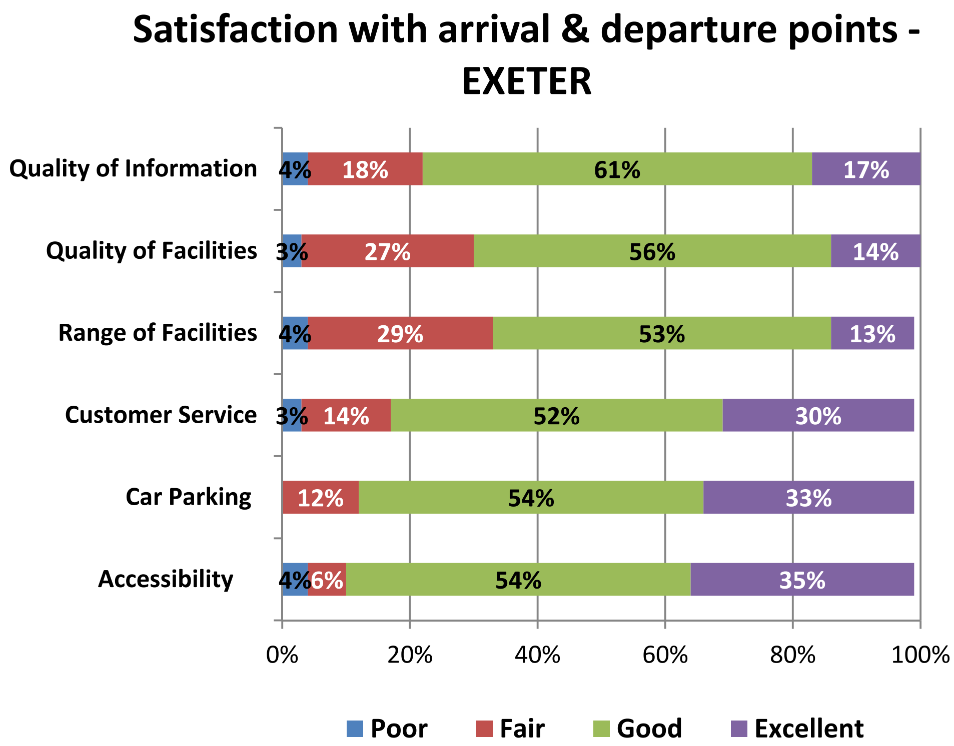
A number of respondents provided a comment about their arrival/departure points and these can be found in the appendices which accompany this report.

Exeter satisfaction scores were lower than 2016 in terms of accessibility and car parking but higher for all other indicators during 2017.

Average scores at Exeter increased in 2017 compared to 2016 for all areas except accessibility and car parking (3.20 each), although these were the two indicators respondents were most satisfied with at Exeter. The lowest satisfaction was for the range of facilities at 2.76 out of 4.00 with a third of respondents rating this aspect as ‘poor’ or ‘fair’. There was little variation in the results according to segment.



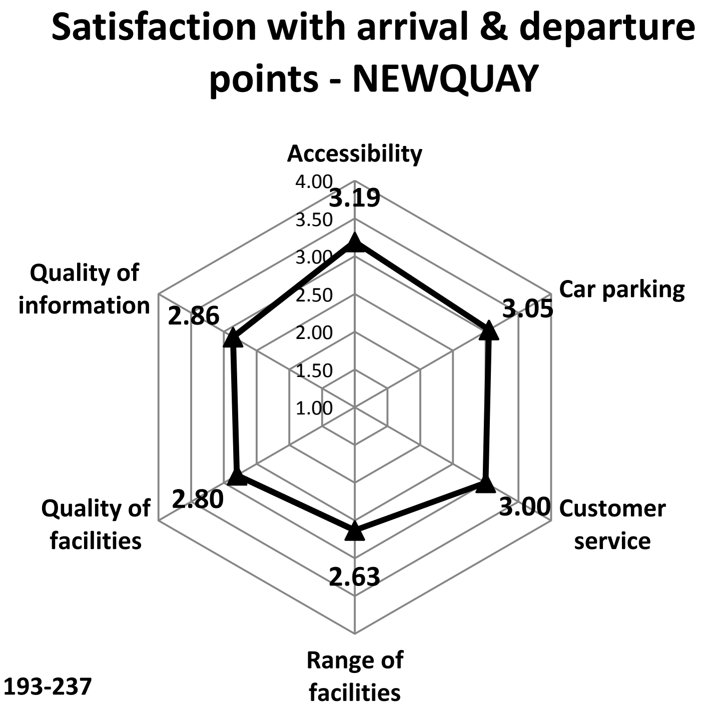
Base 235-274



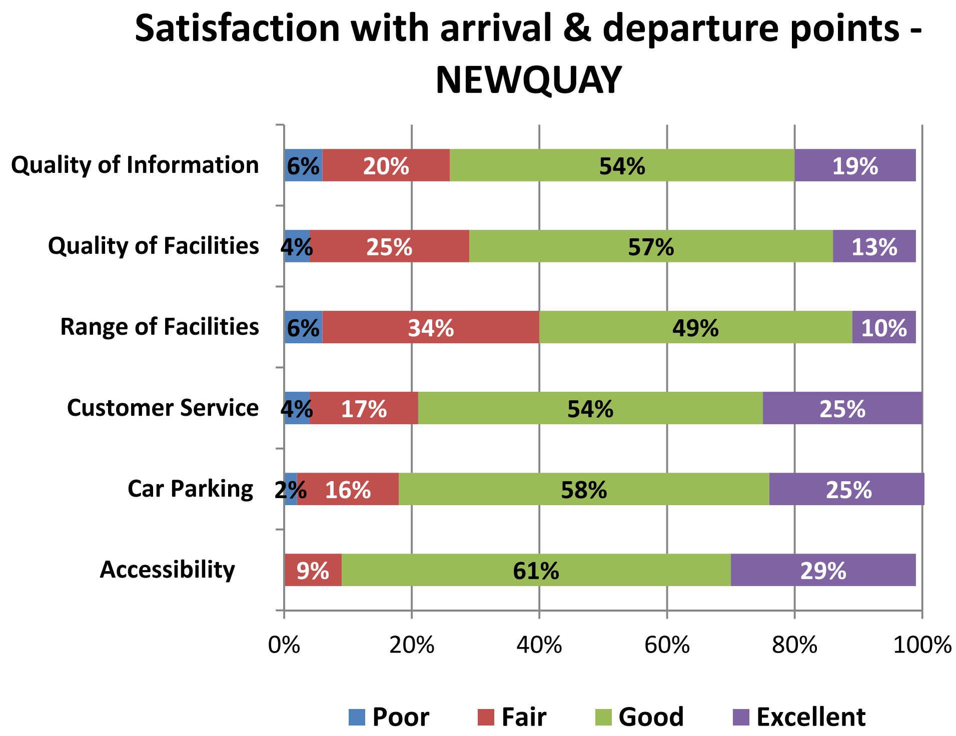
Exeter	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2017	**3.20**	**3.20**	**3.09**	**2.76**	**2.81**	**2.91**
2016	3.25	3.27	3.07	2.70	2.76	2.92
2015	3.14	3.17	2.97	2.45	2.65	2.71

At Newquay, all factors saw decreased satisfaction levels in 2017 compared to 2016 with the exception of accessibility which remained level.

At Newquay, all factors saw decreased satisfaction levels in 2017 compared to 2016 with the exception of accessibility which remained level. Three indicators received good average scores; 3.19 for accessibility, 3.05 for car parking and 3.00 for customer service. All other indicators received average scores of 2.86 or lower – the lowest being for the range of facilities at 2.63 out of 4.00 with 40% of respondents rating this aspect as 'poor' or 'fair'. There was little variation in the results according to segment.



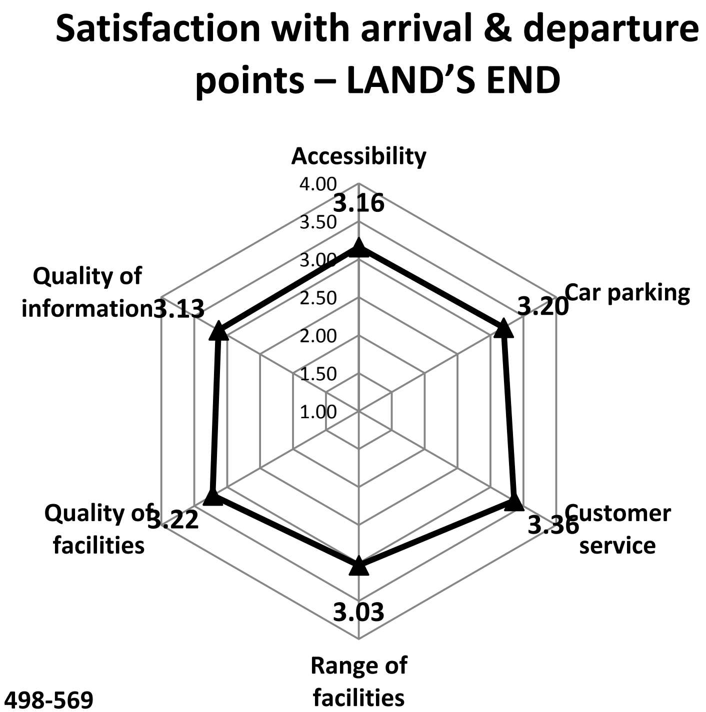
Base 193-237



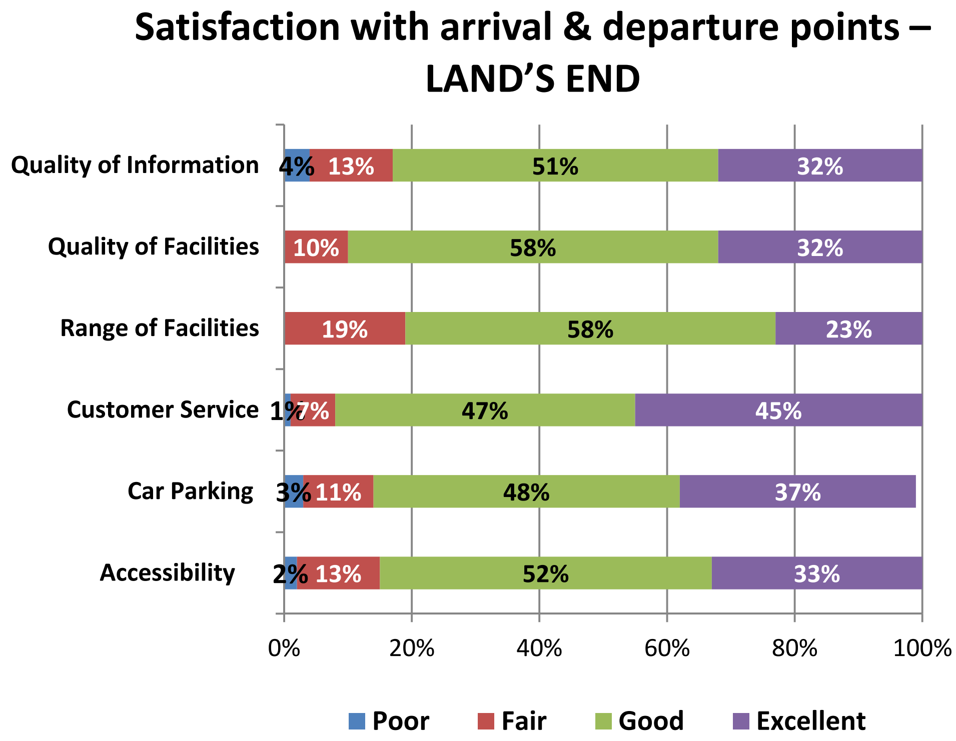
Newquay	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2017	**3.19**	**3.05**	**3.00**	**2.63**	**2.80**	**2.86**
2016	3.19	3.19	3.20	2.72	2.83	2.92
2015	3.01	3.04	3.03	2.57	2.73	2.77

During 2017 all indicators saw decreased satisfaction levels at Land's End compared to 2016.

Whilst all indicators for Land's End received good average scores of 3.03 or higher – the highest being for customer service (3.36) and the lowest for the range of facilities at 3.03 out of 4.00, all indicators saw decreased satisfaction levels compared with last year. Between 81% and 92% of respondents rated each of the indicators as 'good' or 'excellent'. There was little variation in the results according to segment.



Base 498-569



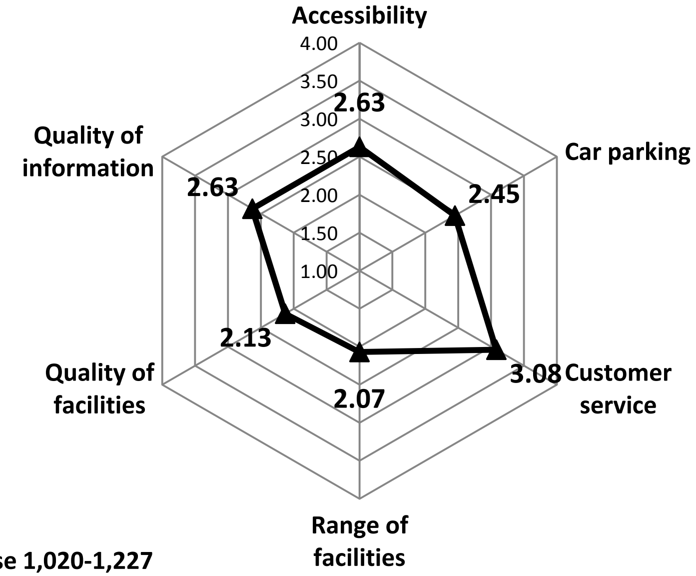
Land's End	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2017	**3.16**	**3.20**	**3.36**	**3.03**	**3.22**	**3.13**
2016	3.24	3.25	3.43	3.12	3.33	3.22
2015	3.18	3.20	3.44	3.08	3.29	3.17

All six indicators for Penzance Quay in 2017 decreased compared to 2016.

There were decreases in satisfaction levels across all indicators for Penzance Quay compared with last year. Customer service received a good average score of 3.08 with the remaining five indicators receiving lower average scores of 2.63 or lower – the lowest being for the range of facilities at 2.07 out of 4.00 with 68% of respondents rating this indicator as ‘poor’ (29%) or ‘fair’ (39%).

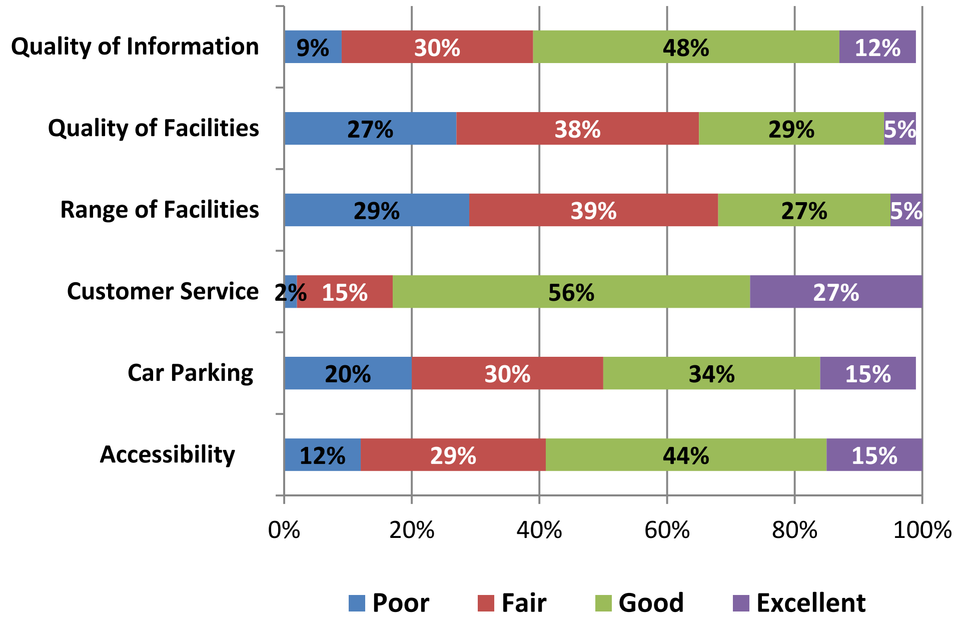
There was little variation in the results according to segment.

Satisfaction with arrival & departure points – PENZANCE QUAY



Base 1,020-1,227

Satisfaction with arrival & departure points – PENZANCE QUAY

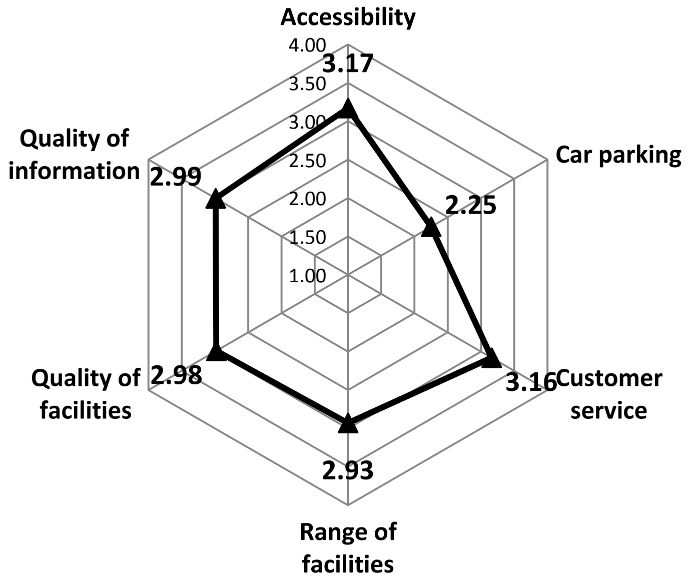


Penzance Quay	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2017	**2.63**	**2.45**	**3.08**	**2.07**	**2.13**	**2.63**
2016	2.68	2.47	3.11	2.19	2.22	2.68
2015	2.55	2.46	2.99	1.99	2.05	2.58

All six indicators for St. Mary's Quay in 2017 decreased compared to 2016.

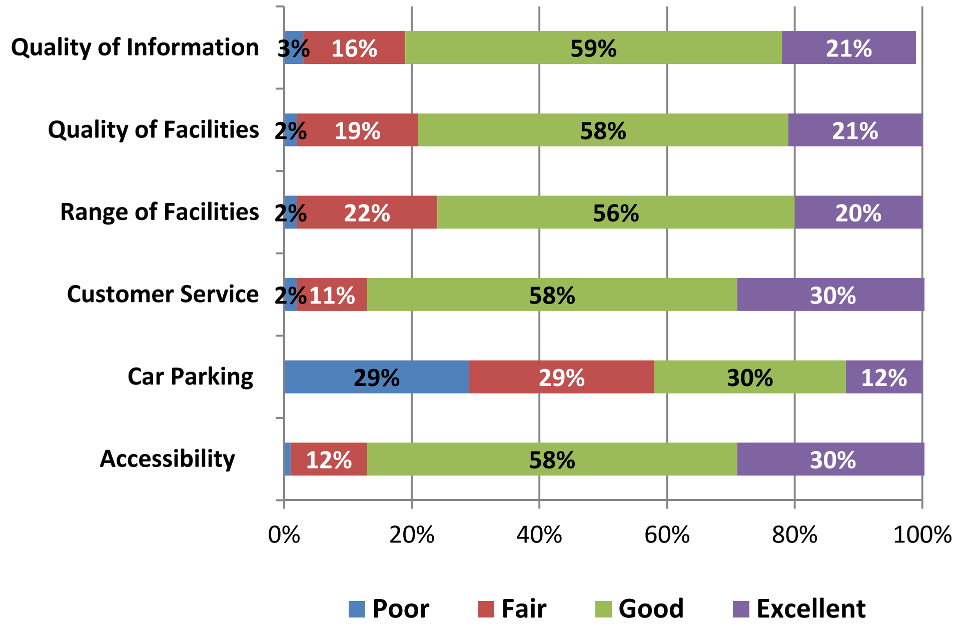
At St. Mary's Quay all indicators also witnessed decreased satisfaction levels compared to 2016. Accessibility and customer service both received good average scores of 3.17 and 3.16 out of 4.00 respectively. Car parking, the range and quality of facilities and the quality of information all received lower average scores of 2.99 or lower with car parking rated the lowest (2.25) with 58% of respondents rating this indicator as ‘poor’ or ‘fair’. There was little variation in the results according to segment.

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



Base 532-1235

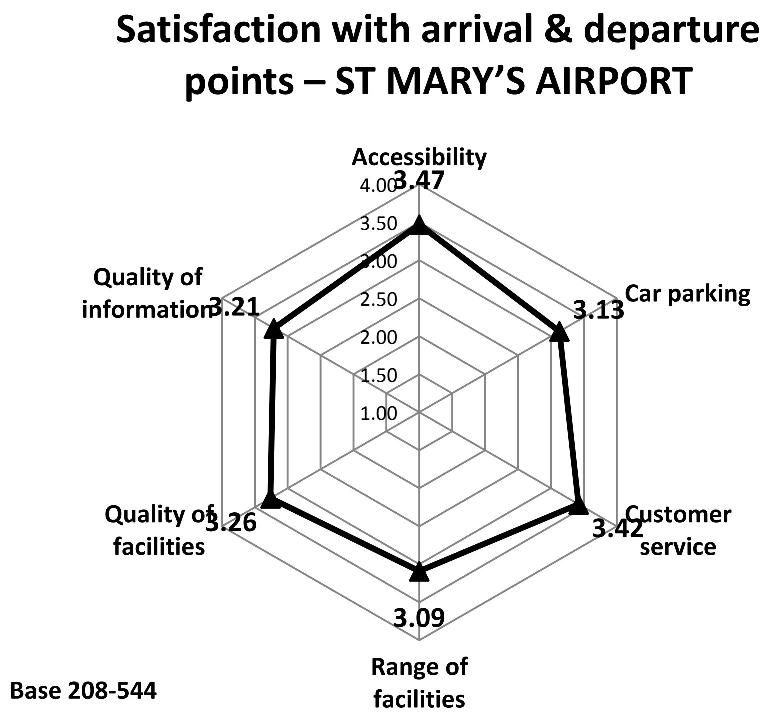
Satisfaction with arrival & departure points – ST MARY’S QUAY

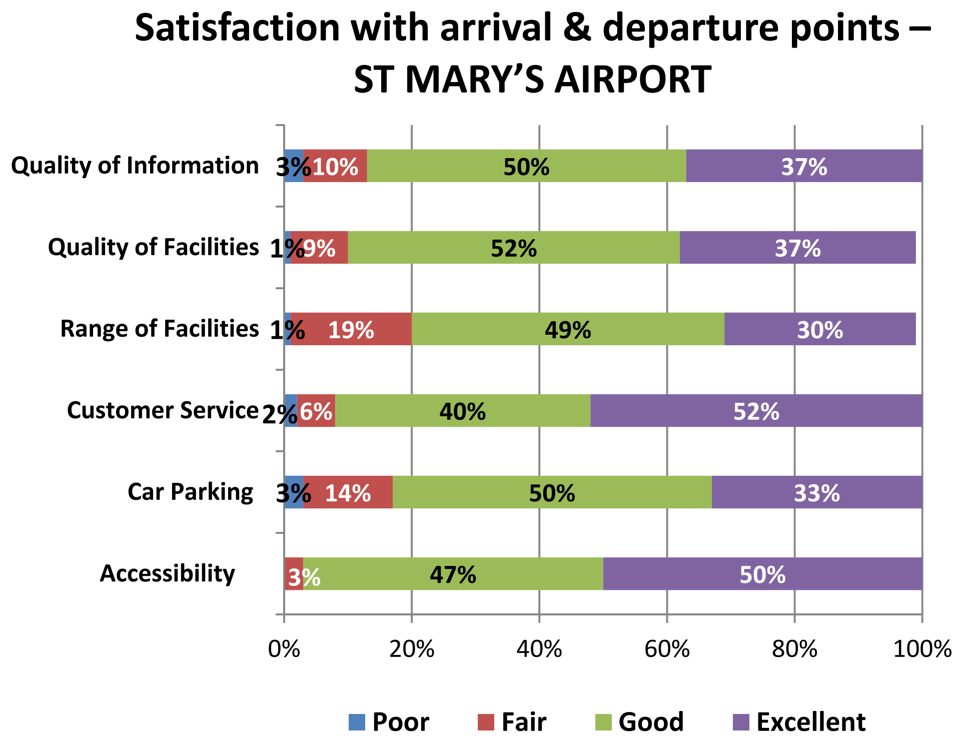


St. Mary's Quay	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2017	**3.17**	**2.25**	**3.16**	**2.93**	**2.98**	**2.99**
2016	3.20	2.36	3.19	3.03	3.08	3.06
2015	2.94	2.12	3.06	2.59	2.68	2.8

All six indicators for St. Mary's Airport in 2017 decreased compared to 2016.

At St. Mary's Airport all indicators witnessed decreased satisfaction levels compared to 2016. However, all six indicators received good average scores of 3.13 or higher including accessibility (3.47), car parking (3.13), customer service (3.42), range of facilities (3.09), quality of facilities (3.26) and quality of information (3.21). There was little variation in the results according to segment.





St. Mary's Airport	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2017	**3.47**	**3.13**	**3.42**	**3.09**	**3.26**	**3.21**
2016	3.56	3.25	3.49	3.16	3.36	3.29
2015	3.36	2.95	3.40	2.98	3.17	3.18

A third of all respondents provided suggestions as to how the travel experience to and from the Isles of Scilly could be improved. There were a number of suggestions as to how facilities could be improved at Penzance.

Respondents were asked if they had any suggestions to improve the overall travel experience to and from the Isles of Scilly and some of the main responses are summarised in the table and Word Cloud below. There was a wide and varied range of responses provided and the full list should be examined to gain a full understanding of this area.

Many mentioned the need for a better/improve facilities at Penzance (25%), a helicopter service (23%), improved facilities at the quay (13%), as well as better luggage retrieval at Penzance (12%), improved weather (11%) and a better/improved service and flights (10% each).

	Count	%
Better / improve facilities at Penzance	233	**25%**
Bring back helicopter!	214	**23%**
Quay facilities	122	**13%**
Better luggage retrieval at Penzance	116	**12%**
Weather	99	**11%**
Better / improved service	93	**10%**
Flights	90	**10%**
Better / improved boat	78	**8%**
Scillonian experience	70	**8%**
Better information	45	**5%**
Waiting times	43	**5%**
Car parking too expensive	40	**4%**
Better facilities	40	**4%**

55% of respondents included a stop over in the South West as part of their visit to the Isles of Scilly.

55% of respondents (78% 2016) included a stop over in the South West as part of their visit to the Isles of Scilly (including 55% of staying visitors). A further 21% lived outside of the region but did not include a stop over in their trip (3% 2016) and 24% lived in the South West and also didn't include a stop over in their trip (18% 2016). There was little significant variation amongst the analysis segments for this question.

Of those staying over in the South West 89% stayed in Cornwall (88% 2016) with 17% staying elsewhere in the region (16% 2016). It is possible that visitors stayed in both Cornwall and elsewhere in the South West and as a result the data does not total to 100%.

74% (68% 2016) of those including an overnight stop stayed for one night before travelling on to the Isles of Scilly (72% in Cornwall and 79% in other South West locations). 33% stayed for one night when returning from Scilly (2% 2016), 27% had a longer stay before going to Scilly (the same proportion as last year) and 21% had a longer stay upon returning from Scilly (3% 2016).

Base 1,303-1,305

Visitors' Opinions

islands partnership

The South West Research Company

Introduction

The 2017 survey once again 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
- Transport on St. Mary's
- Food & Drink
- Evening Entertainment
- Shops/Grocery Provision
- Signposting/Maps/Information Boards
- Tourist Information Centre
- Public Toilets/Cleanliness of Streets
- General Atmosphere/Sense of Welcome

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

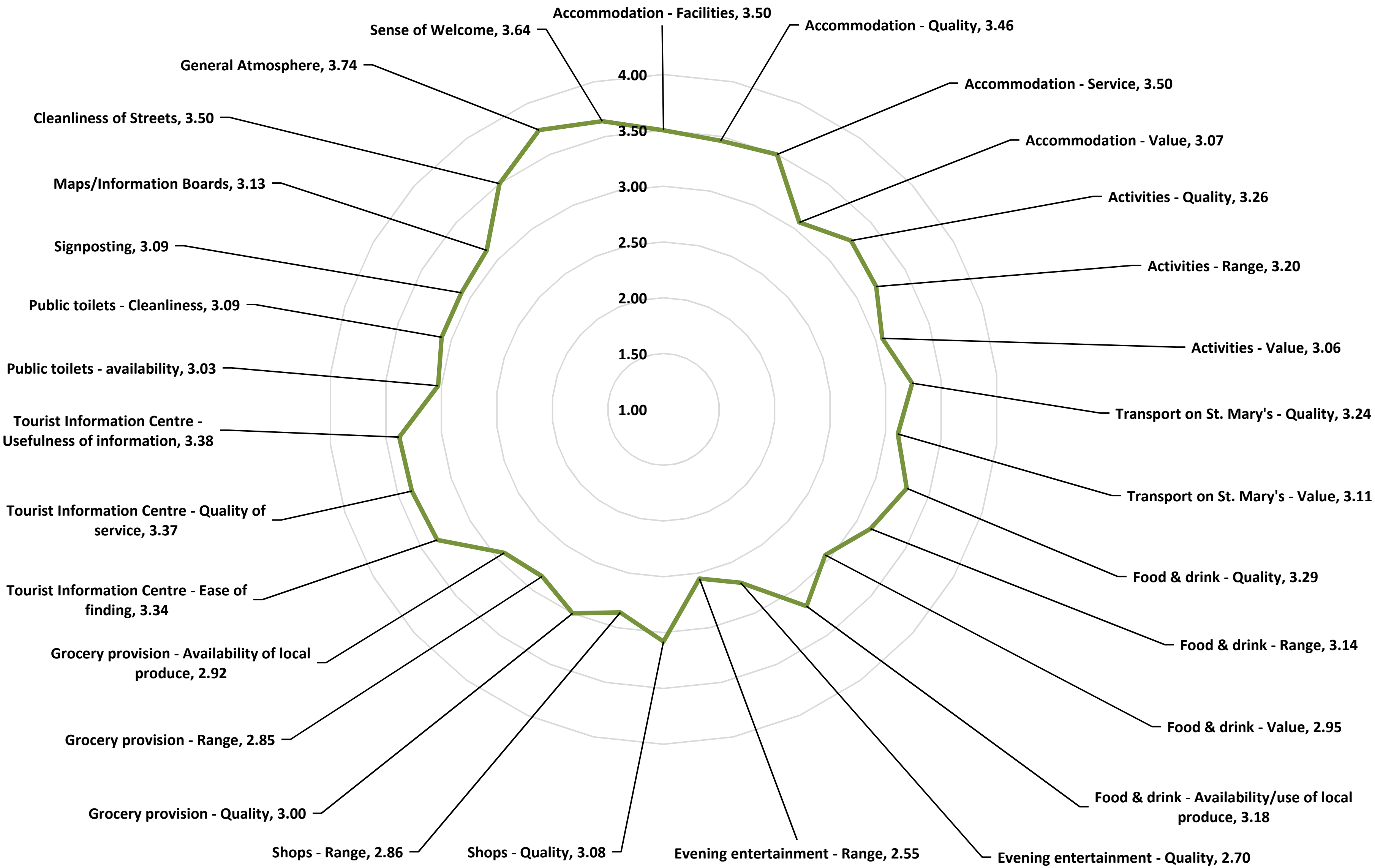
Satisfaction levels were highest for the general atmosphere and sense of welcome and lowest for the quality and range of evening entertainment.

#	Indicator	Mean score	Rank	#	Indicator	Mean score	Rank
1	Accommodation – Facilities	3.50	3	**16**	Shops – Quality	3.08	20
2	Accommodation – Quality	3.46	6	**17**	Shops – Range	2.86	27
3	Accommodation – Service	3.50	4	**18**	Grocery provision – Quality	3.00	24
4	Accommodation – Value	3.07	21	**19**	Grocery provision – Range	2.85	28
5	Activities – Quality	3.26	11	**20**	Grocery provision - Availability of local produce	2.92	26
6	Activities – Range	3.20	13	**21**	Tourist Information Centre - Ease of finding	3.34	9
7	Activities – Value	3.06	22	**22**	Tourist Information Centre - Quality of service	3.37	8
8	Transport on St. Mary's – Quality	3.24	12	**23**	Tourist Information Centre - Usefulness of information	3.38	7
9	Transport on St. Mary's – Value	3.11	17	**24**	Public toilets – availability	3.03	23
10	Food & drink – Quality	3.29	10	**25**	Public toilets – Cleanliness	3.09	18
11	Food & drink – Range	3.14	15	**26**	Signposting	3.09	19
12	Food & drink – Value	2.95	25	**27**	Maps/Information Boards	3.13	16
13	Food & drink - Availability/use of local produce	3.18	14	**28**	Cleanliness of Streets	3.50	5
14	Evening entertainment – Quality	2.70	29	**29**	General Atmosphere	3.74	1
15	Evening entertainment - Range	2.55	30	**30**	Sense of Welcome	3.64	2

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

The highest levels of satisfaction were for the general atmosphere (3.74) and sense of welcome (3.64). The lowest levels of satisfaction were with the quality and range of evening entertainment (2.70 and 2.55 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 the range and quality of grocery provision, value of food & drink, quality of shops and range and quality of evening entertainment.



More visitor satisfaction scores increased compared with 2016 than remained level. Only six scores decreased compared with 2016.

#	Indicator	2017	2016	#	Indicator	2017	2016
1	Accommodation – Facilities	**3.50**	3.45	16	Shops - Quality	**3.08**	2.84
2	Accommodation – Quality*	**3.46**	n/a	17	Shops - Range	**2.86**	3.00
3	Accommodation - Service	**3.50**	3.51	18	Grocery provision - Quality	**3.00**	2.86
4	Accommodation - Value	**3.07**	3.10	19	Grocery provision - Range	**2.85**	2.96
5	Activities - Quality	**3.26**	3.19	20	Grocery provision - Availability of local produce*	**2.92**	n/a
6	Activities - Range	**3.20**	3.22	21	Tourist Information Centre - Ease of finding	**3.34**	3.07
7	Activities - Value	**3.06**	3.02	22	Tourist Information Centre - Quality of service	**3.37**	3.10
8	Transport on St. Mary's - Quality	**3.24**	3.14	23	Tourist Information Centre - Usefulness of information	**3.38**	3.22
9	Transport on St. Mary's - Value	**3.11**	3.04	24	Public toilets - availability	**3.03**	3.25
10	Food & drink - Quality	**3.29**	3.19	25	Public toilets - Cleanliness	**3.09**	3.27
11	Food & drink - Range	**3.14**	3.26	26	Signposting	**3.09**	3.00
12	Food & drink - Value	**2.95**	2.95	27	Maps/Information Boards	**3.13**	3.08
13	Food & drink - Availability/use of local produce*	**3.18**	n/a	28	Cleanliness of Streets	**3.50**	3.47
14	Evening entertainment - Quality	**2.70**	2.58	29	General Atmosphere	**3.74**	3.72
15	Evening entertainment - Range	**2.55**	2.66	30	Sense of Welcome	**3.64**	3.61

Score increased by more than + 0.05 compared with 2015

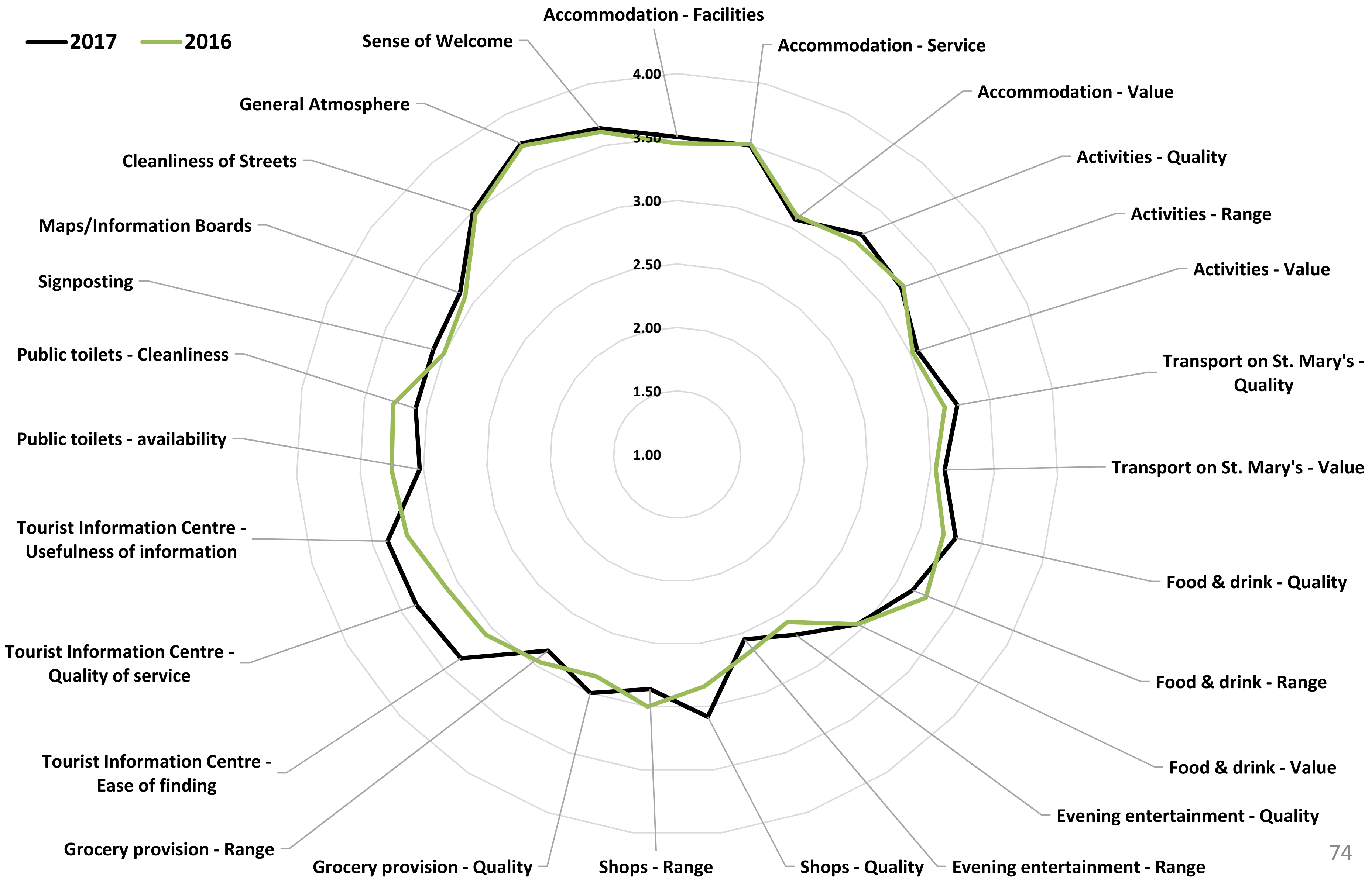
Score level or within +/- 0.05 compared with 2015

Score decreased by more than -0.05 compared with 2015

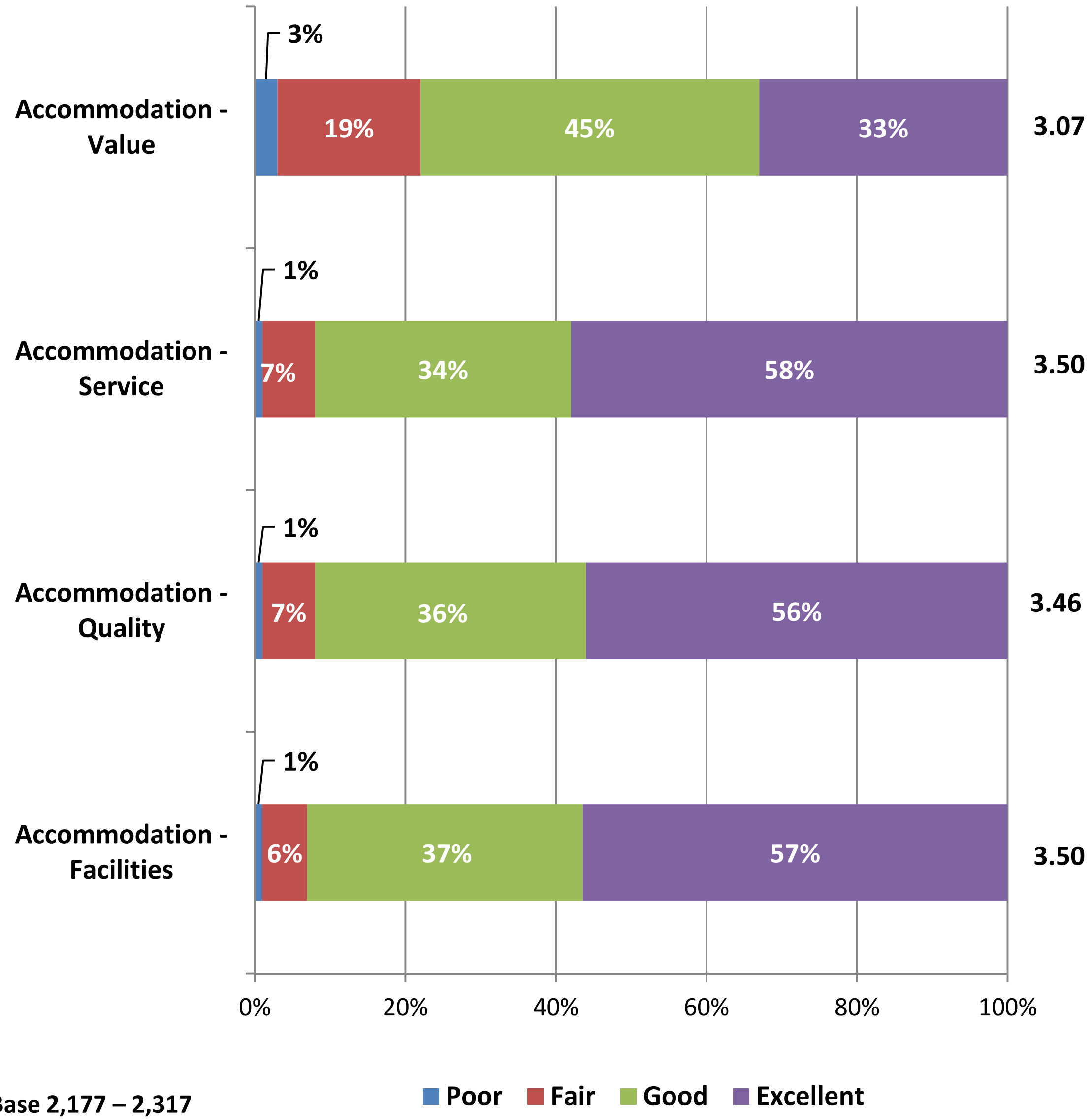
*** New indicator explored for the first time during 2017.**

More visitor satisfaction scores increased compared with 2016 than remained level. The quality of activities, quality and value of transport on St. Mary's, quality of food & drink, the quality of evening entertainment, the quality of the shops, the quality of the grocery provision, all aspects of the tourist information centre and signposting all increased by +0.05 or more compared with 2016 scores. Only six scores decreased compared with 2016 including the range of food & drink, range of evening entertainment, range of shops, range of grocery provision and availability and cleanliness of the public toilets all of which decreased by -0.05 or more compared with the 2016. The radar chart overleaf displays the mean average scores for each indicator in a visual format for both 2017 and 2016.

11 out of the 27 indicators explored in terms of visitor satisfaction with the Isles of Scilly during 2017 increased in satisfaction compared with 2016. 10 indicators remained at the same level as last year and 6 indicators decreased in satisfaction compared with 2016.



The mean satisfaction scores calculated for all aspects of accommodation on the Islands were high. Scores ranged from 3.07 for value to 3.50 for facilities and service.



Base 2,177 – 2,317

94% of visitors rated the facilities at their accommodation on the Islands as 'good' or 'excellent', as did 92% in each case for the service at their accommodation and the quality of their accommodation and 78% in terms of value.

19% of visitors rated the value 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 3.07 out of 4.00 for value to 3.50 for both facilities and service (third and fourth highest ranked indictors in each case of all those explored during the 2017 survey).

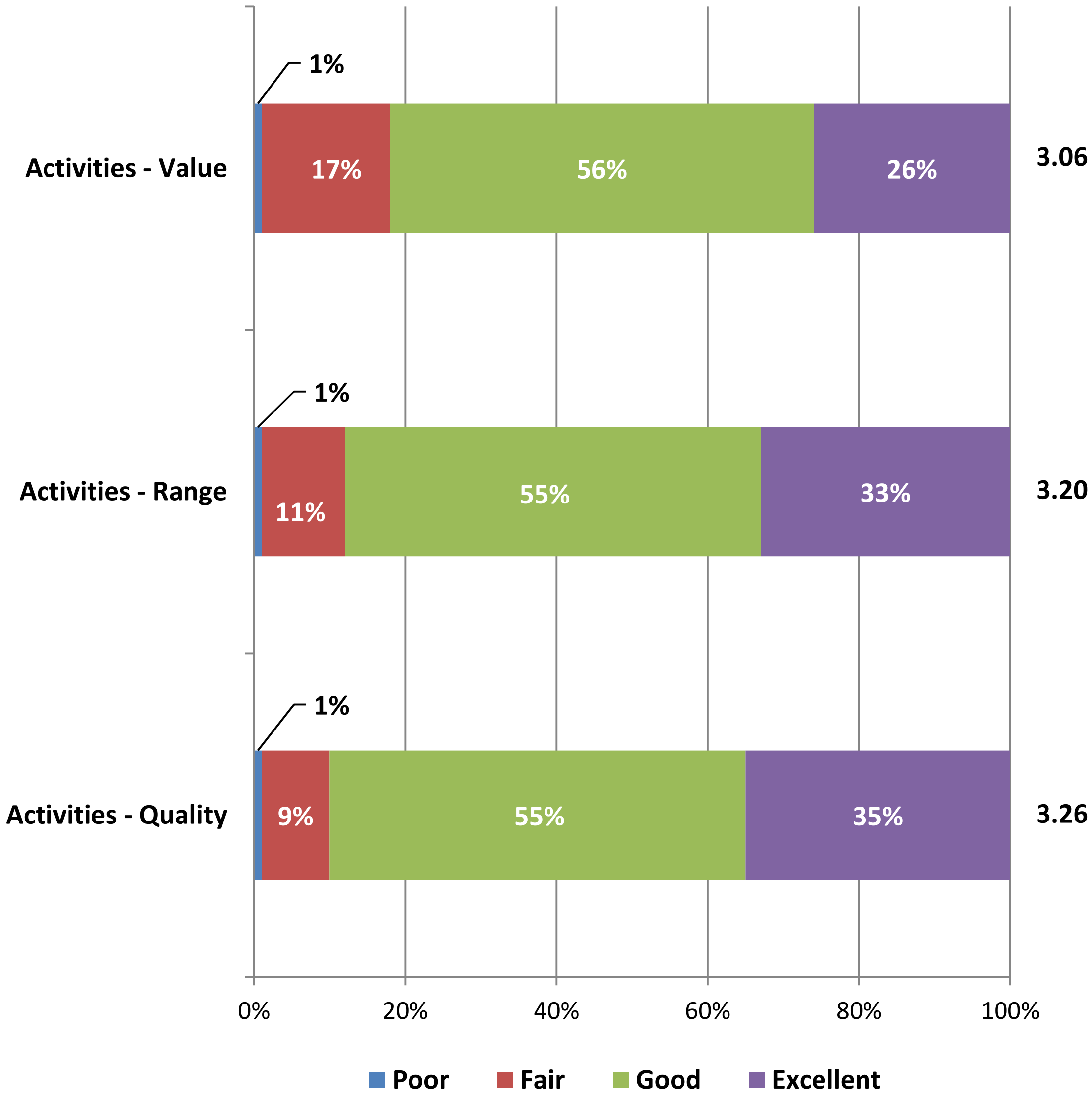
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2016. Please note that quality of accommodation was explored for the first time during the 2017 survey.

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 a short break, those staying on Bryher, those who had travelled by Skybus and those staying 5-7 days on the Islands.

Accommodation - mean satisfaction scores (out of a max. of 4.00)	Facilities	Quality	Service	Value
JAN-MAR	3.71	3.69	3.73	2.92
APR-JUN	3.49	3.47	3.49	3.07
JUL-SEP	3.48	3.44	3.49	3.07
OCT-DEC	3.57	3.55	3.53	3.19
FIRST TIME	3.44	3.43	3.49	3.08
REPEAT	3.51	3.47	3.50	3.07
MAIN	3.50	3.46	3.50	3.10
SECOND	3.47	3.44	3.46	3.01
SHORT	3.52	3.51	3.55	3.07
ST MARY'S	3.46	3.41	3.45	3.06
ST AGNES	3.49	3.46	3.55	3.22
BRYHER	3.63	3.64	3.67	3.22
TRESCO	3.63	3.61	3.62	3.03
ST MARTIN'S	3.49	3.49	3.56	3.15
SKYBUS	3.52	3.50	3.55	3.09
SCILLONIAN	3.49	3.44	3.47	3.07
PRIVATE	3.37	3.50	3.50	3.12
CRUISE	3.38	3.43	3.25	3.00
OTHER TRANSPORT	3.37	3.29	3.34	2.96
2-4 DAYS	3.50	3.48	3.58	3.07
5-7 DAYS	3.51	3.48	3.49	3.08
8+ DAYS	3.47	3.42	3.47	3.06
2017	3.50	3.46	3.50	3.07
2016	3.45	n/a	3.51	3.10

Analysis segment ranking the individual factor the highest

The mean satisfaction scores calculated for all aspects of activities on the Islands were high. Scores ranged from 3.06 out of 4.00 for value to 3.26 for the quality of the activities.



Base 1,788-1,848

90% of visitors rated the quality of the activities on the Islands as 'good' or 'excellent', as did 88% for the range of activities and 82% in terms of value for money.

17% of visitors rated the value of the activities on the Islands as 'fair' and 1% as 'poor'.

The mean satisfaction scores calculated for all aspects of activities on the Islands were high. Scores ranged from 3.06 out of 4.00 for value to 3.26 for the quality of the activities (eleventh highest ranked indicator of all those explored during the 2017 survey).

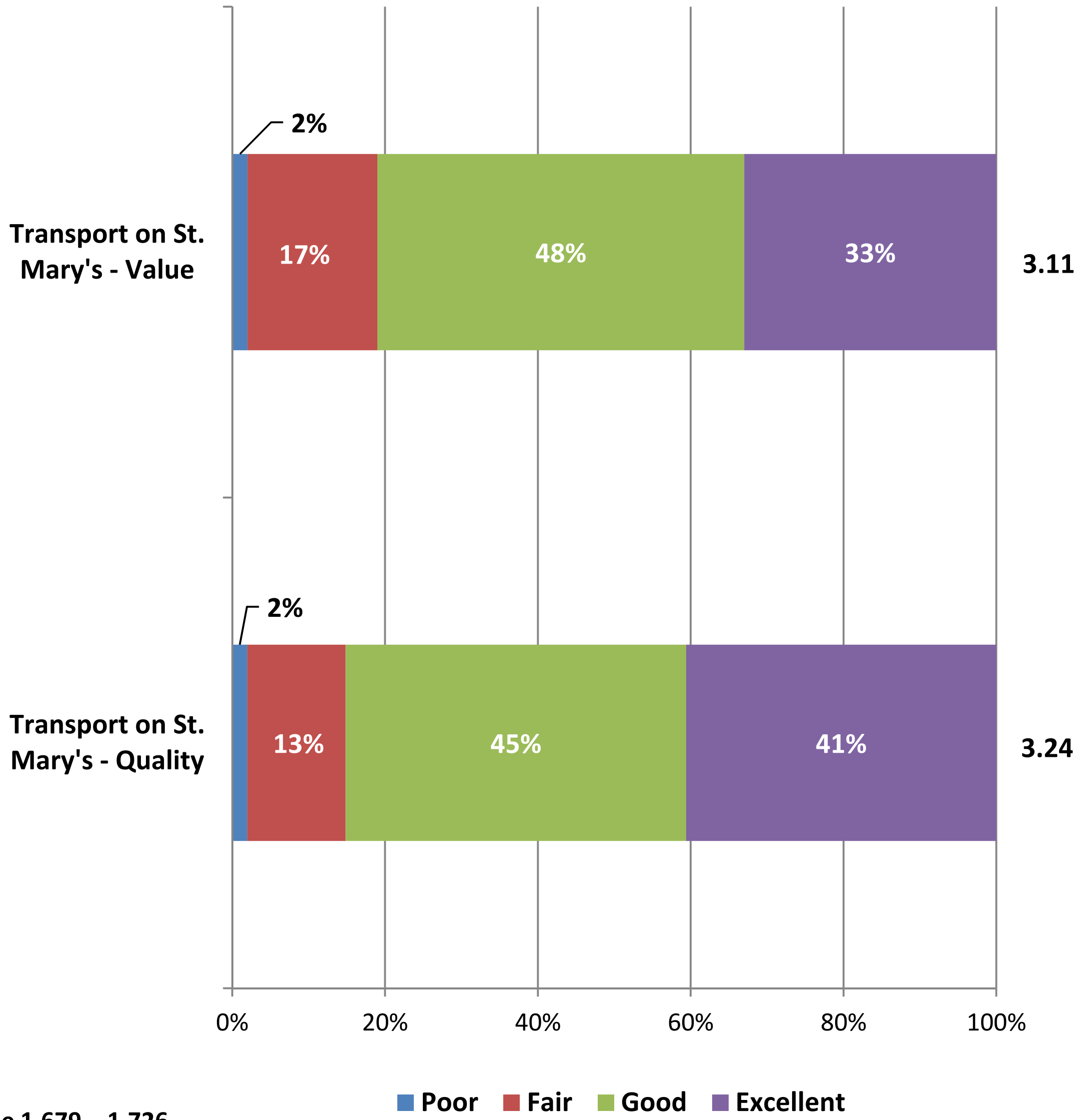
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2016.

On the whole, levels of satisfaction with the different aspects of activities on the Islands were highest amongst day visitors, July to September visitors, repeat visitors, those on their main holiday of the year, those staying on St. Agnes, those who arrived by private transport and those staying for 8+ days on the Islands.

Activities - mean satisfaction scores (out of a max. of 4.00)	Quality	Range	Value
STAYING	3.26	3.20	3.06
DAY	3.16	3.23	3.14
JAN-MAR	3.11	2.95	2.84
APR-JUN	3.25	3.21	3.05
JUL-SEP	3.28	3.22	3.08
OCT-DEC	3.17	3.10	3.04
FIRST TIME	3.22	3.14	3.08
REPEAT	3.27	3.22	3.06
MAIN	3.30	3.24	3.09
SECOND	3.20	3.16	3.01
SHORT	3.18	3.11	3.02
ST MARY’S	3.25	3.20	3.06
ST AGNES	3.38	3.32	3.18
BRYHER	3.35	3.32	3.16
TRESCO	3.33	3.21	3.10
ST MARTIN’S	3.28	3.17	3.04
SKYBUS	3.25	3.21	3.07
SCILLONIAN	3.28	3.21	3.06
PRIVATE	3.33	3.24	3.40
CRUISE	3.17	3.42	3.08
OTHER TRANSPORT	3.03	2.95	2.97
2-4 DAYS	3.20	3.12	3.01
5-7 DAYS	3.26	3.20	3.08
8+ DAYS	3.29	3.24	3.04
2017	3.26	3.20	3.06
2016	3.19	3.22	3.02

Analysis segment ranking the individual factor the highest

The mean satisfaction scores calculated for both aspects of transport on St. Mary's were high.



Base 1,679 – 1,726

In terms of transport on St. Mary's, 86% of visitors rated the quality as 'good' or 'excellent' whilst 81% said the same in terms of value.

The quality and value of the transport on St. Mary's was rated 'fair' by 13% and 17% of visitors respectively and as 'poor' by 2% of visitors in each case.

The mean satisfaction scores calculated for both aspects of transport on St. Mary's were good. Scores ranged from 3.11 for value to 3.24 for quality of service of transport on St. Mary's.

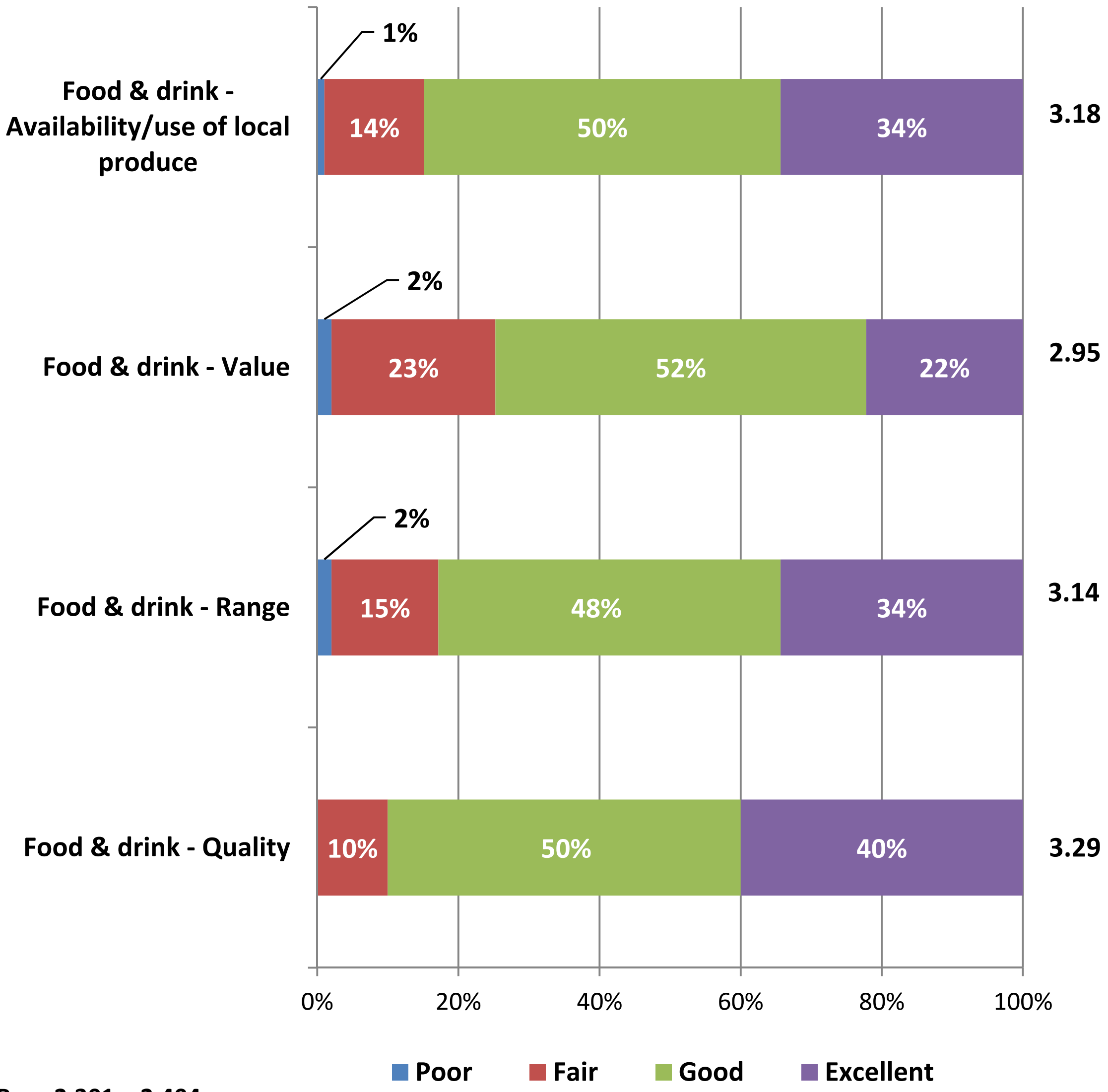
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2016.

On the whole, levels of satisfaction with the transport on St. Mary's were highest amongst those visiting during January to March, those on a short break, those staying on Tresco, cruise ship passengers and those staying 5-7 days on the Islands.

Transport on St. Mary's - mean satisfaction scores (out of a max. of 4.00)	Quality	Value
STAYING	3.24	3.11
DAY	3.15	3.21
JAN-MAR	3.34	3.18
APR-JUN	3.25	3.10
JUL-SEP	3.22	3.12
OCT-DEC	3.26	3.18
FIRST TIME	3.23	3.18
REPEAT	3.24	3.09
MAIN	3.25	3.12
SECOND	3.22	3.07
SHORT	3.26	3.14
ST MARY'S	3.20	3.09
ST AGNES	3.23	3.17
BRYHER	3.34	3.19
TRESCO	3.37	3.21
ST MARTIN'S	3.22	3.09
SKYBUS	3.33	3.16
SCILLONIAN	3.13	3.07
PRIVATE	3.27	3.36
CRUISE	3.40	3.36
OTHER TRANSPORT	3.18	3.00
2-4 DAYS	3.23	3.08
5-7 DAYS	3.27	3.15
8+ DAYS	3.20	3.05
2017	3.24	3.11
2016	3.14	3.04

Analysis segment ranking the individual factor the highest

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



Base 2,301 – 2,404

90% of visitors rated the quality of the food & drink on the Islands as 'good' or 'excellent', as did 82% for the range, 74% for value and 84% for the availability/use of local produce.

23% of visitors rated the value of the food & drink on the Islands as 'fair' and 2% as 'poor'.

With the exception of the value for money, the mean satisfaction scores calculated for all aspects of food & drink on the Islands were high, ranging from 3.14 out of 4.00 for the range of food & drink to 3.29 for the quality of the food & drink.

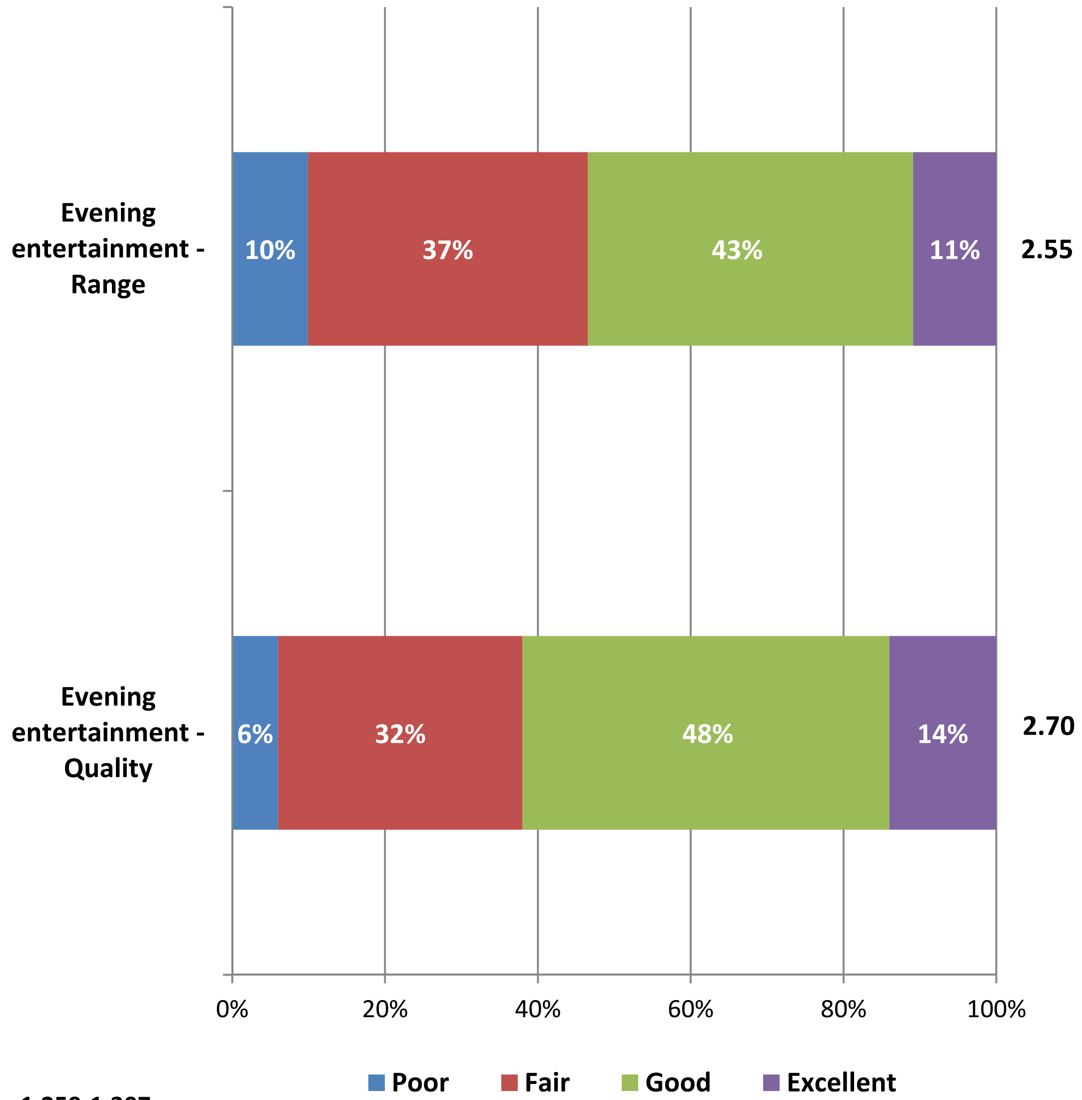
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2016. Please note that the availability/use of local produce was explored for the first time during the 2017 survey.

On the whole, levels of satisfaction with the food & drink on the Islands were highest amongst day visitors, January to March and July to September visitors, repeat visitors, those on their main holiday of the year, those staying on Bryher, those arriving on private transport or as part of a cruise and those staying 5-7 days.

Food & drink - mean satisfaction scores (out of a max. of 4.00)	Quality	Range	Value	Availability/use of local produce
STAYING	3.28	3.14	2.94	3.17
DAY	3.43	3.27	3.10	3.24
JAN-MAR	3.35	3.10	3.06	3.15
APR-JUN	3.28	3.16	2.96	3.18
JUL-SEP	3.31	3.16	2.94	3.19
OCT-DEC	3.17	2.97	2.87	3.08
FIRST TIME	3.27	3.12	2.99	3.17
REPEAT	3.29	3.15	2.93	3.18
MAIN	3.33	3.19	2.96	3.21
SECOND	3.21	3.05	2.91	3.11
SHORT	3.21	3.07	2.94	3.15
ST MARY'S	3.26	3.13	2.93	3.15
ST AGNES	3.39	3.16	2.97	3.31
BRYHER	3.47	3.27	3.02	3.36
TRESCO	3.38	3.18	2.95	3.27
ST MARTIN'S	3.33	3.16	2.95	3.22
SKYBUS	3.29	3.16	2.98	3.19
SCILLONIAN	3.28	3.13	2.92	3.18
PRIVATE	3.45	3.36	3.07	3.33
CRUISE	3.22	3.00	3.22	3.35
OTHER TRANSPORT	3.29	3.10	2.95	3.05
2-4 DAYS	3.23	3.06	2.93	3.17
5-7 DAYS	3.29	3.16	2.98	3.18
8+ DAYS	3.28	3.12	2.87	3.17
2017	3.29	3.14	2.95	3.18
2016	3.19	3.26	2.95	n/a

Analysis segment ranking the individual factor the highest

The two mean satisfaction scores calculated for evening entertainment on the Islands were the lowest of all the indicators explored during the 2017 survey as was the case during 2016 & 2015.



Base 1,259-1,307

62% of visitors rated the quality of the evening entertainment on the Islands as 'good' or 'excellent', as did 54% in terms of the range.

37% of visitors rated the range of evening entertainment on the Islands as 'fair' and 10% as 'poor'. The quality of evening entertainment on the Islands was rated as 'fair' or 'poor' by 32% and 6% of visitors respectively.

The two mean satisfaction scores calculated for evening entertainment on the Islands were the lowest of all the indicators explored during the 2017 survey at 2.70 out of 4.00 for the quality of evening entertainment and 2.55 in terms of quality. This was also the case during the 2016 and 2015 surveys.

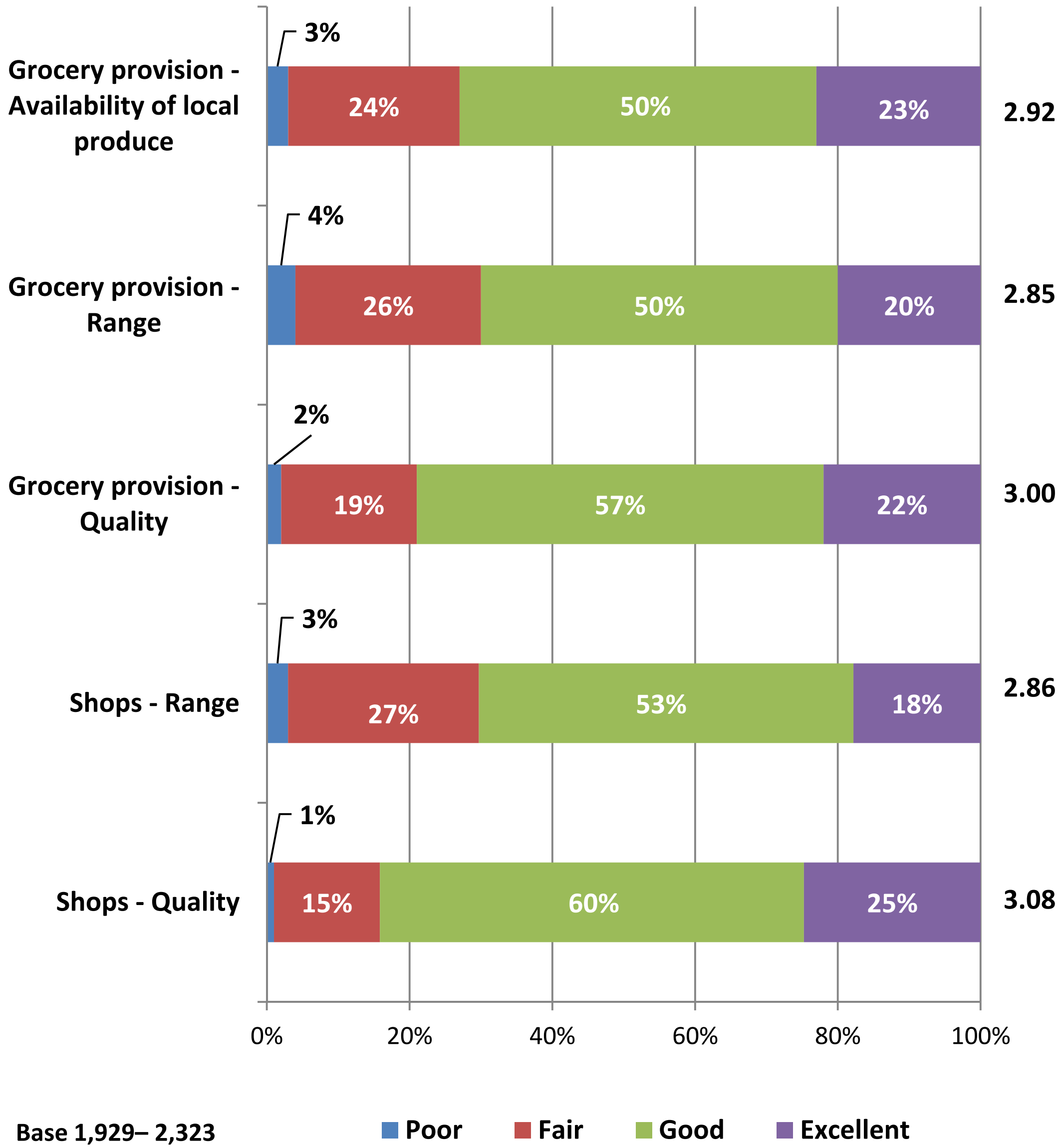
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2016.

On the whole, levels of satisfaction with evening entertainment on the Islands were highest amongst day visitors, July to September visitors, repeat visitors, those on their main holiday of the year, those staying on St. Agnes, those arriving on a cruise ship and those staying 8+ days on the Islands.

Evening entertainment- mean satisfaction scores (out of a max. of 4.00)	Quality	Range
STAYING	2.70	2.55
DAY	2.89	2.72
JAN-MAR	2.73	2.46
APR-JUN	2.65	2.52
JUL-SEP	2.75	2.59
OCT-DEC	2.62	2.52
FIRST TIME	2.62	2.50
REPEAT	2.72	2.57
MAIN	2.75	2.58
SECOND	2.61	2.48
SHORT	2.68	2.57
ST MARY'S	2.68	2.53
ST AGNES	2.86	2.76
BRYHER	2.84	2.63
TRESCO	2.85	2.70
ST MARTIN'S	2.75	2.57
SKYBUS	2.70	2.56
SCILLONIAN	2.72	2.57
PRIVATE	2.60	2.62
CRUISE	3.00	3.00
OTHER TRANSPORT	2.55	2.39
2-4 DAYS	2.66	2.53
5-7 DAYS	2.68	2.54
8+ DAYS	2.74	2.58
2017	2.70	2.55
2016	2.58	2.66

Analysis segment ranking the individual factor the highest

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



85% of visitors rated the quality of shops on the Islands as 'good' or 'excellent', as did 71% for the range of shops. 79% rated the quality of the grocery provision as 'good' or 'excellent' as did 70% for the range of the grocery provision and 73% for the availability of local produce.

27% of visitors rated the range of shops as 'fair' as did 26% for the range of grocery provision. 15% of visitors rated the quality of the shops as 'fair', as did 19% for the quality of the grocery provision and 24% for the availability of local produce.

The mean satisfaction scores calculated for all aspects of shopping on the Islands were fair to good and ranged from 2.86 out of 4.00 for the range of shops (fourth lowest ranked indictor of all those explored during the 2017 survey) to 3.08 for the quality of the shops. The quality and range of the grocery provision received average scores of 3.00 (seventh lowest ranked indicator) and 2.85 (third lowest ranked indicator) respectively.

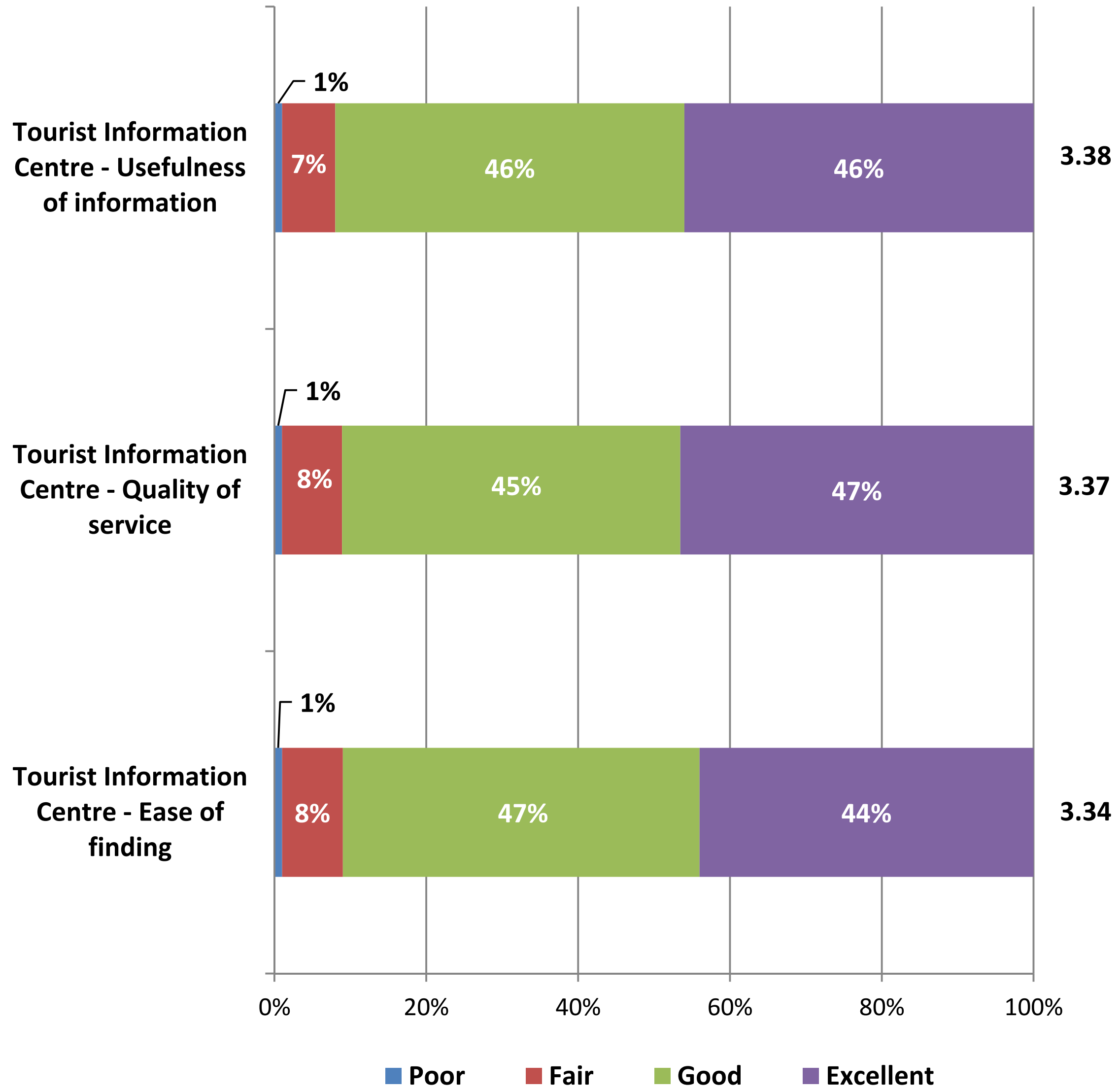
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2016. Please note that the grocery provision - availability/use of local produce was explored for the first time during the 2017 survey.

On the whole, levels of satisfaction with shopping provision on the Islands were highest amongst day visitors, January to March visitors, those on their main holiday of the year, those staying on Bryher, those arriving on a cruise and those spending 5-7 days on the Islands.

Shopping - mean satisfaction scores (out of a max. of 4.00)	Quality of shops	Range of shops	Quality of grocery provision shops	Range of grocery provision shops	Grocery provision - Availability of local produce
STAYING	3.07	2.85	2.99	2.85	2.92
DAY	3.20	3.00	3.10	2.94	3.02
JAN-MAR	3.02	2.62	3.16	3.05	2.98
APR-JUN	3.06	2.85	2.95	2.80	2.91
JUL-SEP	3.11	2.88	3.03	2.87	2.92
OCT-DEC	2.98	2.75	3.01	2.94	2.98
FIRST TIME	3.06	2.83	3.00	2.87	2.96
REPEAT	3.09	2.86	3.00	2.85	2.91
MAIN	3.11	2.90	3.01	2.85	2.95
SECOND	3.03	2.78	2.98	2.86	2.88
SHORT	3.01	2.79	2.94	2.81	2.86
ST MARY'S	3.06	2.84	2.96	2.80	2.85
ST AGNES	3.10	2.88	3.09	2.93	3.18
BRYHER	3.23	3.01	3.17	3.03	3.21
TRESCO	3.16	2.85	3.16	2.99	3.07
ST MARTIN'S	3.09	2.85	3.03	2.85	2.96
SKYBUS	3.08	2.86	3.01	2.86	2.94
SCILLONIAN	3.09	2.86	2.99	2.84	2.90
PRIVATE	3.07	2.75	3.04	2.85	2.96
CRUISE	3.24	3.11	3.29	3.00	3.14
OTHER TRANSPORT	2.98	2.78	2.93	2.85	2.90
2-4 DAYS	3.02	2.83	3.00	2.89	2.95
5-7 DAYS	3.09	2.85	3.01	2.87	2.95
8+ DAYS	3.07	2.85	2.97	2.79	2.85
2017	3.08	2.86	3.00	2.85	2.92
2016	2.84	3.00	2.86	2.96	

Analysis segment ranking the individual factor the highest

The mean satisfaction scores calculated for all aspects of the TIC were good.



Base 1,925 – 2,110

In terms of the Tourist Information Centre (TIC), 91% rated the ease of finding it as 'good' or 'excellent', 92% in each case rated it the same in terms of quality of service and the usefulness of the information they received.

The mean satisfaction scores calculated for all aspects of the TIC were very high and all were in the top 10 satisfaction scores for 2017. Scores ranged from 3.34 out of 4.00 for the ease of finding the TIC to 3.38 for the usefulness of the information received at the TIC. The quality of service at the TIC achieved an average score of 3.37 out of 4.00.

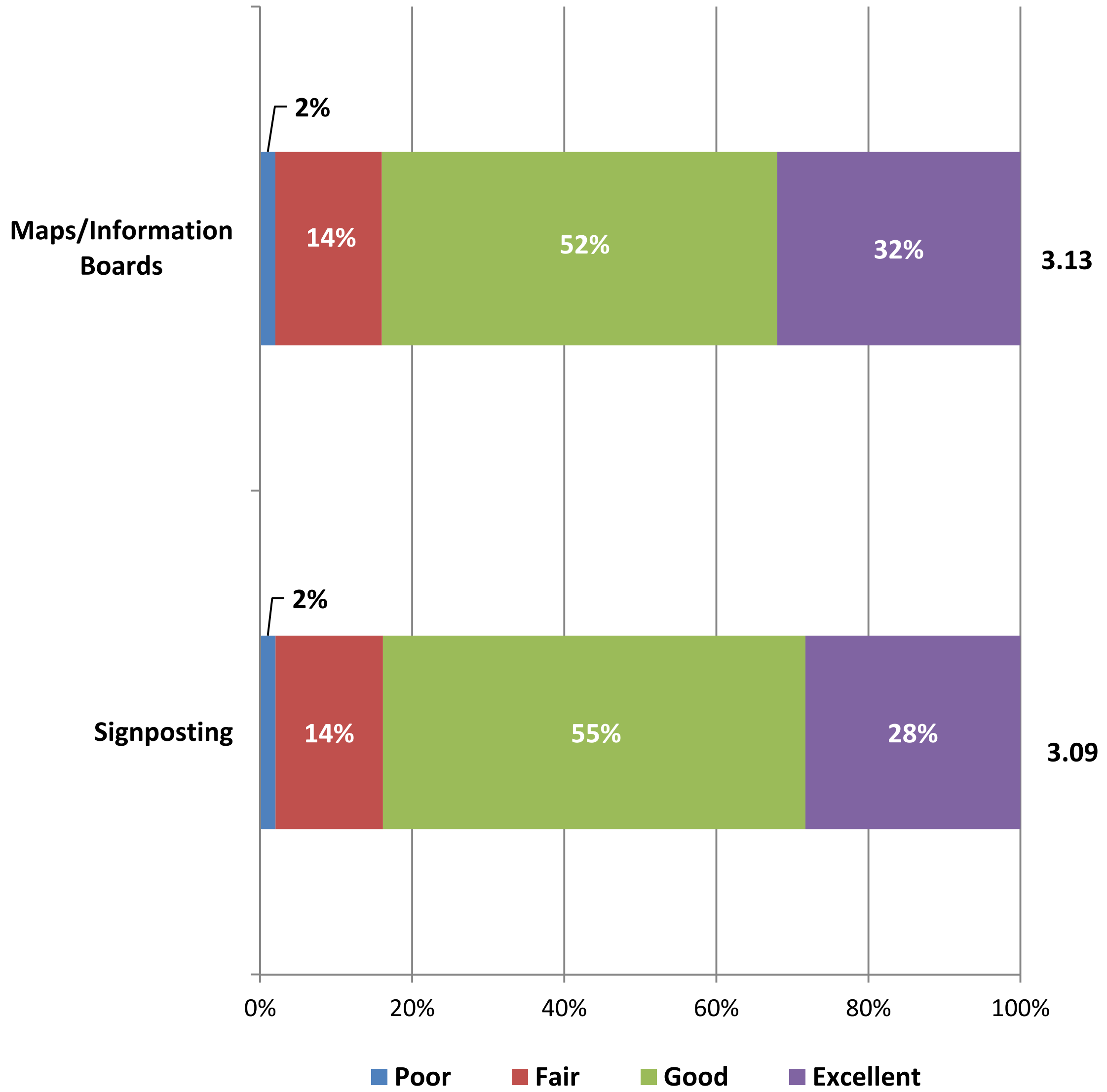
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2016.

On the whole, levels of satisfaction with the TIC were highest amongst staying visitors, July to September visitors, repeat visitors, those on their main holiday of the year, those staying on St Agnes or Tresco, those arriving on a cruise ship and those staying 8+ days.

TIC- mean satisfaction scores (out of a max. of 4.00)	Tourist Information Centre - Ease of Finding	Tourist Information Centre - Quality of Service	Tourist Information Centre - Usefulness of Information
STAYING	3.34	3.37	3.38
DAY	3.33	3.29	3.30
JAN-MAR	3.32	3.43	3.31
APR-JUN	3.30	3.34	3.36
JUL-SEP	3.38	3.40	3.41
OCT-DEC	3.21	3.21	3.29
FIRST TIME	3.29	3.33	3.34
REPEAT	3.36	3.38	3.39
MAIN	3.36	3.40	3.41
SECOND	3.33	3.35	3.36
SHORT	3.29	3.32	3.34
ST MARY'S	3.35	3.38	3.39
ST AGNES	3.42	3.49	3.51
BRYHER	3.36	3.45	3.44
TRESCO	3.42	3.50	3.49
ST MARTIN'S	3.41	3.50	3.51
SKYBUS	3.37	3.40	3.39
SCILLONIAN	3.32	3.35	3.37
PRIVATE	3.45	3.60	3.55
CRUISE	3.31	3.64	3.64
OTHER TRANSPORT	3.26	3.26	3.25
2-4 DAYS	3.30	3.39	3.42
5-7 DAYS	3.35	3.35	3.36
8+ DAYS	3.35	3.41	3.42
2017	3.34	3.37	3.38
2016	3.07	3.10	3.22

Analysis segment ranking the individual factor the highest

The mean satisfaction scores calculated for both aspects of the ease of finding your way around were good.



Base 2,285 – 2,330

83% of visitors rated the signposting on the Islands as 'good' or 'excellent', compared with 84% for the maps/information boards. The signposting and maps/information boards on the Islands were rated as 'fair' by 14% of visitors in each case.

The mean satisfaction scores calculated for both aspects of the ease of finding your way around were good. Scores ranged from 3.09 out of 4.00 for signposting to 3.13 for the maps/information boards.

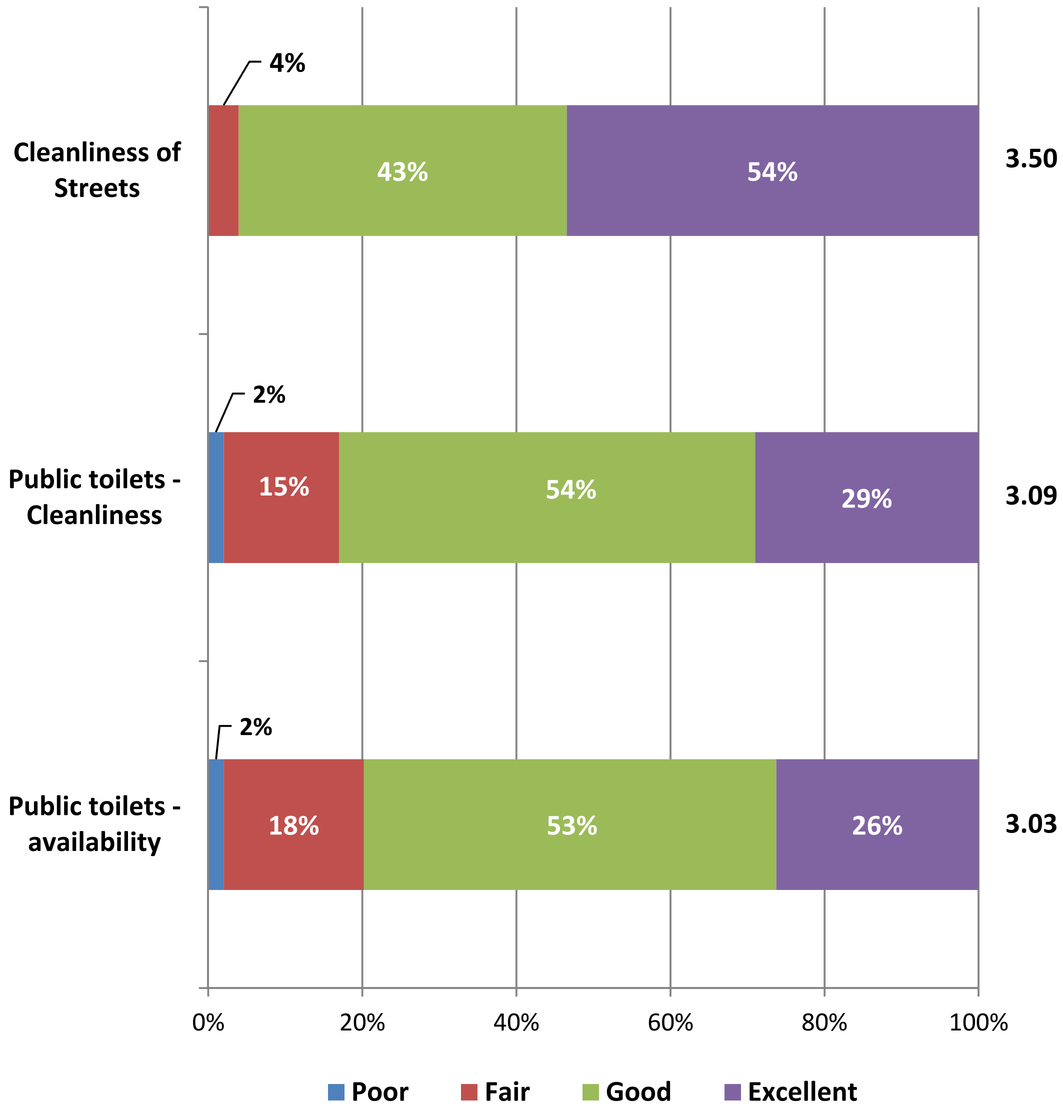
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2016.

On the whole, levels of satisfaction with ease of finding way around were highest amongst day visitors, January to March and July to September visitors, repeat visitors, those on their main holiday of the year, those staying on St Agnes and Tresco, those arriving on a cruise ship and those staying 5-7 days.

Ease of finding way around - mean satisfaction scores (out of a max. of 4.00)	Signposting	Maps/ Information Boards
STAYING	3.09	3.13
DAY	3.10	3.13
JAN-MAR	3.20	3.10
APR-JUN	3.12	3.13
JUL-SEP	3.08	3.15
OCT-DEC	3.03	3.05
FIRST TIME	3.04	3.07
REPEAT	3.11	3.16
MAIN	3.09	3.15
SECOND	3.09	3.12
SHORT	3.08	3.10
ST MARY’S	3.06	3.11
ST AGNES	3.15	3.31
BRYHER	3.14	3.28
TRESCO	3.20	3.27
ST MARTIN’S	3.09	3.25
SKYBUS	3.12	3.13
SCILLONIAN	3.07	3.14
PRIVATE	3.08	3.26
CRUISE	3.42	3.26
OTHER TRANSPORT	3.07	3.02
2-4 DAYS	3.09	3.10
5-7 DAYS	3.12	3.15
8+ DAYS	3.05	3.12
2017	3.09	3.13
2016	3.00	3.08

Analysis segment ranking the individual factor the highest

The mean satisfaction scores for the public toilets and cleanliness of the streets on the Islands were rated highly with the cleanliness of the streets ranked the fifth highest indicator of all those explored in terms of satisfaction during the 2017 survey.



Base 2,164 – 2,364

79% of visitors rated the availability of the public toilets on the Islands as 'good' or 'excellent' compared with 83% who said the same for their cleanliness. 97% of visitors rated the cleanliness of the streets as 'good' or 'excellent'.

18% of visitors rated the availability of the public toilets as 'fair', compared with 15% who said the same in terms of their cleanliness.

The mean satisfaction scores for the availability and cleanliness of the public toilets (3.03 and 3.09 respectively) and the cleanliness of the streets on the Islands (3.50) were all good. The cleanliness of the streets was ranked the fifth highest indicator of all those explored in terms of satisfaction during the 2017 survey.

At 3.03 the availability of public toilets on the Islands was the eighth lowest ranked indicator in terms of satisfaction during the 2017 survey.

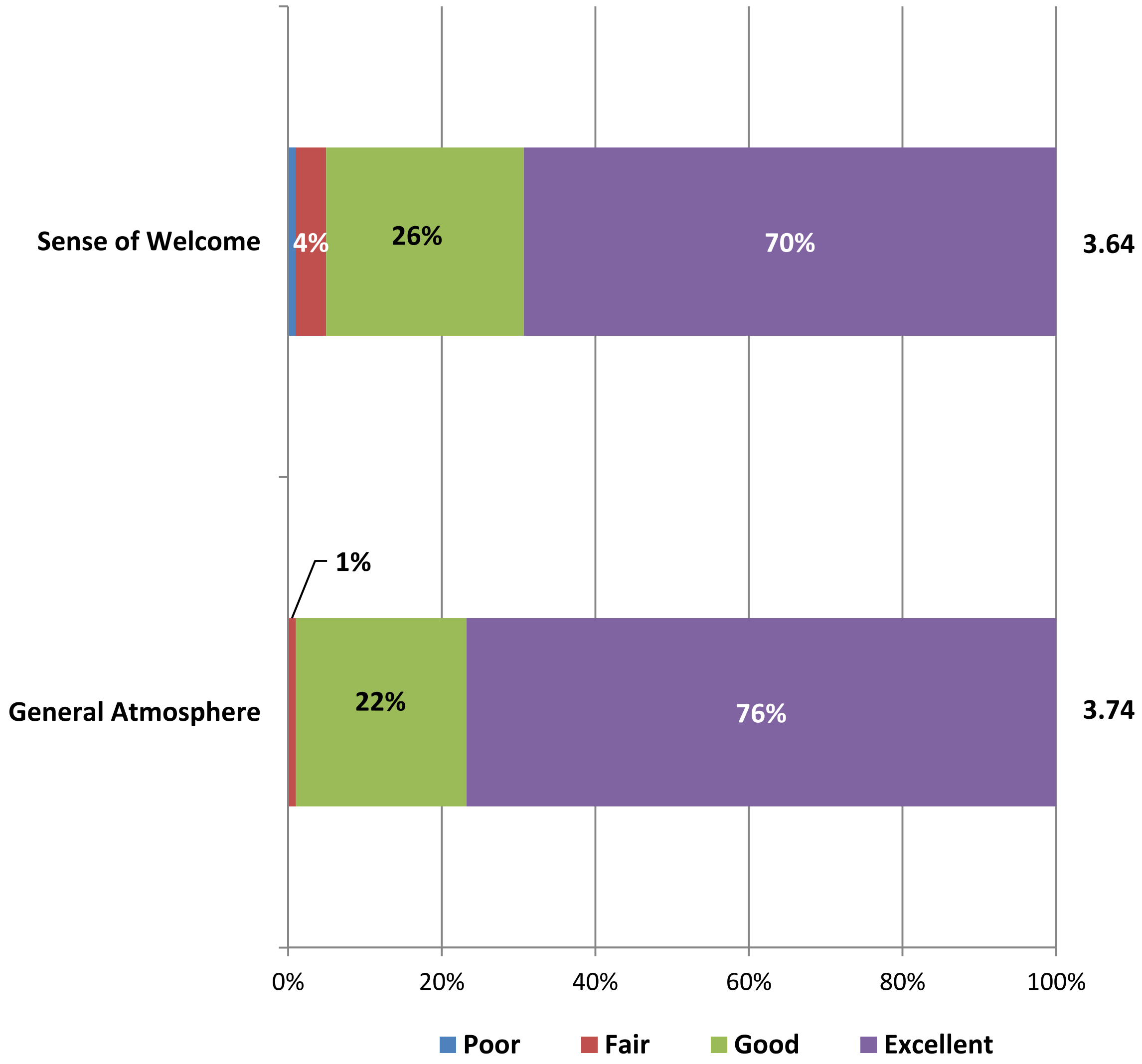
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2016.

On the whole, levels of satisfaction with public toilets and cleanliness of the streets were highest amongst day visitors, July to September visitors, first time visitors, those on their main holiday, those staying on St. Agnes and those arriving on private transport.

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
STAYING	3.02	3.08	3.49
DAY	3.17	3.27	3.57
JAN-MAR	2.95	3.00	3.50
APR-JUN	2.99	3.08	3.49
JUL-SEP	3.07	3.11	3.50
OCT-DEC	2.96	3.02	3.49
FIRST TIME	3.05	3.12	3.55
REPEAT	3.02	3.08	3.48
MAIN	3.05	3.10	3.52
SECOND	3.00	3.10	3.46
SHORT	2.97	3.00	3.46
ST MARY’S	3.04	3.09	3.49
ST AGNES	3.16	3.19	3.60
BRYHER	3.05	3.06	3.49
TRESCO	3.03	3.13	3.56
ST MARTIN’S	3.11	3.14	3.54
SKYBUS	2.99	3.02	3.48
SCILLONIAN	3.06	3.16	3.51
PRIVATE	3.33	3.39	3.64
CRUISE	3.11	3.21	3.61
OTHER TRANSPORT	2.98	2.97	3.41
2-4 DAYS	2.96	3.05	3.51
5-7 DAYS	3.02	3.11	3.50
8+ DAYS	3.04	3.05	3.46
2017	3.03	3.09	3.50
2016	3.25	3.27	3.47

Analysis segment ranking the individual factor the highest

The general atmosphere and sense of welcome on the Islands were the two highest ranked indicators amongst visitors explored by the 2017 survey.



Base 2,327 – 2,333

98% of visitors rated the general atmosphere on the Islands as 'good' or 'excellent', as did 96% for the sense of welcome on the Islands.

Only 4% of visitors rated the sense of welcome as 'fair', compared with 1% of visitors doing so for the general atmosphere.

At 3.74 out of 4.00 for the general atmosphere and 3.64 for the sense of welcome on the Islands, these were the two highest ranked indicators amongst visitors explored by the 2017 survey.

The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2017.

On the whole, levels of satisfaction with the general atmosphere and sense of welcome on the Islands were highest amongst staying visitors, January to March visitors, those on their main holiday of the year, and those staying on Bryher.

General atmosphere and sense of welcome- mean satisfaction scores (out of a max. of 4.00)	General atmosphere	Sense of welcome
STAYING	3.75	3.65
DAY	3.66	3.53
JAN-MAR	3.77	3.87
APR-JUN	3.74	3.65
JUL-SEP	3.74	3.64
OCT-DEC	3.71	3.54
FIRST TIME	3.71	3.66
REPEAT	3.75	3.64
MAIN	3.76	3.67
SECOND	3.73	3.62
SHORT	3.69	3.62
ST MARY'S	3.74	3.64
ST AGNES	3.77	3.69
BRYHER	3.78	3.70
TRESCO	3.78	3.69
ST MARTIN'S	3.74	3.63
SKYBUS	3.75	3.69
SCILLONIAN	3.74	3.61
PRIVATE	3.73	3.74
CRUISE	3.61	3.48
OTHER TRANSPORT	3.71	3.54
2-4 DAYS	3.72	3.64
5-7 DAYS	3.74	3.65
8+ DAYS	3.76	3.64
2017	3.74	3.64
2016	3.72	3.61

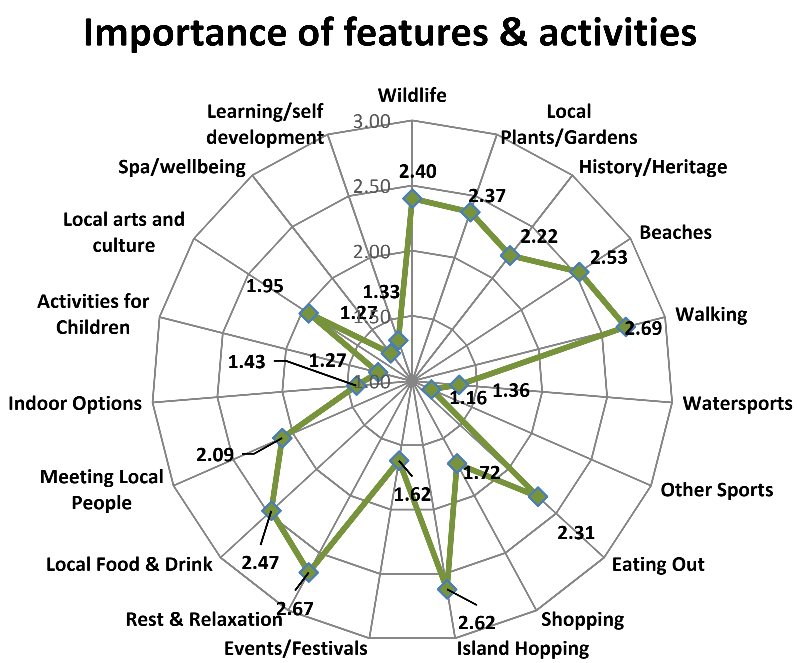
Analysis segment ranking the individual factor the highest

The features and activities on the Islands which visitors considered of highest importance to them were walking, rest and relaxation, island-hopping, the beaches, local food & drink and wildlife.

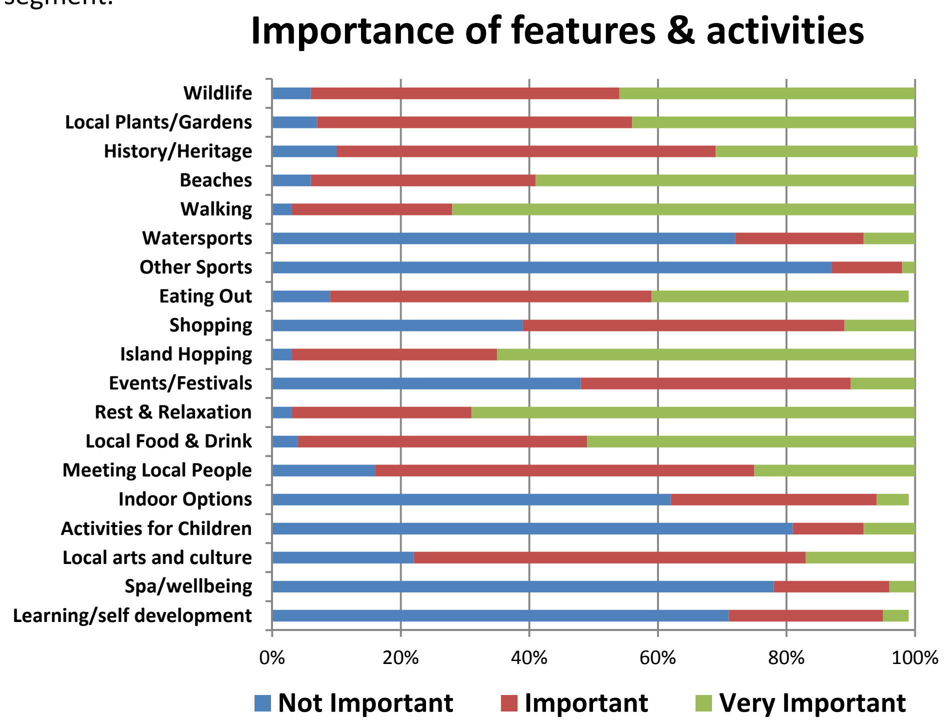
Visitors were asked to consider a number of features and activities that can be enjoyed during a visit to the Isles of Scilly and asked to rate them in terms of importance to them on a 1 to 3 scale where '1' was 'not important' and '3' was 'very important'. This then allowed an average importance score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

As the graphs below and table overleaf illustrate, the features and activities on the Islands which visitors considered of highest importance to them were walking and rest & relaxation scoring 2.69 and 2.67 out of 3.00 respectively. These were closely followed by island-hopping (2.62), beaches (2.53), local food & drink (2.47) and wildlife (2.40).

Those features/activities considered of lower importance amongst visitors were other sports (1.16), spa/wellbeing & activities for children (1.27 in each case), learning & self development (1.33), water sports (1.36), indoor options (1.43), events/festivals (1.62), shopping (1.72) and local arts and culture (1.95). There was little variation in the results year on year or by analysis segment.



Base 2,383 – 2,468



The features and activities on the Islands which visitors considered of least importance to them were water sports, other sports, events/festivals, indoor options, activities for children, spa/wellbeing and learning/self development.

Importance of features & activities	Not Important	Important	Very Important
Wildlife	6%	48%	46%
Local Plants/Gardens	7%	49%	44%
History/Heritage	10%	59%	32%
Beaches	6%	35%	59%
Walking	3%	25%	72%
Water sports	72%	20%	8%
Other Sports	87%	11%	2%
Eating Out	9%	50%	40%
Shopping	39%	50%	11%
Island Hopping	3%	32%	65%
Events/Festivals	48%	42%	10%
Rest & Relaxation	3%	28%	69%
Local Food & Drink	4%	45%	51%
Meeting Local People	16%	59%	25%
Indoor Options	62%	32%	5%
Activities for Children	81%	11%	8%
Local arts and culture	22%	61%	17%
Spa/wellbeing	78%	18%	4%
Learning/self development	71%	24%	4%

Base 2,383 – 2,468

Many respondents would like to see a cinema, swimming pool, more indoor activities and more things for children to do on the Islands.

For the first time during the 2017 survey respondents were asked what activities/experiences that currently cannot be enjoyed on Scilly that they would like to see or do and the main responses are summarised in the table and Word Cloud below. There was a wide and varied range of responses provided and the full list should be examined to gain a full understanding of this area.

Many mentioned the need for more indoor activities (15%), a cinema and swimming pool (9% each), art exhibitions / activities, (8%) and more evening entertainment (7%).

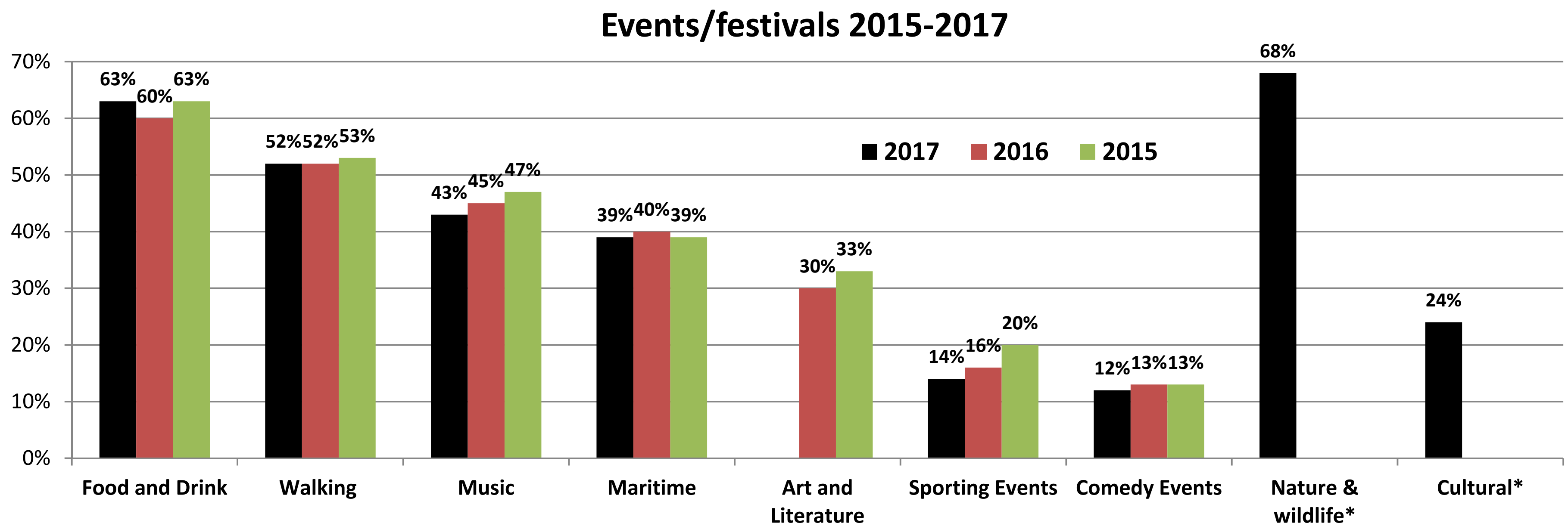
	Count	%
Indoor activities	61	**15%**
Cinema	44	**9%**
Swimming pool	44	**9%**
Art exhibitions / activities	40	**8%**
Evening entertainment	33	**7%**
Wet weather facilities	16	**3%**
Activities for children	16	**3%**
Guided tours / walks	13	**3%**

68% of visitors said nature & wildlife events would encourage them to visit with food & drink (63%), walking festivals (52%), music events (43%) and maritime festivals (39%) the next most popular. The least popular were comedy events (12%) and sporting events (14%).

Respondents were also asked what types of events would encourage them to visit the Isles of Scilly. 25% of all respondents said none of the types of events or festivals listed would encourage them to visit the islands and a further 6% listed an 'other' festival or event. Both of these sets of respondents have been removed from the results below to allow for comparisons with the previous survey years' data to be made.

Amongst those responding to the question 68% said nature & wildlife events/festivals would encourage them to visit (this was explored for the first time during 2017) with food & drink festivals (63%, 60% 2016), walking festivals (52%, the same proportion as during 2016), music events (43%, 45% 2016) and maritime festivals (39%, 40% 2016) the next most popular. The least popular were comedy events (12%, 13% 2016) and sporting events (14%, 16% 2016). Art & literature events were not explored during the 2017 research, instead respondents were asked about cultural events for the first time with 24% saying they would encourage them to visit. There was little variation in the results by segment.

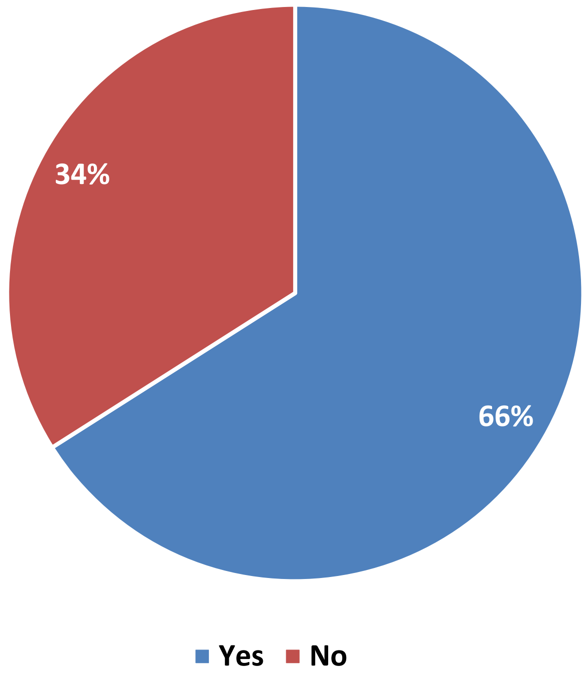
A number of respondents provided an 'other' type of event/festival which would encourage them to visit the Islands and these can be found in the appendices which accompany this report.



Base 2,474. *Explored for the first time during the 2017 survey.

Two thirds of respondents said they would consider taking a winter break on the Isles of Scilly.

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



Whether would consider a winter break on the Isles of Scilly (Nov-Mar)?	Yes	No
2017	**66%**	**34%**
2016	68%	32%
2015	69%	31%
2014	71%	29%

Base 2,488

66% of respondents said they would consider taking a winter break on the Isles of Scilly (68%, 69% and 71% during 2016, 2015 and 2014 respectively).

Whilst there was little variation in the results between the analysis segments, this proportion decreased to 54% of first time visitors to the Islands (57% 2016).

A number of respondents provided a comment about what would encourage them to visit during the winter period and these are summarised in the Word Cloud overleaf and in the appendix which accompanies this report.

Respondents were asked what would encourage them to visit the Islands during the winter (Nov-March). There was a wide and varied range of responses provided including the need for improved transport and improved weather.

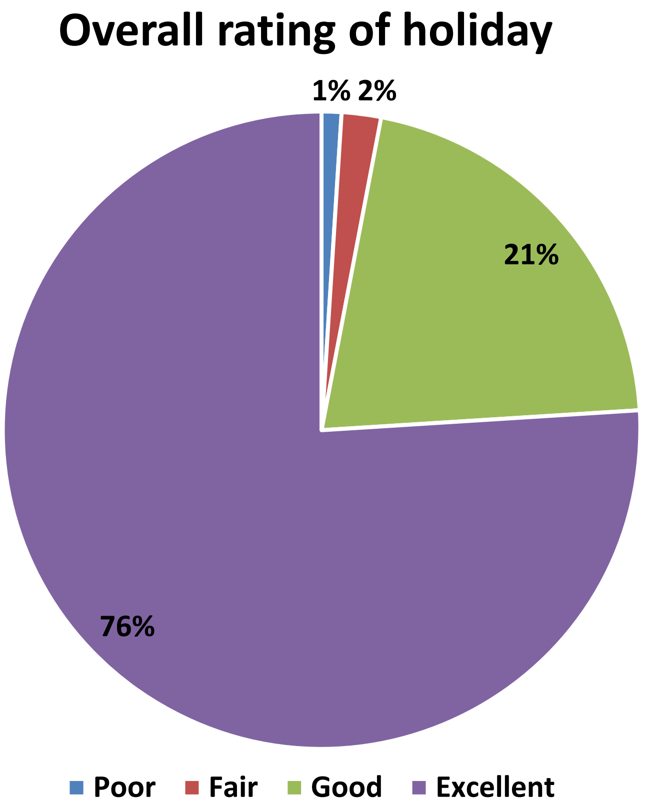
Respondents were asked what would encourage them to visit the Islands during the winter (Nov-March) and the main responses are summarised in the table and Word Cloud below. There was a wide and varied range of responses provided and the full list should be examined to gain a full understanding of this area.

Many mentioned the prices/affordability (18%), the cost/ease of transport to get to the Islands (14%), the weather (13%) and the need for a improved accommodation (10%).

	Count	%
Price / prices / affordability / special offers	268	**18%**
Cost / ease of transport	196	**14%**
Weather	187	**13%**
Improved accommodation	145	**10%**
Helicopter service	68	**5%**
Transport services	50	**4%**
Availability - accommodation, transport etc.	36	**3%**

76% of visitors rated their holiday as 'excellent' and a further 21% as 'good'.

The average mean score for their holiday overall was calculated at 3.73 out of 4.00.



Overall rating of holiday	Poor	Fair	Good	Excellent
2017	**1%**	**2%**	**21%**	**76%**
2016	-	1%	18%	80%
2015	1%	2%	20%	77%

Base 2,356

76% of visitors rated their holiday to the Islands as 'excellent' (80% 2016 and 77% 2015) and a further 21% as 'good' (18% 2016 and 20% 2015).

Only 3% of visitors rated their holiday as 'fair' (2%) or 'poor' (1%) compared with 1% rating it as 'fair' during 2016 and the same proportions as during 2015.

The average mean score for their holiday overall was calculated at 3.73 out of 4.00 (3.79 and 3.74 during 2016 and 2015 respectively).

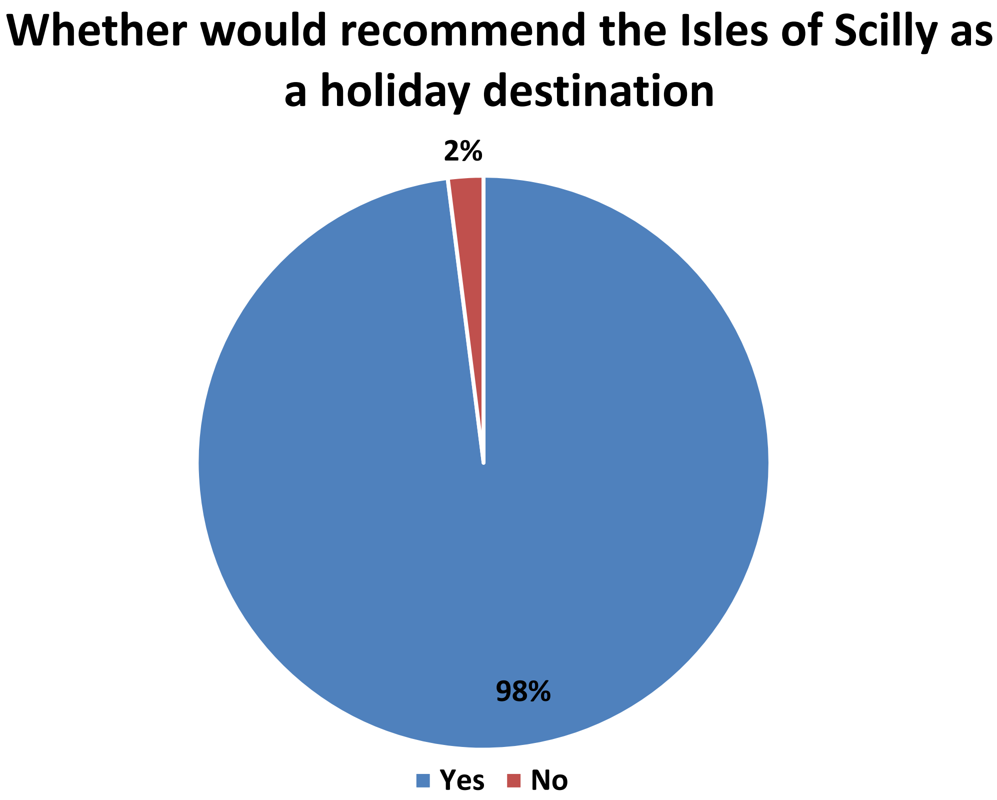
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf.

The overall rating of their holiday to the Islands was highest amongst staying visitors, January to March visitors, repeat visitors, those on their main holiday of the year, those staying on Bryher, those arriving by Skybus and those staying for 8+ days on the Islands.

Overall rating of holiday - mean satisfaction scores (out of a max. of 4.00)	
STAYING	3.74
DAY	3.46
JAN-MAR	3.76
APR-JUN	3.73
JUL-SEP	3.74
OCT-DEC	3.62
FIRST TIME	3.66
REPEAT	3.75
MAIN	3.78
SECOND	3.73
SHORT	3.62
ST MARY'S	3.74
ST AGNES	3.77
BRYHER	3.83
TRESCO	3.75
ST MARTIN'S	3.75
SKYBUS	3.75
SCILLONIAN	3.72
PRIVATE	3.69
CRUISE	3.52
OTHER TRANSPORT	3.71
2-4 DAYS	3.66
5-7 DAYS	3.74
8+ DAYS	3.80

Analysis segment ranking the individual factor the highest

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



Whether would recommend the Isles of Scilly as a holiday destination	Yes	No
2017	**98%**	**2%**
2016	99%	1%
2015	98%	2%

Base 2,352

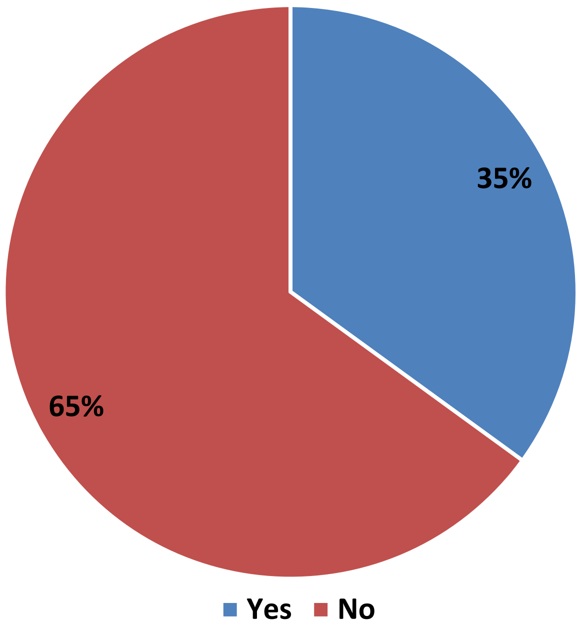
Respondents were asked whether they would recommend the Isles of Scilly as a holiday destination to their friends or family.

98% of respondents said they would do so compared with 99% and 98% during 2016 and 2015 respectively.

There was little variation in the results by analysis segment.

35% of visitors said they would make improvements to the Isles of Scilly as a holiday destination.

Whether would make any improvements to the Isles of Scilly as a holiday destination



For the first time during the 2017 survey respondents were asked whether they would make any improvements to the Isles of Scilly as a holiday destination.

35% of respondents said they would do so whilst 65% said it was fine as it is.

There was little variation in the results by analysis segment.

Base 2,158

Respondents were asked what, if anything, they thought the Isles of Scilly could do to improve upon the experience it offers visitors. Many mentioned the need for improved accommodation, better transport and information about visiting the Islands and that it was expensive.

Respondents were asked what, if anything, they thought the Isles of Scilly could do to improve upon the experience it offers visitors and the main responses are summarised in the table and Word Cloud below. There was a wide and varied range of responses provided and the full list should be examined to gain a full understanding of this area.

Many mentioned the need of the return of a helicopter service to and from the Islands, for better/improved transport services/links to the Islands, for better/improved accommodation, more/improved/better boat(s) and it being too expensive.

	Count	%
Return / bring back helicopter	111	**13%**
Better / improved transport services / links	85	**10%**
Better / improved accommodation	72	**8%**
More / improved / better boat/s	70	**8%**
Expensive	63	**7%**
Weather	41	**5%**
Restaurants	36	**4%**
Cheaper flights	39	**4%**
Better / improved Information	29	**3%**

Visitor Expenditure

Average visitor spend per person per day on the Islands (excluding accommodation) was £41.16. Staying visitors spent an average of £44.51 per person per night on their accommodation.

Average visitor spend per person per day on the Islands (excluding accommodation) was £41.16 (£41.51 in 2016, £49.30 in 2015 and £44.88 in 2014) ranging from £41.10 for staying visitors to £42.20 for those visiting the Islands for the day.

In addition, staying visitors spent an average of £44.51 per person per night on their accommodation on the Isles of Scilly (£41.34 in 2016, £46.11 in 2015 and £38.65 in 2014).

VISITOR SPEND BY CATEGORY 2017 (£/per person/per day)

	Accommodation (staying visitors only)	Meals/ snacks	Tourist shopping	Transport	Activities	Other	TOTAL	TOTAL (EXCLUDING ACCOMMODATION)
ALL 2017	**£44.51**	**£16.73**	**£8.87**	**£7.54**	**£5.53**	**£2.49**	**£85.67**	**£41.16**
STAYING	£44.51	£16.81	£8.71	£7.48	£5.59	£2.51	£85.61	£41.10
DAY	-	£15.11	£12.15	£8.94	£3.89	£2.11	£42.20	£42.20
ALL 2016	£41.34	£16.81	£8.73	£7.15	£5.76	£3.06	£82.85	£41.51
ALL 2015	£46.11	£18.59	£10.15	£9.36	£7.68	£3.52	£95.41	£49.30
ALL 2014	£38.65	£16.25	£8.30	£9.58	£7.27	£3.48	£83.53	£44.88

Isles of Scilly Visitor Survey 2017

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