Isles of Scilly
Visitor Survey 2018

Final report

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

May 2019

Contents

	Page
Summary	3-8
Introduction	9-12
Visitor Profile	13-23
Characteristics of Visits	24-41
Information Sourcing	42-54
The Travel Experience	55-72
Visitors' Opinions	73-107
Visitor Expenditure	108-109

Appendices

Summary

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Summary

- Almost all respondents were staying overnight on the Islands (94%).
- 67% of all visitors to the Islands were aged 45 years or over. Just 13% 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 2.72 people.
- 87% of groups contained adults only.
- 96% of visitors were UK residents. Approximately 8% lived within the TR (Truro) Postal code area and 7% in the PL (Plymouth) postal code area.
- 71% of visitors were on a repeat visit to the Islands. The average number of previous visits to the Islands was 11.80.
- A third of previous visitors had last visited the Islands up to 9 years ago including 22% in the last 5 years.
- 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.
- Accommodation was booked first by the large majority of visitors.
- 22% of all visits to the Islands took place in September.
- The peak months for visits of 2-4 days to the Islands were May (16%) and September (24%), compared with June and September for trips of 5-7 days (17% and 24% respectively) and June and August (20% and 23% respectively) for trips of 8+ days.
- 52% of visitors were visiting the Islands on their main holiday of the year.

Summary

- 55% of visitors were spending between 5 and 7 days on the Islands.

- The largest proportion of respondents arrived on the Islands on a Saturday (25%). 17% in each case arrived on a Friday or Monday. 27% of visitors who arrived on a Saturday said it was very important that they did so, as was it for 21% of respondents who arrived on a Friday.

- 52% of respondents were staying in self-catering accommodation on the Islands whilst a further 34% were staying in a hotel or B&B/guest house.

- 28% of respondents booked their accommodation online, 26% did so over the phone and 22% booked via email.

- 50% of respondents preferred to book online compared with the 28% of respondents who actually did so.

- Respondents rated the accommodation having an online availability calendar of highest importance to them (72% said this was ‘very important’ or ‘important’), followed by it having a good website (63% said this was ‘very important’ or ‘important’) and online booking (59% said this was ‘very important’ or ‘important’).

- 79% of respondents had stayed on St. Mary's.

- Other than the island where they had stayed, 82% of respondents had visited Tresco, 74% St. Mary’s, 69% St. Martin's, 67% St. Agnes and 61% Bryher.

- The scenery and/or peace and quiet (84% and 76% respectively) inspired the largest proportions of respondents to visit the Islands.

- The largest proportion of visitors (40%) had first heard about the Isles of Scilly from a previous visit and a 26% from a personal recommendation.

Summary

- The www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites had been used by 63% and 49% of respondents respectively when planning and booking their visit to the Isles of Scilly.

- 35% 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 (85%) used Facebook on a regular basis.

- 42% 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 3.06 and 3.39 out of a max. of 4.00.

- 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 provided but the key themes revolved around better information provision and frequency of boats.

- 47% of respondents had travelled to the Islands on the Scillonian and a further 44% via the Skybus.

- 71% of respondents had reached their connecting flight or boat to the Islands by car.

- The quality of the travel information, frequency of service, customer service and overall service all received good average scores of between 3.01 and 3.21 out of 4.00.

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

- Around a quarter of 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.

Summary

- 54% of respondents included a stop over in the South West as part of their visit to the Isles of Scilly. Of those staying over in the South West 88% stayed in Cornwall with 20% staying elsewhere in the region.

- 71% of those including an overnight stop stayed for one night before travelling on to the Isles of Scilly. 36% stayed for one night when returning from Scilly, 29% had a longer stay before going to Scilly and 22% had a longer stay upon returning from Scilly.

- On the whole, visitor satisfaction levels with their Island experience were very high. Satisfaction levels were again highest for the general atmosphere and sense of welcome and lowest for the range of shops and groceries.

- The areas for attention are the range of shops, all aspects of grocery provision, the range and value of transport on St. Mary's and the availability of public toilets.

- 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.

- 94% of respondents stated that there were not any specific activities that didn't live up to expectations in terms of quality or value for money.

- A cinema and swimming pool were the most cited activities that people would like to see.

- 43% of visitors said nature & wildlife events would encourage them to visit with food & drink (41%), walking festivals (33%), music events (27%), maritime festivals (25%) and cultural events (21%) the next most popular. The least popular were comedy events (7%) and sporting events (8%).

- 68% of respondents said they would consider taking a winter break on the Isles of Scilly. Cost and reliable/available transport are the main barriers to visiting at this time of the year.

- 79% of visitors rated their holiday to the Islands as 'excellent' and a further 19% as 'good. The average mean score for their holiday overall was calculated at 3.76 out of 4.00.

Summary

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

- 29% of visitors said they would make improvements to the Isles of Scilly as a holiday destination.

- 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 transport/facilities and reliability, lower prices and general costs associated with a visit and better accommodation.

- 61% of visitors said they would be willing to support a local Isles of Scilly environment fund.

- Average visitor spend per person per day on the Islands (excluding accommodation) was £43.62. Staying visitors spent an average of £45.64 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 2018 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 2,310 useable online submissions were received along with 27 self complete surveys resulting in a total survey sample of 2,337 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 (2,120) **(STAYING)**
- Day visitor (139) **(DAY)**

Time of year when visited:

- Jan-Mar (51) **(JAN-MAR)**
- Apr-Jun (898) **(APR-JUN)**
- Jul-Sept (1,219) **(JUL-SEPT)**
- Oct-Dec (106) **(OCT-DEC)**

Previous visits:

- First time visitor (665) **(FIRST TIME)**
- Repeat visitor (1,636) **(REPEAT)**

Length of stay:

- 2-4 days (292) **(2-4 DAYS)**
- 5-7 days (1,246) **(5-7 DAYS)**
- 8+ days (582) **(8+ DAYS)**

Type of trip:

- Main holiday (1,174) **(MAIN)**
- Second holiday (622) **(SECOND)**
- Short break (325) **(SHORT)**

Islands stayed on:

- St. Mary's (1,578) **(ST MARY'S)**
- St. Agnes (93) **(ST AGNES)**
- Bryher (203) **(BRYHER)**
- Tresco (213) **(TRESCO)**
- St. Martin's (185) **(ST MARTIN'S)**

How travelled to the Islands:

- Skybus (913) **(SKYBUS)**
- Scillonian III (992) **(SCILLONIAN)**
- Island Helicopters (59) **(HELICOPTER)**
- Private transport (31) **(PRIVATE)**
- Cruise ship (21) **(CRUISE)**
- Other transport (80) **(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 2018 survey only.

Visitor Profile

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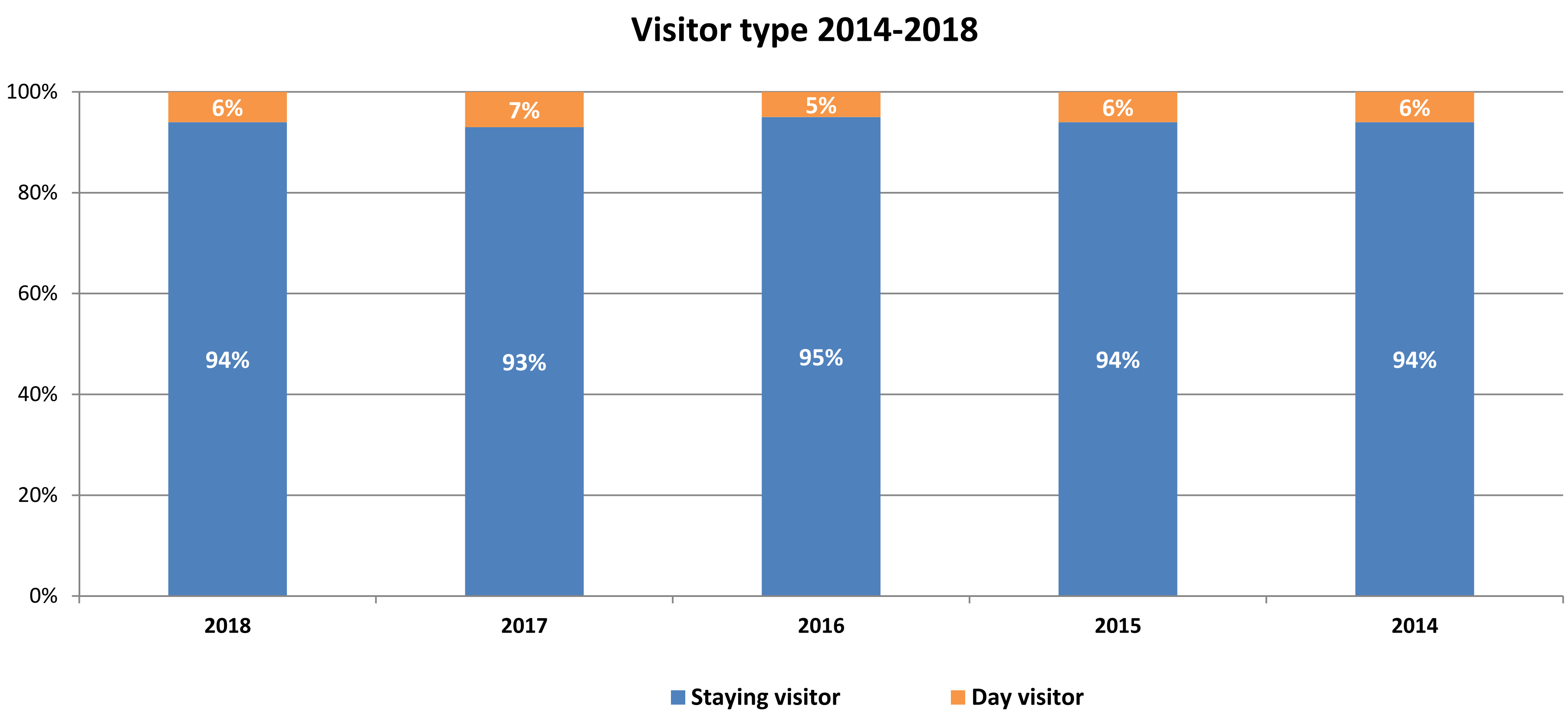
Almost all respondents were staying overnight on the Islands.

94% of respondents were staying overnight on the Isles of Scilly which is a similar proportion to previous years.

6% of respondents were on a day trip to the Islands with little change in this proportion compared with the 2014-2017 survey periods.

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

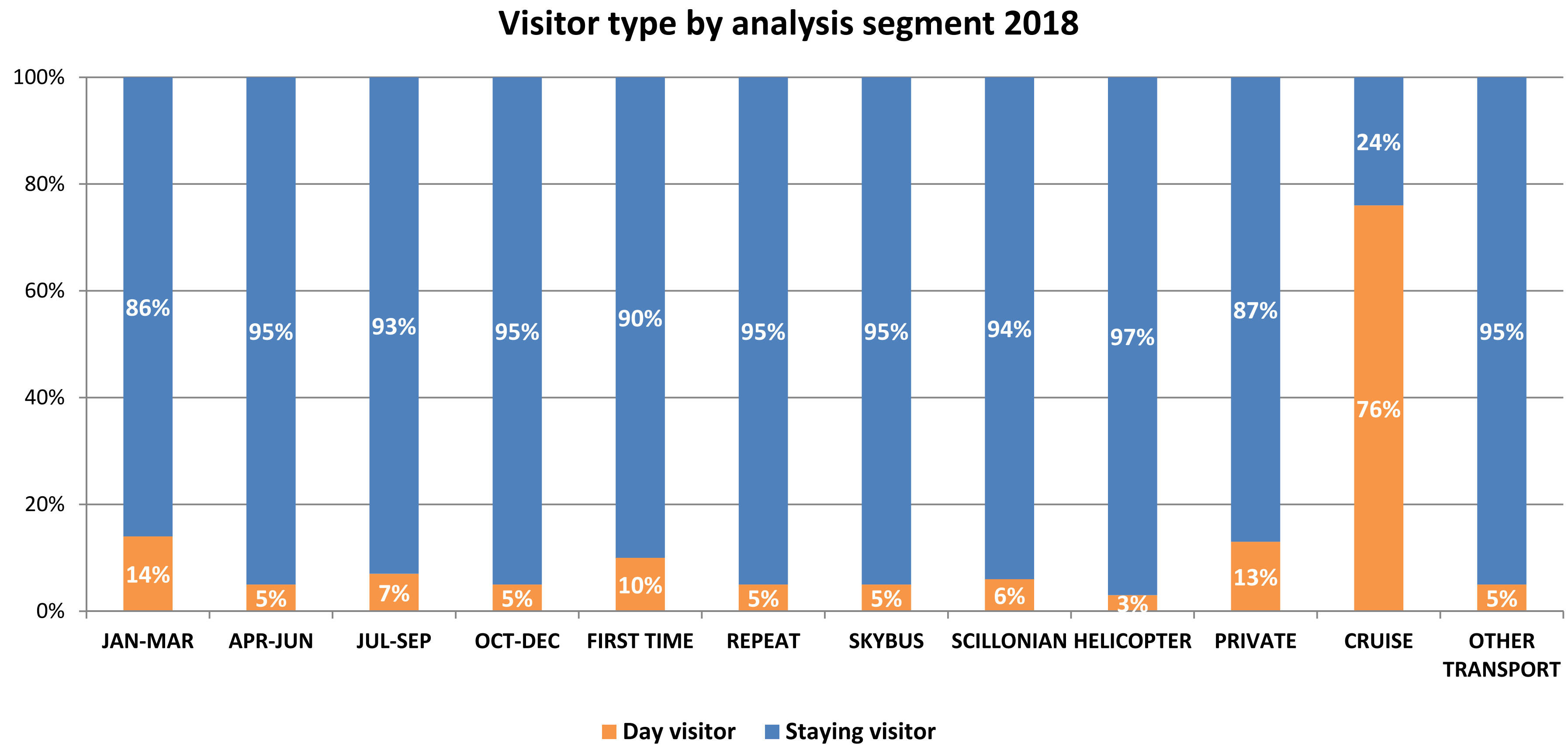


Base 2,259

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.

76% of respondents who had arrived in the Islands on a cruise ship, 14% who visited during January to March and 10% of first time visitors to the Islands were categorised as day visitors along with 6% 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.



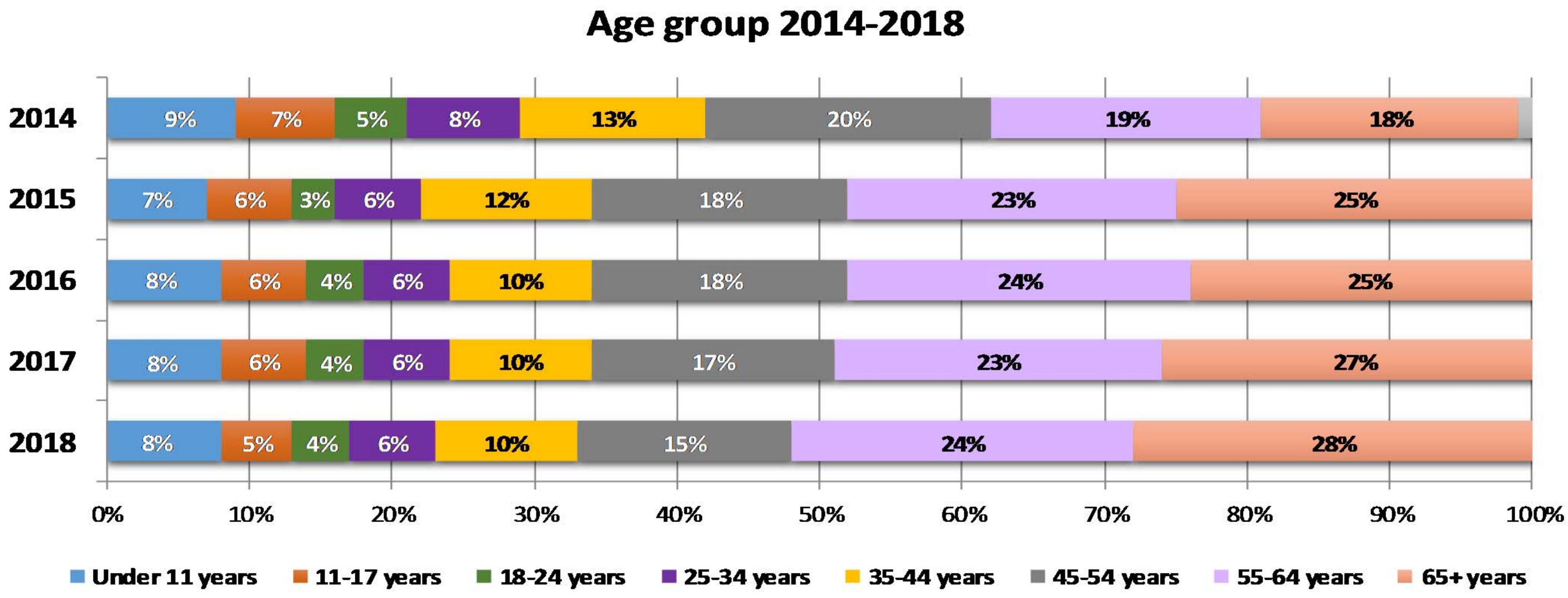
Base 2,259

67% of visitors were aged 45+. 87% of groups contained adults only.

67% of all visitors to the Islands were aged 45 years or over including 28% aged 65+ years, 24% aged 55-64 years and 15% aged 45-54 years. Just 13% of visitors were aged 17 or under whilst 10% were aged 18-34 and the same proportion were aged 35-44 years. These proportions remained very similar to the 2017 and 2016 surveys.

87% of groups contained adults only and 13% contained children aged 17 years or under which were similar proportions to 2017 (86% contained adults only and 14% contained children). The average group size was 2.72 people (2.77 - 2017, 2.78 - 2016 and 2.68 and 2.49 people during 2015 and 2014 respectively).

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



Base 2,258

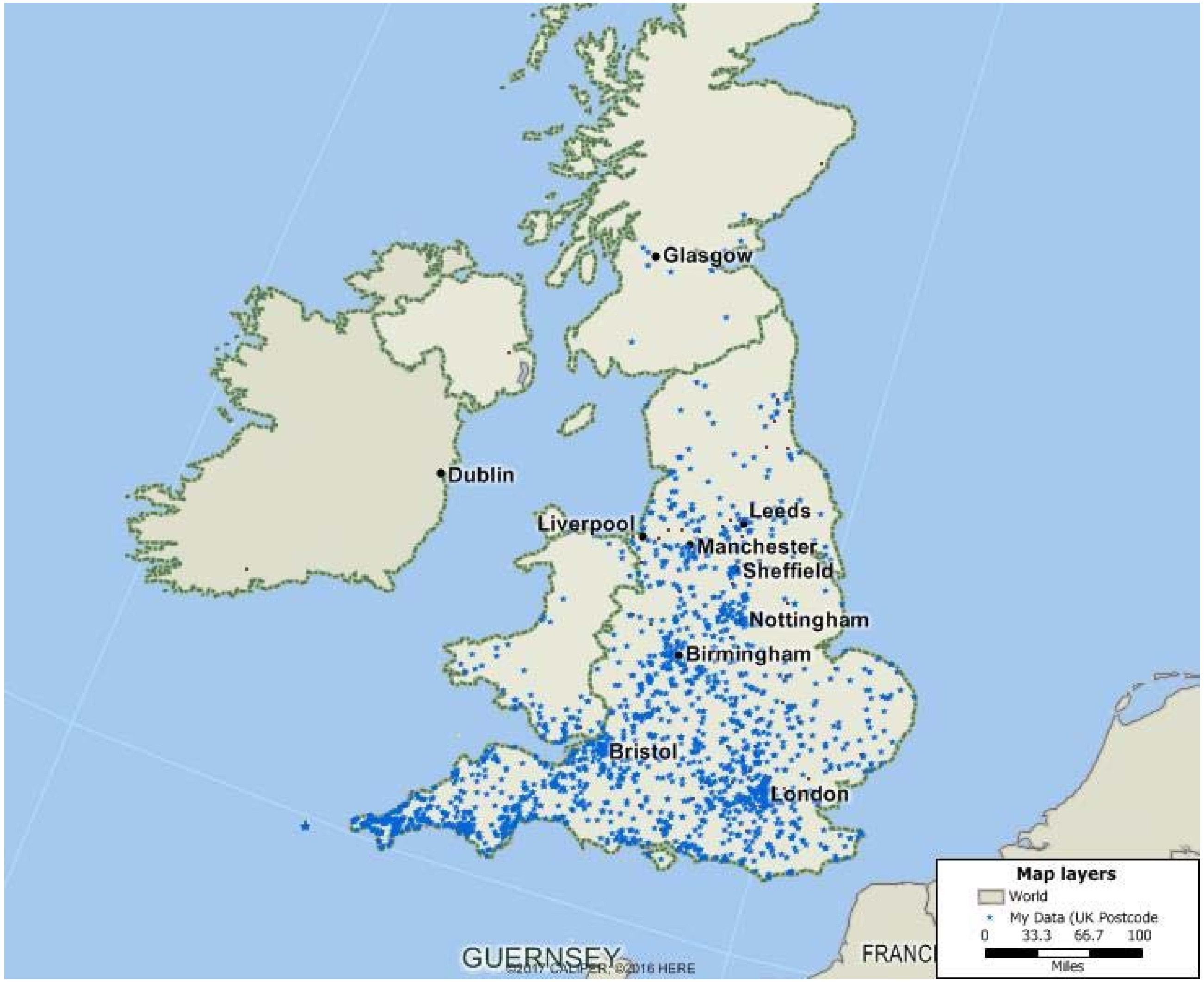
96% of visitors were UK residents.
8% lived within the TR (Truro) postal code area and 7% within the PL (Plymouth) postal code area.

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

96% of respondents were UK residents and 4% were from overseas, again very similar to 2017 (97% UK and 3% overseas).

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

8% of all UK respondents lived within the TR (Truro) postal code area and 7% in the PL (Plymouth) postal code area. 5% lived within the EX (Exeter) postal code area and 4% within the BS (Bristol) postal code area. The same proportion (4%) lived in a London postal code area.



Base 2,002

Postcode area– UK RESPONDENTS (96% OF SAMPLE)					
TRURO	8%	SWINDON	1%	STEVENAGE	1%
PLYMOUTH	7%	LEICESTER	1%	YORK	1%
EXETER	5%	WORCESTER	1%	DUDLEY	1%
LONDON	4%	CARDIFF	1%	CANTERBURY	1%
BRISTOL	4%	REDHILL	1%	NEWPORT	1%
GLOUCESTER	3%	HEMEL HEMPSTEAD	1%	ST ALBANS	1%
TAUNTON	3%	IPSWICH	1%	LEEDS	1%
TORQUAY	2%	MILTON KEYNES	1%	PRESTON	1%
BIRMINGHAM	2%	KINGSTON UPON THAMES	1%	CREWE	1%
GUILDFORD	2%	NORTHAMPTON	1%	CHESTER	1%
OXFORD	2%	PETERBOROUGH	1%	COLCHESTER	1%
BATH	2%	STOKE ON TRENT	1%	CROYDEN	1%
ROYAL TUNBRIDGE WELLS	2%	DORCHESTER	1%	MANCHESTER	1%
DERBY	2%	BRIGHTON	1%	OTHER POSTAL CODE AREAS COMBINED (each less than 1%)	7%
COVENTRY	2%	NORWICH	1%		
READING	2%	SWANSEA	1%		
NOTTINGHAM	2%	STOCKPORT	1%		
PORTSMOUTH	2%	CAMBRIDGE	1%		
BOURNEMOUTH	2%	SALISBURY	1%		
SOUTHAMPTON	2%	SHREWSBURY	1%		

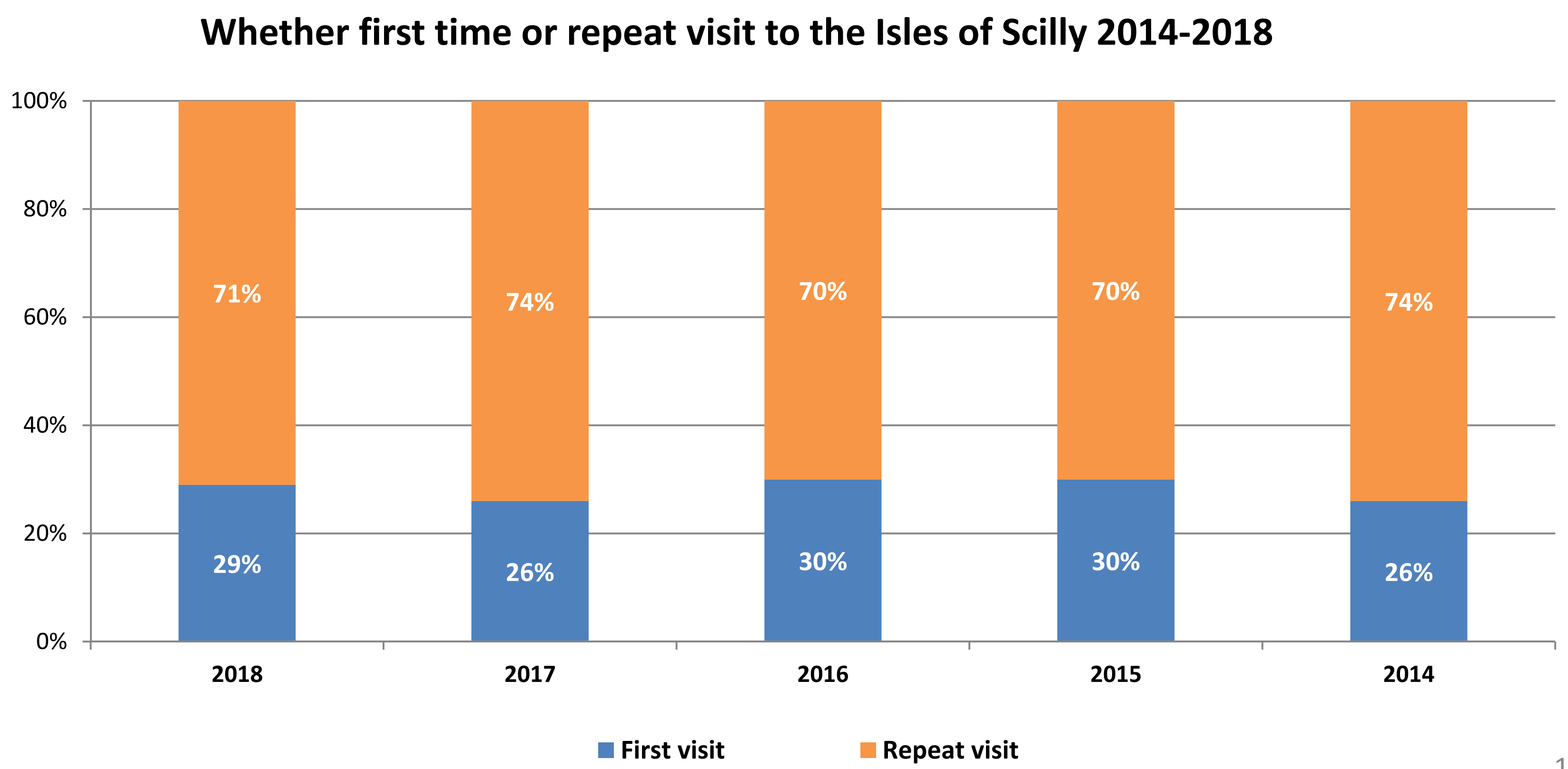
The proportion of repeat visitors to the Islands decreased slightly compared with 2017 but remained high at 71%.

The average number of previous visits to the Islands was 11.80.

The Islands continue to attract a large proportion of frequent visitors who have been visiting the Islands for many years (71%), although this proportion decreased slightly compared with 2017 (74%) returning to a similar level experienced during 2016 and 2015 (70% in each year).

The average number of previous visits to the Islands was 11.80 compared with 12.71 during 2017, 10.41 during 2016 and 11.5 during 2015.

The results by analysis segment are shown overleaf.



Base 2,301

Day visitors, those visiting during July to September, short break visitors, those staying on St. Mary's and Tresco, those arriving via a 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 (72%), those visiting during January to March (82%), those on their main holiday of the year (77%), those staying on Bryher (87%), those arriving by Skybus and Scillonian (72% each) and those staying for 8+ days (90%).

45% of day visitors, 31% of those visiting during July to September, 49% of those on a short break, 30% of those staying on St. Mary's and 31% of those staying on Tresco, 86% of those arriving via cruise ship and 44% 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 2018	First time visitor	Repeat visitor	Whether first time or previous visitor by analysis segment 2018	First time visitor	Repeat visitor
STAYING	28%	72%	**SKYBUS**	28%	72%
DAY	45%	55%	**SCILLONIAN**	28%	72%
JAN-MAR	18%	82%	**HELICOPTER**	25%	75%
APR-JUN	27%	73%	**PRIVATE**	39%	61%
JUL-SEP	31%	69%	**CRUISE**	86%	14%
OCT-DEC	27%	73%	**OTHER TRANSPORT**	29%	71%
MAIN	23%	77%	**2-4 DAYS**	44%	56%
SECOND	27%	73%	**5-7 DAYS**	33%	67%
SHORT	49%	51%	**8+ DAYS**	10%	90%
ST MARY'S	30%	70%			
ST AGNES	17%	83%			
BRYHER	13%	87%			
TRESCO	31%	69%			
ST MARTIN'S	27%	73%			

Base 2,301

Around two thirds of previous visitors (67%) had first visited the Islands 10 or more years ago including 31% who had first visited them 30+ years.

A third of previous visitors had first visited the Islands up to 9 years ago including 22% in the last 5 years. Please note this question was asked for the first time during the 2018 survey.

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

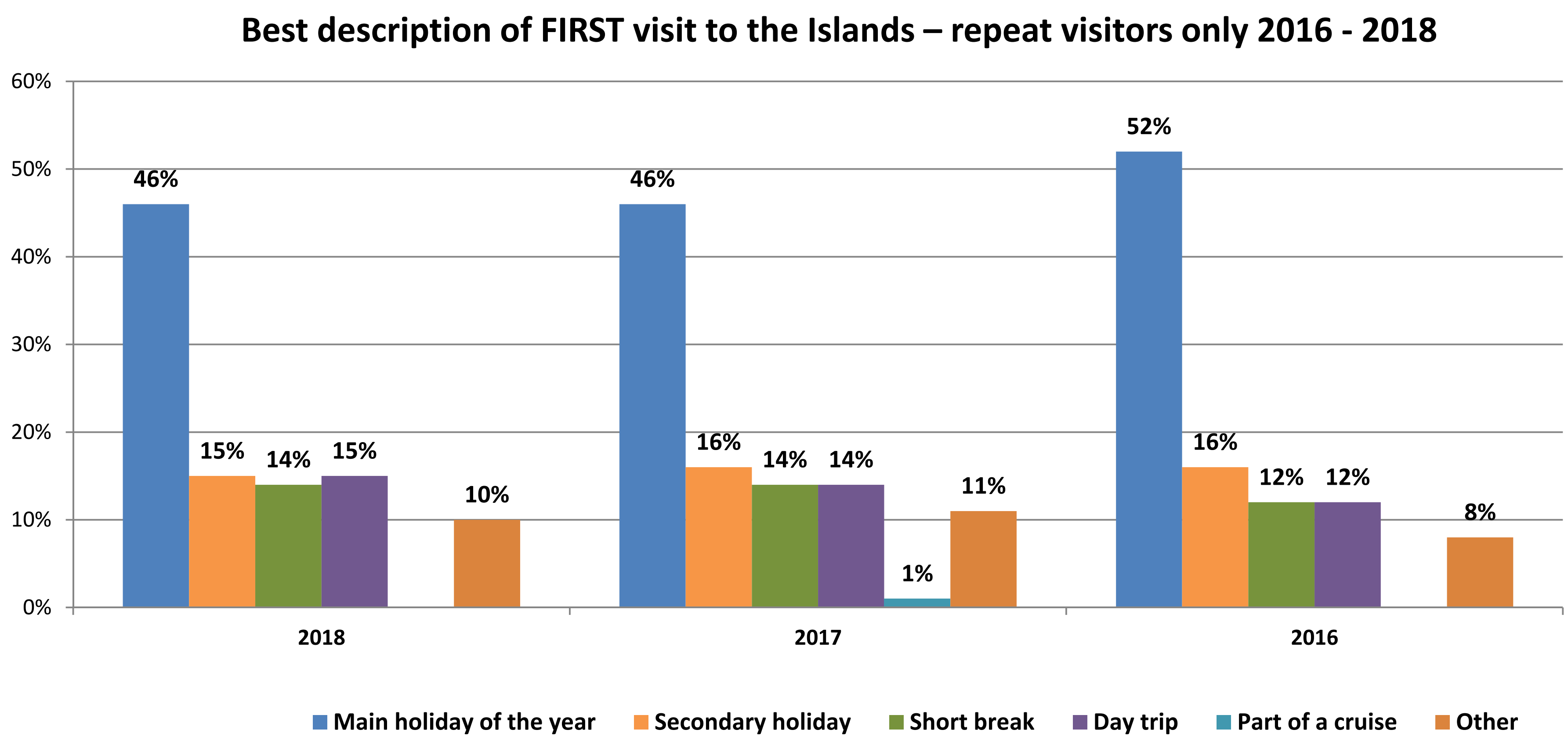
How long ago was first visit to the Islands by analysis segment 2018	In the last 5 years	5-9 years ago	10-19 years ago	20-29 years ago	30+ years ago
ALL	**22%**	**11%**	**21%**	**15%**	**31%**
STAYING	22%	11%	21%	15%	30%
DAY	25%	9%	17%	17%	32%
JAN-MAR	17%	10%	24%	24%	24%
APR-JUN	23%	13%	18%	15%	30%
JUL-SEP	22%	10%	22%	15%	32%
OCT-DEC	21%	9%	27%	15%	28%
MAIN	22%	11%	20%	17%	31%
SECOND	20%	11%	24%	14%	31%
SHORT	27%	10%	20%	15%	27%
ST MARY'S	23%	11%	21%	15%	30%
ST AGNES	16%	14%	20%	14%	36%
BRYHER	20%	12%	25%	19%	25%
TRESCO	21%	8%	23%	17%	31%
ST MARTIN'S	21%	11%	14%	14%	40%
SKYBUS	21%	12%	23%	15%	30%
SCILLONIAN	24%	10%	19%	16%	31%
HELICOPTER	9%	20%	23%	23%	25%
PRIVATE	37%	16%	26%	11%	11%
CRUISE	-	-	33%	-	67%
OTHER TRANSPORT	19%	4%	26%	5%	46%
2-4 DAYS	25%	9%	23%	17%	26%
5-7 DAYS	25%	13%	22%	14%	25%
8+ DAYS	15%	9%	19%	17%	40%

Base 1,614

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.

When asked to best describe their FIRST ever visit to the Isles of Scilly, as was the case during 2017, 46% of respondents said they had visited on their main holiday of the year and compared with 52% during 2016.

15% of respondents had first visited the Islands on a secondary holiday, 14% on a short break and 15% as part of a day trip. There was little change in these results compared with the 2016 and 2017 surveys or by analysis segment.



Base 1,619

Accommodation was booked first by the large majority of visitors.

For the first time during 2018 respondents were asked which they booked first, their travel or accommodation.

79% of respondents had booked their accommodation first, 11% booked their travel first and 10% had booked their travel and accommodation as part of a package.

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

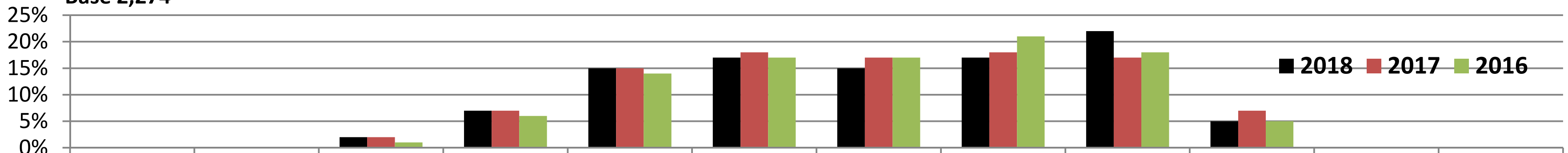
Base 2,011

Characteristics of Visits

22% of all visits to the Islands took place in September.

17% of respondents visited the Islands during June, 15% in July, 17% in August and 22% in September. 2018 has seen an increase in visits during September alongside a slight decrease in July and August visits compared with 2016 and 2017. There was little variation in the results by each of the analysis segments.

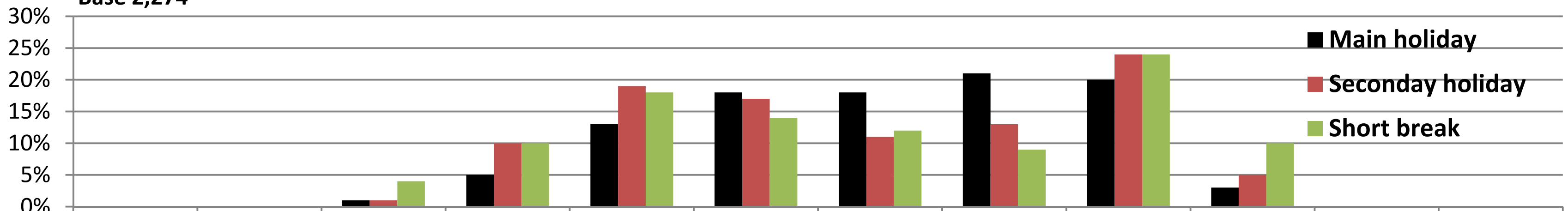
Month of visit 2016 - 2018



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018			2%	7%	15%	17%	15%	17%	22%	5%		
2017			2%	7%	15%	18%	17%	18%	17%	7%		
2016			1%	6%	14%	17%	17%	21%	18%	5%		

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 June, July and August (18% in both June and July and 21% in August). In contrast, during May and September a higher proportion of those visitors on their second holiday or a short break had visited the Islands (19% on a second holiday and 18% on a short break during May and 24% in each case during September).

Month of visit by type of trip 2018



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Main holiday			1%	5%	13%	18%	18%	21%	20%	3%		
Seconday holiday			1%	10%	19%	17%	11%	13%	24%	5%		
Short break			4%	10%	18%	14%	12%	9%	24%	10%		

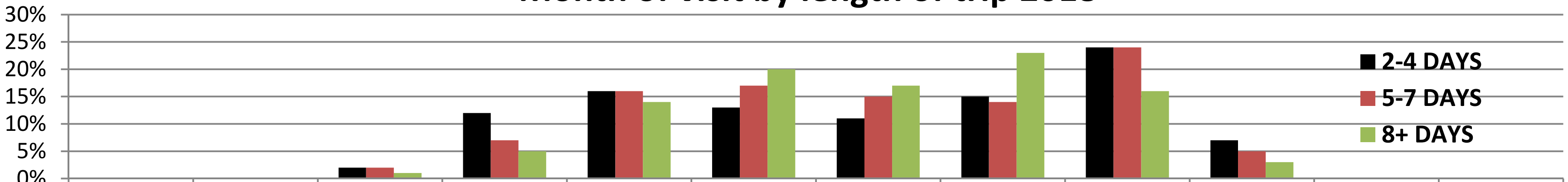
There was little variation in the results compared with 2016 or 2017 (see table overleaf) or by each of the analysis segments.

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

The peak months for visits of 2-4 days to the Islands were May (16%) and September (24%), compared with June and September for trips of 5-7 days (17% and 24% respectively) and June and August (20% and 23% respectively) for trips of 8+ days.

Base 2,274

Month of visit by length of trip 2018



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2-4 DAYS			2%	12%	16%	13%	11%	15%	24%	7%		
5-7 DAYS			2%	7%	16%	17%	15%	14%	24%	5%		
8+ DAYS			1%	5%	14%	20%	17%	23%	16%	3%		

Month of visit by year and type of trip 2016-2018

Year	Type of trip	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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%	-	-
2018	Main holiday	-	-	1%	5%	13%	18%	18%	21%	20%	3%	-	-
	Secondary holiday	-	-	1%	10%	19%	17%	11%	13%	24%	5%	-	-
	Short break	-	-	4%	10%	18%	14%	12%	9%	24%	10%	-	-

Base 2,274 (2018)

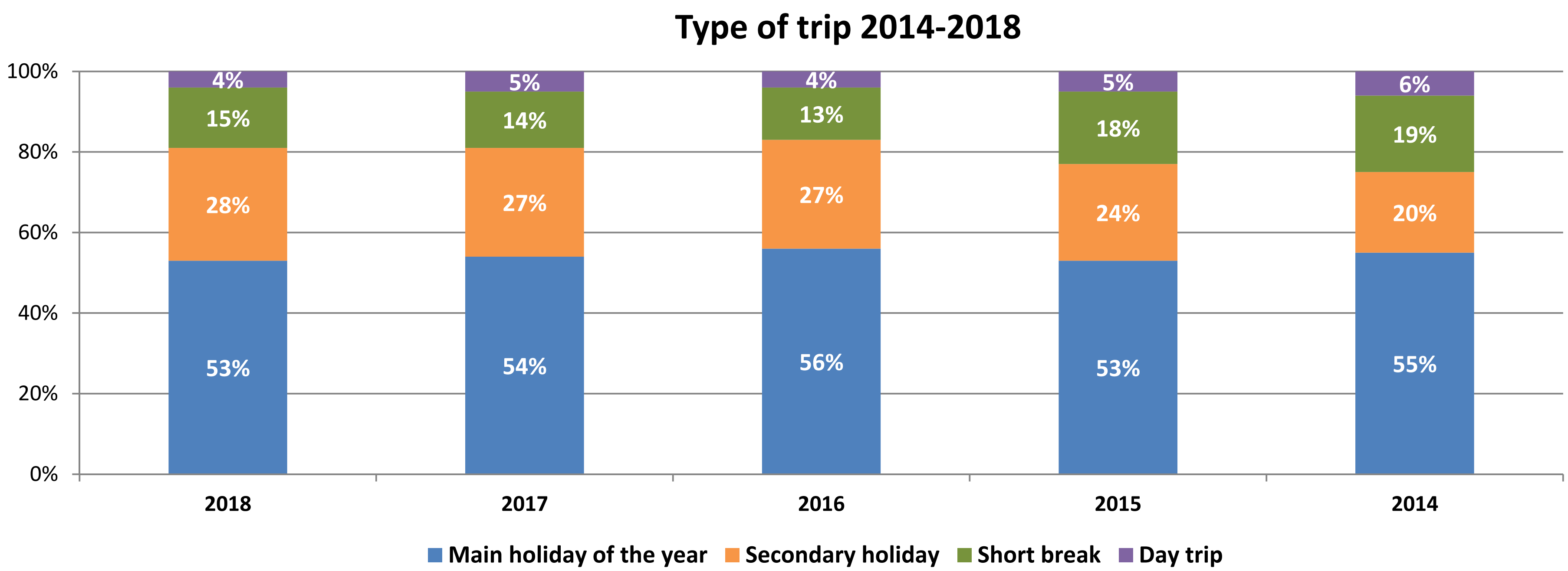
52% of visitors were visiting the Islands on their main holiday of the year.

As was the case in previous years, the majority of respondents (53%) were visiting on their main holiday of the year (54%, 56%, 53% and 55% during 2017, 2016, 2015 and 2014 respectively).

28% of respondents were on a secondary holiday to the Isles of Scilly, compared with 27% in each case doing so during 2017 and 2016 and compared with 24% during 2015 and 20% during 2014. 15% of respondents were on a short break, a similar proportion to 2017 and 2016 (14% and 13% respectively) and compared with 18% and 19% during 2015 and 2014 respectively.

At 4%, the proportion of visitors on a day trip to the Islands remained similar to previous years (2017 5%, 2016 4%, 2015 5% and 2014 6%).

The results by analysis segment are provided overleaf.



Base 2,218

Those visiting during 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 (58%), those on a repeat visit to the Islands (58%), those staying on St. Agnes (68%), those arriving on the Scillonian (57%) and those staying for 8+ days (81%).

In terms of those most likely to be on a secondary holiday to the Isles of Scilly, these included 33% of respondents visiting during the months of April to June, 29% of those on a repeat visit, 38% of those staying on Tresco, 35% of those arriving on other transport and 36% of those staying for between 5 and 7 days.

Short breaks were most popular amongst those visiting during October to December (33%), first time visitors (25%), those staying on Tresco (20%), those arriving on private transport (35%) and those staying for 2-4 days (58%).

6% of those visiting during January to March, 8% of first time visitors to the Islands and 67% of those arriving via a cruise ship were on a day trip to the Islands.

Type of trip by analysis segment 2018	Main holiday	Secondary holiday	Short break	Day trip	Type of trip by analysis segment 2018	Main holiday	Secondary holiday	Short break	Day trip
JAN-MAR	47%	21%	26%	6%	**SKYBUS**	51%	30%	16%	3%
APR-JUN	48%	33%	16%	4%	**SCILLONIAN**	57%	26%	12%	5%
JUL-SEP	58%	25%	12%	5%	**HELICOPTER**	51%	29%	17%	3%
OCT-DEC	35%	30%	33%	2%	**PRIVATE**	26%	32%	35%	6%
FIRST TIME	41%	26%	25%	8%	**CRUISE**	19%	5%	10%	67%
REPEAT	58%	29%	11%	3%	**OTHER TRANSPORT**	50%	35%	14%	1%
ST MARY'S	56%	29%	15%	-	**2-4 DAYS**	21%	21%	58%	-
ST AGNES	68%	22%	11%	-	**5-7 DAYS**	52%	36%	12%	-
BRYHER	62%	27%	12%	-	**8+ DAYS**	81%	18%	1%	-
TRESCO	43%	38%	20%	-					
ST MARTIN'S	63%	24%	13%	-					

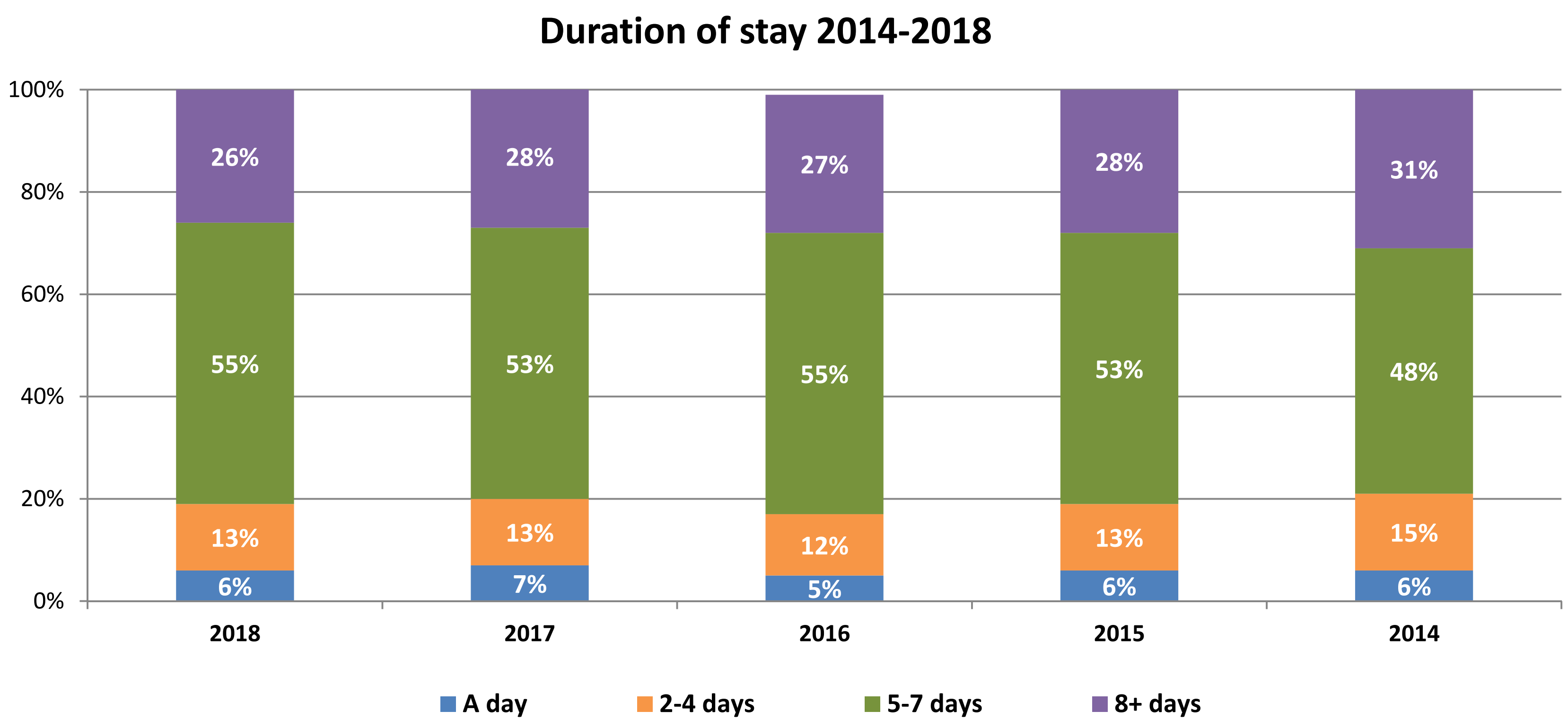
Base 2,218

55% of visitors were spending between 5 and 7 days on the Islands.

The largest proportion of respondents (55%) were spending between 5 and 7 days on the Islands, a similar proportion to previous years except for 2014 (48%).

Around a quarter of respondents (26%) were spending 8+ days on the Islands, again similar to the 2015-2017 periods but compared with 31% in 2014. 13% were spending 2-4 days (a similar proportion of previous years) and just 6% were visiting for just the one day, again, a similar proportion to previous years.

The results by analysis segment are provided overleaf.



Base 2,259

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

27% of visitors to the Islands during July to September, 33% of repeat visitors, 39% who were on their main holiday of the year, 55% of those staying on St. Agnes and 33% of respondents arriving by other transport were spending a longer period on the Islands of 8 days or more.

19% of visitors to the Islands during October to December, 20% of first time visitors, 50% who were on a short break, 17% of those staying on Tresco, and 29% of respondents arriving by private transport were spending 2-4 days on the Islands.

Duration of stay by analysis segment 2018	A day	2-4 days	5-7 days	8+ days	Duration of stay by analysis segment 2018	A day	2-4 days	5-7 days	8+ days
JAN-MAR	14%	16%	48%	22%	**ST MARY'S**	2%	13%	59%	26%
APR-JUN	5%	14%	56%	25%	**ST AGNES**	2%	11%	32%	55%
JUL-SEP	7%	12%	54%	27%	**BRYHER**	2%	9%	53%	36%
OCT-DEC	5%	19%	58%	17%	**TRESCO**	2%	17%	53%	28%
FIRST TIME	10%	20%	62%	9%	**ST MARTIN'S**	2%	10%	45%	43%
REPEAT	5%	10%	52%	33%	**SKYBUS**	5%	12%	58%	26%
MAIN	2%	5%	54%	39%	**SCILLONIAN**	6%	13%	56%	26%
SECOND	2%	10%	72%	17%	**HELICOPTER**	3%	17%	54%	25%
SHORT	3%	50%	45%	2%	**PRIVATE**	13%	29%	35%	23%
					CRUISE	76%	5%	19%	-
Base 2,259					**OTHER TRANSPORT**	5%	13%	50%	33%

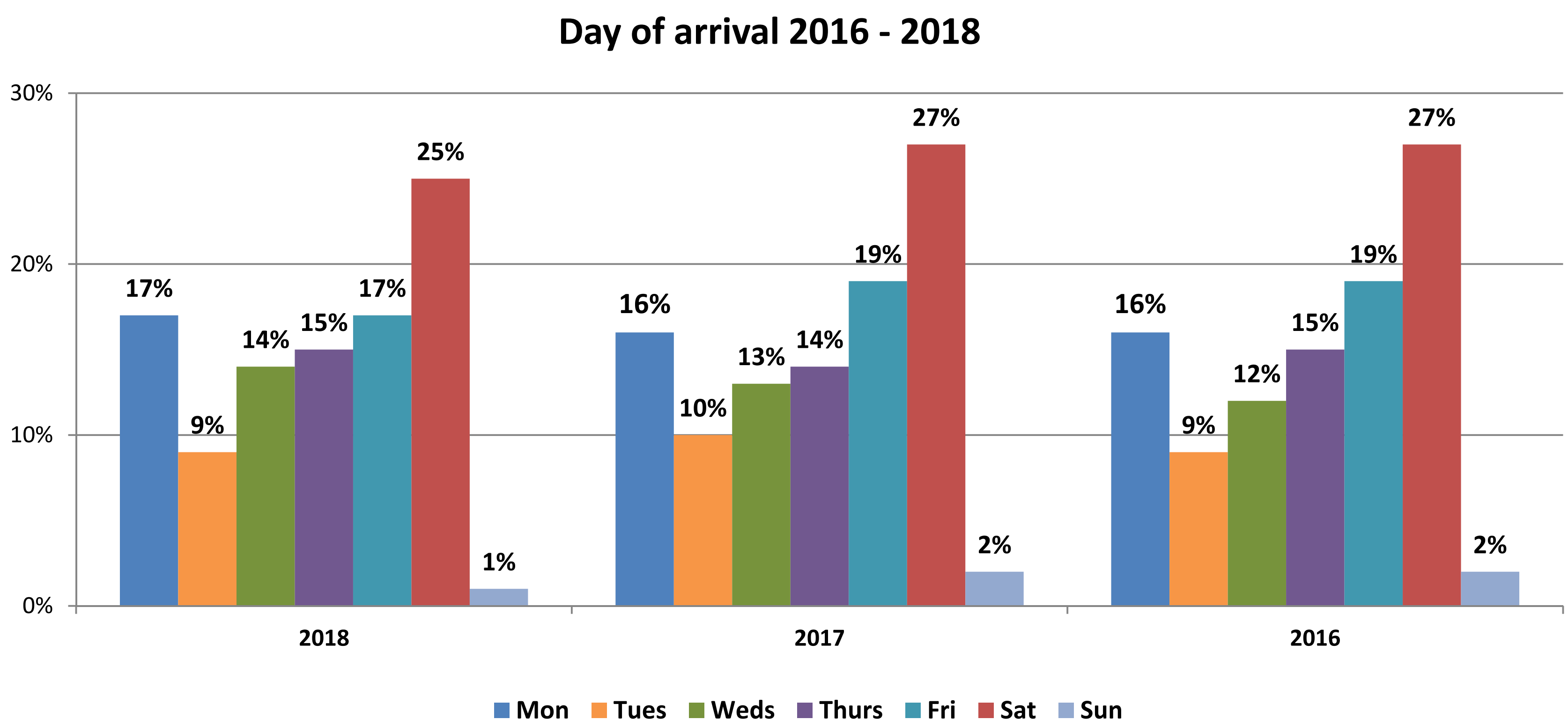
As was the case during 2016 and 2017, the largest proportion of respondents arrived on the Islands on a Saturday (25%). 17% in each case arrived on a Friday or Monday.

The largest proportion of respondents arrived on the Islands on a Saturday (25%) as was also the case during 2016 and 2017 (27% each).

17% arrived on a Friday (19% each during 2016 and 2017) and the same proportion arrived on a Monday (16% each during 2016 and 2017).

15% of respondents arrived on a Thursday, 14% on a Wednesday and 9% on a Tuesday. Just 1% arrived on a Sunday.

There was little change in the results year on year. The results by analysis segment are provided overleaf.



Base 2,008

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

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

The only exceptions were those visiting during January to March and October to December, those on a short break, those staying on Tresco, those who arrived on an island helicopter, those arriving on private transport or on a cruise ship and those who stayed for 2-4 days - the largest proportion of whom in each case had arrived on a Monday or a Friday (except those arriving on a cruise ship – the largest proportion of whom arrived on a Wednesday).

Day of arrival by analysis segment 2018	Mon	Tues	Weds	Thurs	Fri	Sat	Sun	Type of trip by analysis segment 2018	Mon	Tues	Weds	Thurs	Fri	Sat	Sun
JAN-MAR	20%	2%	11%	11%	32%	23%	-	**TRESCO**	21%	14%	17%	14%	17%	16%	2%
APR-JUN	18%	10%	13%	15%	19%	24%	-	**ST MARTIN'S**	12%	10%	17%	10%	22%	25%	4%
JUL-SEP	16%	9%	14%	16%	15%	27%	2%	**SKYBUS**	19%	12%	14%	16%	19%	20%	0%
OCT-DEC	23%	8%	20%	10%	17%	22%	1%	**SCILLONIAN**	16%	7%	14%	15%	17%	30%	2%
FIRST TIME	23%	10%	11%	15%	17%	23%	2%	**HELICOPTER**	30%	-	16%	12%	18%	23%	2%
REPEAT	15%	9%	15%	16%	17%	27%	1%	**PRIVATE**	28%	7%	14%	17%	14%	14%	7%
MAIN	16%	9%	15%	15%	18%	26%	1%	**CRUISE**	-	14%	43%	29%	-	14%	-
SECOND	17%	8%	13%	16%	16%	29%	1%	**OTHER TRANSPORT**	8%	9%	20%	14%	10%	34%	5%
SHORT	24%	13%	13%	17%	18%	15%	1%	**2-4 DAYS**	27%	13%	14%	12%	19%	13%	1%
ST MARY'S	17%	9%	14%	17%	17%	25%	1%	**5-7 DAYS**	17%	8%	13%	16%	16%	29%	1%
ST AGNES	20%	10%	8%	19%	15%	27%	1%	**8+ DAYS**	14%	10%	15%	16%	19%	24%	1%
BRYHER	15%	6%	16%	8%	24%	28%	2%								

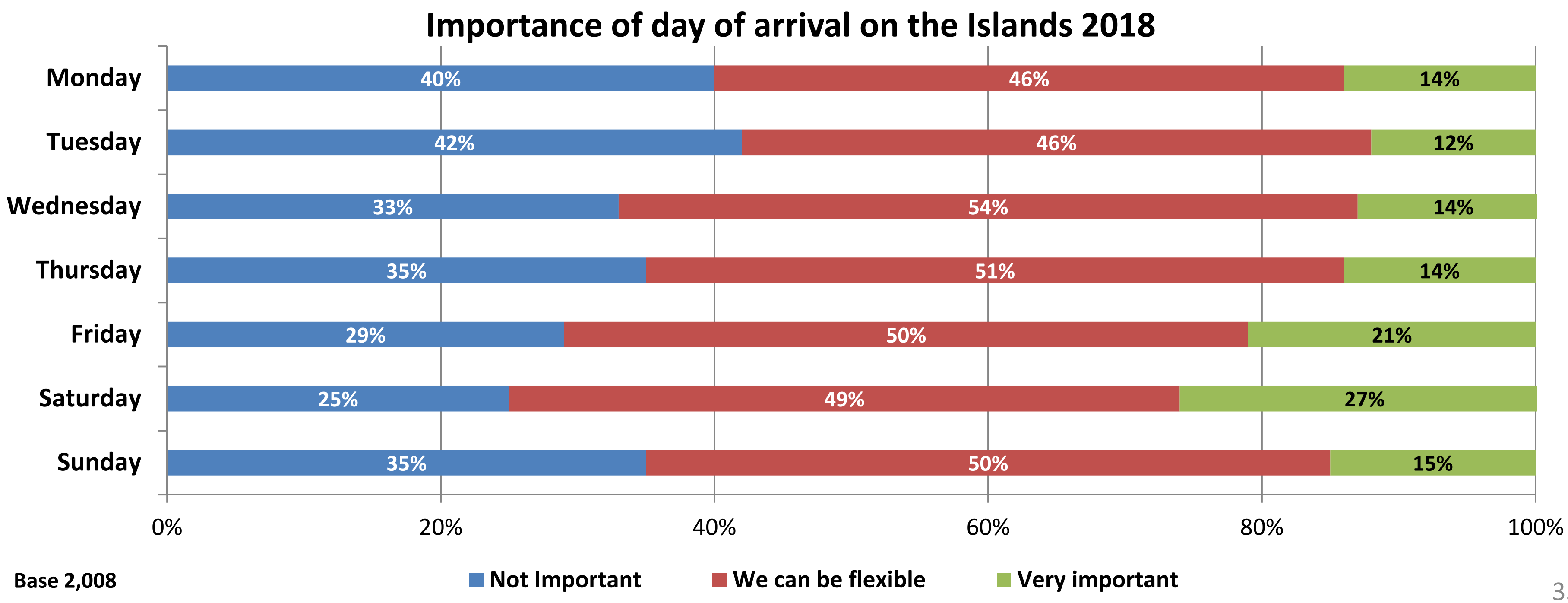
27% of visitors said it was very important that they arrived on the Islands on a Saturday, whilst 21% said the same about a Friday.

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, as was it for 21% of respondents who arrived on a Friday. There was little or no change in the results compared with 2017.

The largest proportion of respondents in each case (46% - 50%) said they could be flexible about which day they arrived. 42% of visitors arriving on a Tuesday and 40% arriving on a Monday said it was not important to them which day of the week they arrived, along with 35% arriving on a Thursday or a Sunday and 33% arriving on a Wednesday.

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



Base 2,008

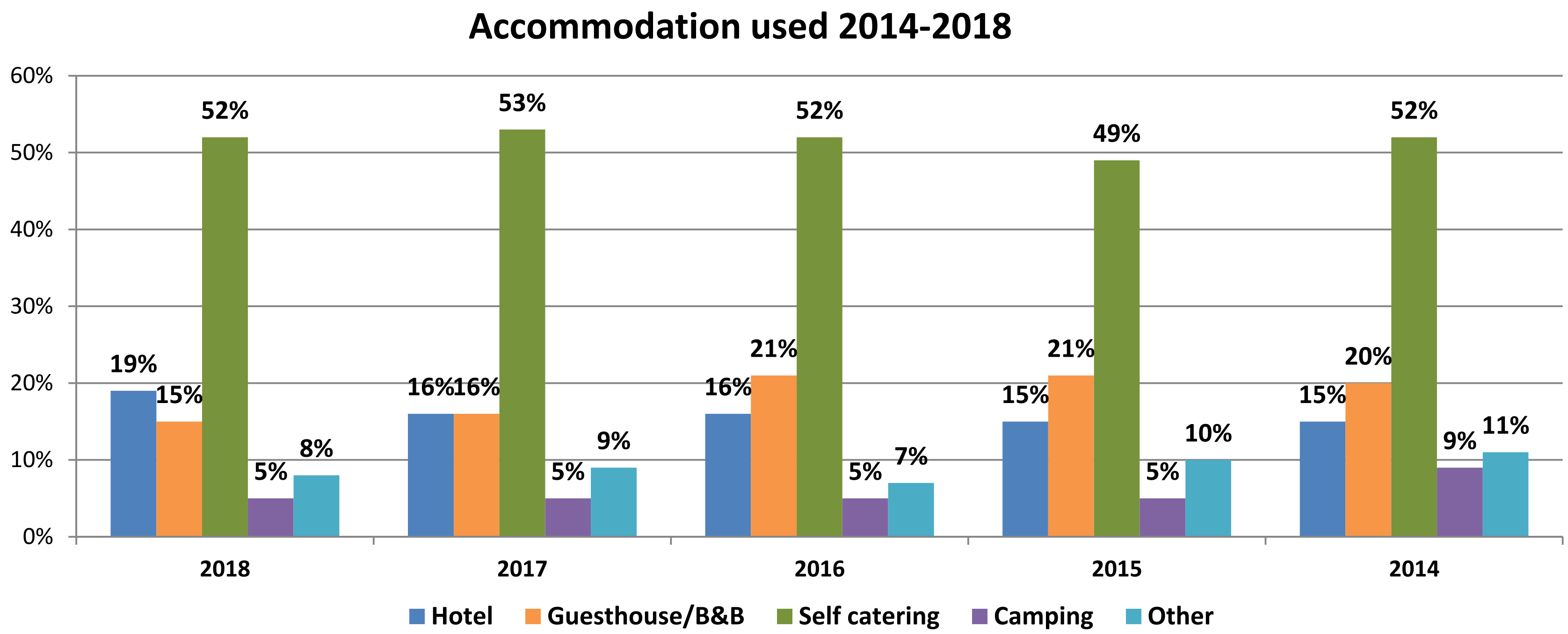
52% of respondents were staying in self-catering accommodation on the Islands whilst a further 34% were staying in a hotel or B&B/guest house.

52% of respondents were staying in self-catering accommodation on the Islands which is a similar proportion to previous years except for 2015 (49%). 34% were staying in a hotel or B&B/guest house (19% and 15% respectively) which is comparable with previous years.

Just 5% of respondents were camping during their visit which is a similar proportion to previous years except for 2014 (9%).

9% had used other types of accommodation including staying with friends/family (2%) 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 2,010 Please note that multiple responses were provided for this question 2014-2017.

43% of visitors during October to December, 51% of first time visitors, 65% of those on a short break, 39% staying on St. Martin's, 53% arriving by island helicopter and 71% staying for 2-4 days used serviced accommodation on the Islands.

With the exception of first time visitors to the Islands, those on a short break, those arriving by island helicopter or on a cruise ship and those staying 2-4 days (the largest proportion of whom were staying in serviced accommodation), the largest proportion of respondents amongst all the other analysis segments were using self catering accommodation.

20% of visitors staying on St. Agnes, 16% on Bryher and 10% on St. Martin's were camping.

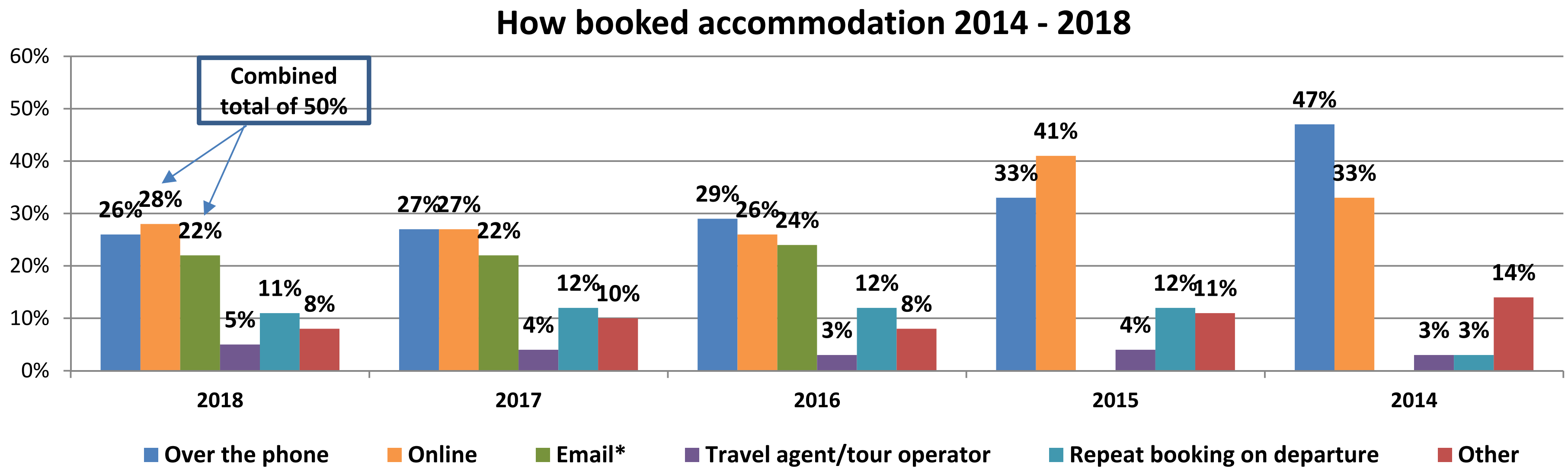
Accommodation used by analysis segment 2018	Hotel	Guesthouse /B&B	Self catering	Camping	Other	Accommodation used by analysis segment 2018	Hotel	Guesthouse /B&B	Self catering	Camping	Other
JAN-MAR	36%	2%	50%		11%	**SKYBUS**	25%	14%	52%	1%	8%
APR-JUN	20%	16%	51%	4%	8%	**SCILLONIAN**	14%	16%	55%	10%	6%
JUL-SEP	18%	15%	53%	6%	8%	**HELICOPTER**	23%	30%	39%	4%	5%
OCT-DEC	30%	13%	45%	1%	11%	**PRIVATE**	3%	10%	14%	-	72%
FIRST TIME	28%	23%	37%	3%	9%	**CRUISE**	29%	14%	-	-	57
REPEAT	16%	12%	58%	6%	7%	**OTHER TRANSPORT**	22%	11%	53%	1%	13%
MAIN	14%	15%	59%	7%	6%	**2-4 DAYS**	45%	26%	14%	5%	10%
SECOND	19%	11%	58%	3%	8%	**5-7 DAYS**	19%	15%	56%	4%	6%
SHORT	41%	24%	16%	4%	15%	**8+ DAYS**	8%	11%	62%	9%	11%
ST MARY'S	19%	18%	53%	3%	7%						
ST AGNES	6%	14%	38%	20%	21%						
BRYHER	28%	6%	39%	16%	10%						
TRESCO	18%	5%	52%	-	26%						
ST MARTIN'S	32%	7%	41%	10%	10%						

Base 2,010

28% of respondents booked their accommodation online, 26% did so over the phone and 22% booked via email.

28% of respondents booked their accommodation online (27% during 2017, 26% during 2016, 41% during 2015 and 33% during 2014) whilst 26% booked over the phone (27%, 29%, 33% and 47% during 2017, 2016, 2015 and 2014 respectively). 22% booked via email (the same proportion as during 2017 and compared with 24% during 2016). Please note 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 50% of respondents (28% online and 22% via email) doing so during the 2018 survey and the combined 49% and 50% of respondents for whom this was the case during the 2017 and 2016 surveys respectively.

11% of respondents booked during their last visit (12% in each case during the 2015 - 2017 surveys and compared with 3% during 2014) and 5% booked through a travel agent or tour operator (a similar proportion to previous years). 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 (8%) please see the appendices which accompany this report.



Base 2,009 * Via 'Email' option not specified during the 2015 & 2014 surveys.

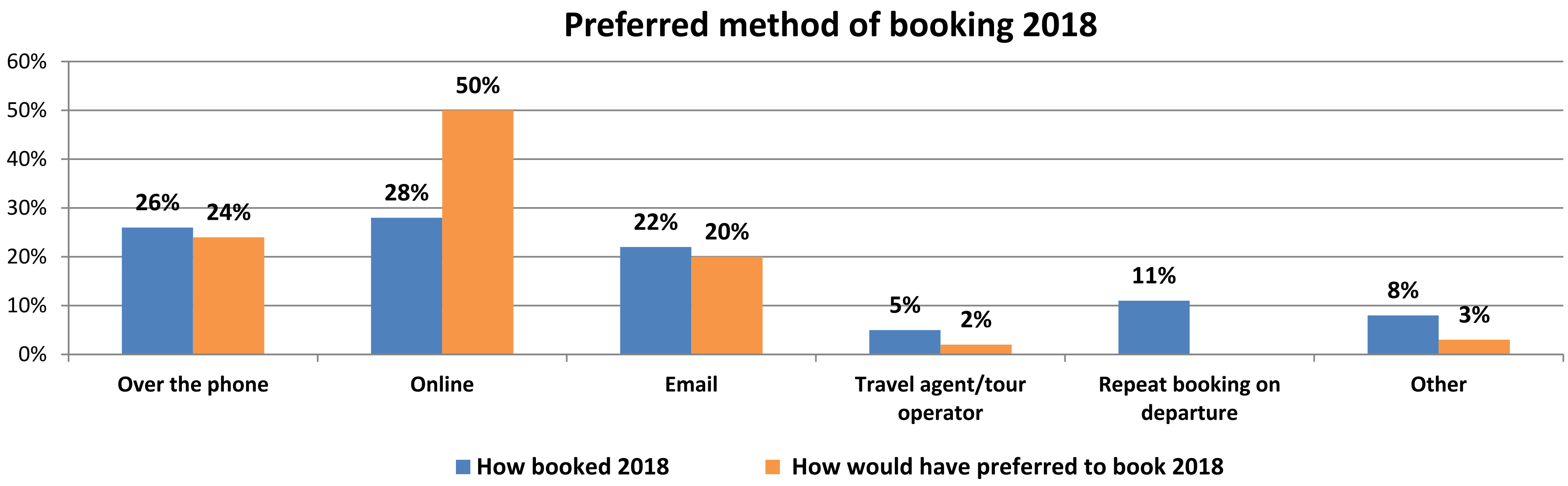
50% of respondents preferred to book online compared with the 28% of respondents who actually did so.

When asked which their preferred method of booking was, 50% of respondents preferred to do so online, compared with the 28% who actually did so (50% and 27% during the 2017 survey and 47% and 29% during the 2016 survey).

24% of respondents preferred to book over the phone compared with the 26% who actually did so (similar proportions to 2016 and 2017) and 20% preferred to book via email, compared with the 22% who actually did so (the same proportions as during 2017 and compared with 21% and 24% respectively during 2016).

No respondents said they preferred to make a repeat booking on their departure, compared with the 11% who actually did so and 2% preferred to book with a travel agent/tour operator compared with the 5% 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 2,002

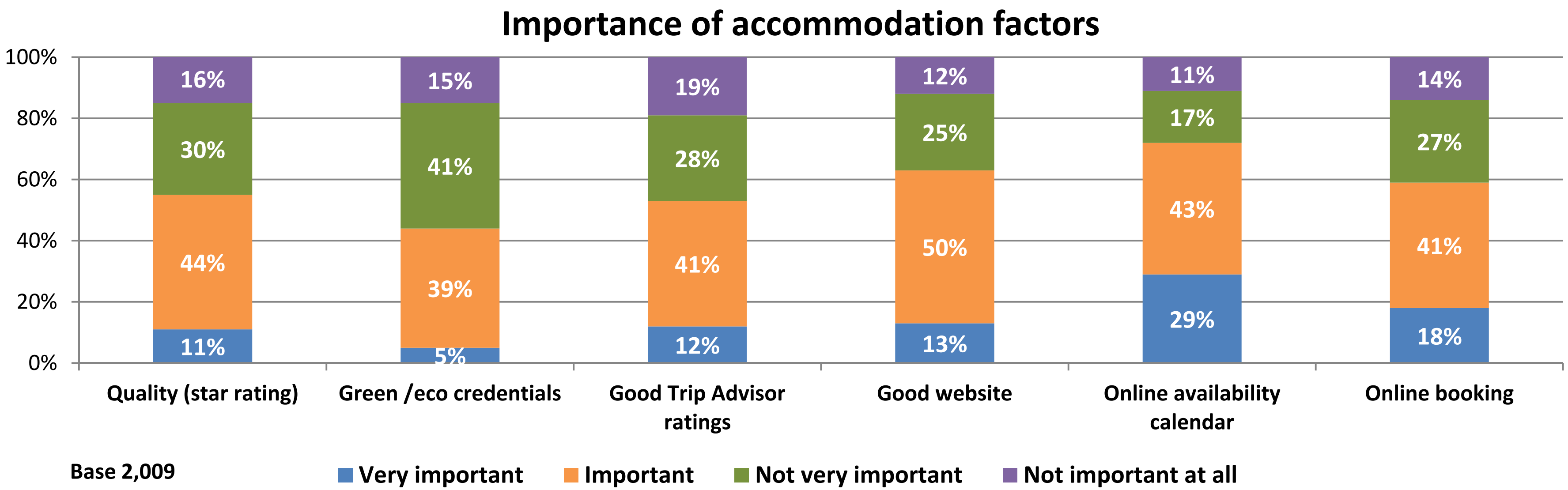
An establishment having an online availability calendar was considered of highest importance to visitors when choosing their accommodation to stay in on the Islands, followed by it having a good website and the facility to online booking.

Respondents were asked how important a number of different factors were to them when choosing their accommodation on the Islands. This was a new question for all factors except having a quality (star rating) which was asked in previous surveys.

Respondents rated the accommodation having an online availability calendar of highest importance to them (72% said this was 'very important' or 'important'), followed by it having a good website (63% said this was 'very important' or 'important') and the facility to book online (59% said this was 'very important' or 'important').

55% of respondents felt it was 'very important' (11%) or 'important' (44%) that their accommodation on the Islands had a quality (star) rating, a decrease of 10% compared with 2016 and 2017 and compared with 59% and 67% during the 2015 and 2014 surveys respectively. A similar proportion (53%) felt it was 'very important' or 'important' that their accommodation had good Trip Advisor ratings, whilst 44% said the same about the accommodation having green/eco credentials.

There was little variation in the results by analysis segment.

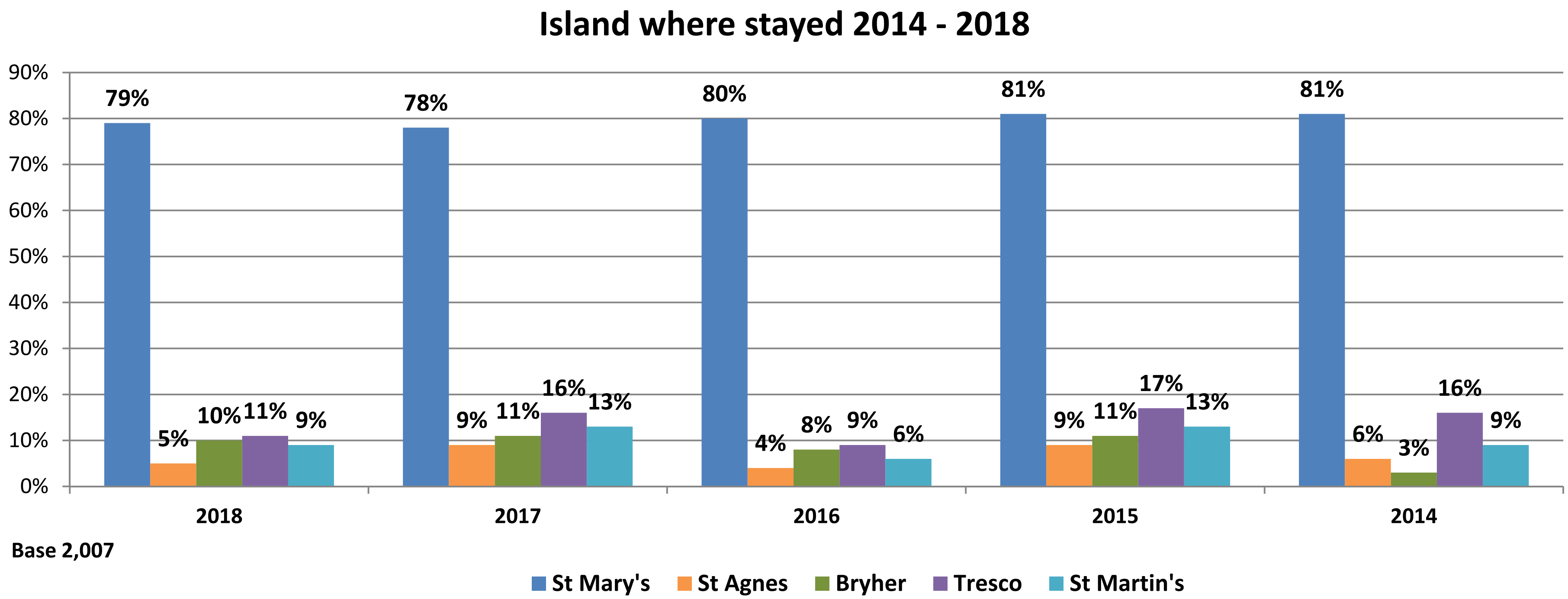


79% of respondents had stayed on St. Mary's.

79% of respondents had stayed on St. Mary's during their visit to the Islands – a similar proportion to previous years.

11% of respondents had stayed on Tresco (16% 2017, 9% 2016, 17% 2015 and 16% 2014), 10% on Bryher (similar to previous years except the base year of 2014 – 3%), 9% on St Martin's (13% 2017, 6% 2016, 13% 2015 and 9% 2014) and 5% on St. Agnes (9%, 4%, 9% and 6% during 2017, 2016, 2015 and 2014 respectively).

There was little variation in the results by analysis segment.

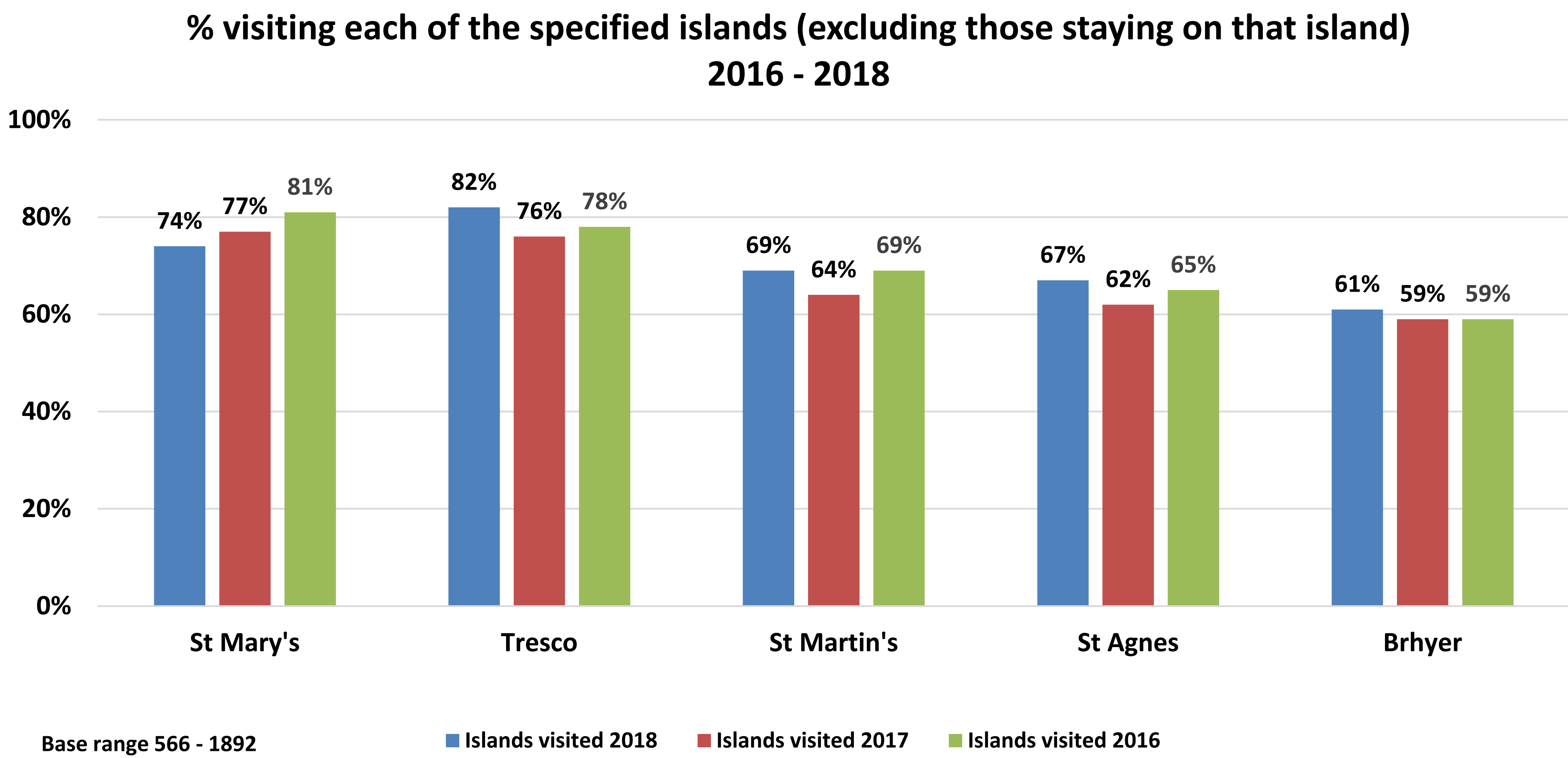


Please note that the results in the chart above do not sum to 100% due to this question being a multiple response question e.g. visitors could have stayed on more than one island during their visit to the Isles of Scilly.

Excluding those staying on the island in question, 82% of respondents had visited Tresco, 74% had visited St. Mary’s, 69% had visited St. Martin's, 67% had visited St. Agnes and 61% had visited Bryher.

Excluding those staying on the island in question, 82% of respondents had visited Tresco during their visit to the Scillys (76% 2017, 78% 2016), 74% had visited St.Mary’s (77% 2017 and 81% 2016), 69% St. Martin's (64% 2017, 69% 2016), 67% St. Agnes (62% 2017, 65% 2016) and 61% had visited Bryher (59% each in 2017 and 2016).

There is no comparable data available for the 2015 or 2014 surveys.



Base range 566 - 1892

82% of respondents staying on St. Mary's had visited Tresco as was also the case for 71% of respondents staying on St. Agnes, 87% staying on Bryher and 73% staying on St. Martin’s. 74% of respondents staying on Tresco had visited St. Mary’s along with 73% staying on St. Martin’s.

Island where stayed 2018	Islands visited 2018				
	ST MARY'S	ST AGNES	BRYHER	TRESCO	ST MARTINS
ST. MARY’S	-	73%	62%	82%	72%
ST. AGNES	69%	-	60%	71%	59%
BRYHER	72%	50%	-	87%	59%
TRESCO	74%	45%	69%	-	49%
ST. MARTIN'S	73%	53%	45%	73%	-

Base 1,934

Motivations & Information Sourcing

islands partnership

The South West Research Company

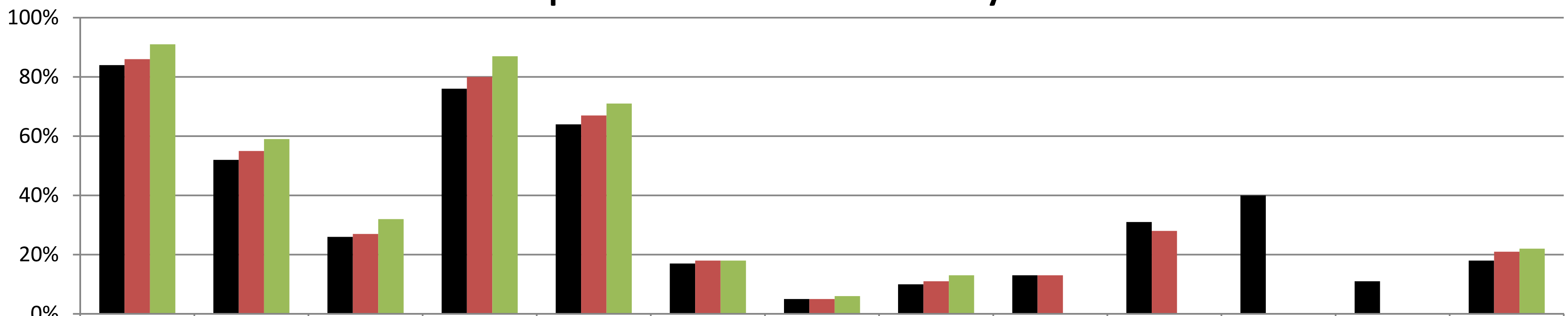
The scenery and/or peace & quiet (84% and 76% respectively) inspired the largest proportions of respondents to visit the Islands.

Survey respondents were asked what inspired them to visit the Isles of Scilly. At 84%, the scenery once again inspired the largest proportions of respondents to visit the Islands (compared with 86%, 91%, 92% and 81% during 2017, 2016, 2015 and 2014 respectively). This was closely followed by the peace & quiet (76%, compared with 80% 2017, 87% 2016, 86% 2015 and 79% 2014). 64% were inspired to visit by the beaches (67%, 71%, 70% and 64% during 2017, 2016, 2015 and 2014 respectively) and 52% by the wildlife (55% 2017, 59% 2016, 58% 2015 and 47% 2014).

Included as a factor for the first time during the 2018 survey, 40% of respondents said the local plants and gardens. 31% said the local food and drink had inspired them to visit (28% 2017), 26% said the history of the Isles of Scilly (27% in 2017, 32% in each case during 2016 & 2015 and 23% during 2014) and 17% said their friends or relatives who live on the Islands (18% in each case during 2017 and 2016 and compared with 20% in each case during 2015 and 2014).

18% 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 the method of transport used to travel to the Islands.

What inspired visit to the Isles of Scilly 2016 - 2018



	Scenery	Wildlife	History	Peace and quiet	Beaches	Friends or relatives	Event/festival	Child friendly location	Local arts & culture*	Local food & drink*	Local Plants & Gardens**	Dog Friendly Location**	Other
2018	84%	52%	26%	76%	64%	17%	5%	10%	13%	31%	40%	11%	18%
2017	86%	55%	27%	80%	67%	18%	5%	11%	13%	28%			21%
2016	91%	59%	32%	87%	71%	18%	6%	13%					22%

Base 2,270. * Included for the first time during the 2017 survey ** Included for the first time during the 2018 survey.

82% of first time visitors were inspired to visit the Islands because of the scenery, 72% by the peace & quiet, 57% by the beaches, 47% by the wildlife and 44% by the local plants & gardens.

	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	86%	74%	92%	83%	85%	81%	82%	85%	89%	85%	78%	79%	87%	88%
Wildlife	54%	31%	49%	52%	51%	59%	47%	54%	58%	52%	46%	47%	54%	59%
History	26%	31%	43%	27%	25%	22%	25%	27%	29%	26%	18%	23%	26%	30%
Peace & Quiet	76%	70%	82%	76%	77%	69%	72%	78%	77%	75%	75%	73%	76%	78%
Beaches	66%	52%	55%	60%	69%	55%	57%	67%	73%	62%	52%	55%	67%	70%
Friends or Relatives	18%	9%	8%	17%	17%	12%	15%	18%	18%	18%	17%	13%	17%	22%
Local Festival or Event	5%	4%	2%	6%	5%	4%	3%	6%	5%	6%	6%	6%	5%	5%
Child Friendly Location	10%	5%	6%	8%	12%	5%	4%	12%	14%	8%	2%	3%	9%	17%
Local Arts & Culture	13%	12%	14%	14%	12%	15%	11%	14%	15%	13%	9%	12%	13%	16%
Local Food & Drink	32%	16%	27%	30%	31%	30%	26%	33%	35%	31%	24%	24%	32%	36%
Local Plants & Gardens	41%	34%	41%	43%	37%	38%	44%	38%	41%	41%	41%	43%	41%	38%
Dog Friendly Location	12%	6%	8%	11%	11%	12%	8%	12%	13%	11%	8%	6%	12%	13%
Other	19%	20%	16%	20%	17%	19%	23%	17%	17%	20%	23%	22%	19%	16%

Analysis segment ranking the individual factor the highest

The largest proportion of visitors (40%) had first heard about the Isles of Scilly from a previous visit and 26% from a personal recommendation.

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

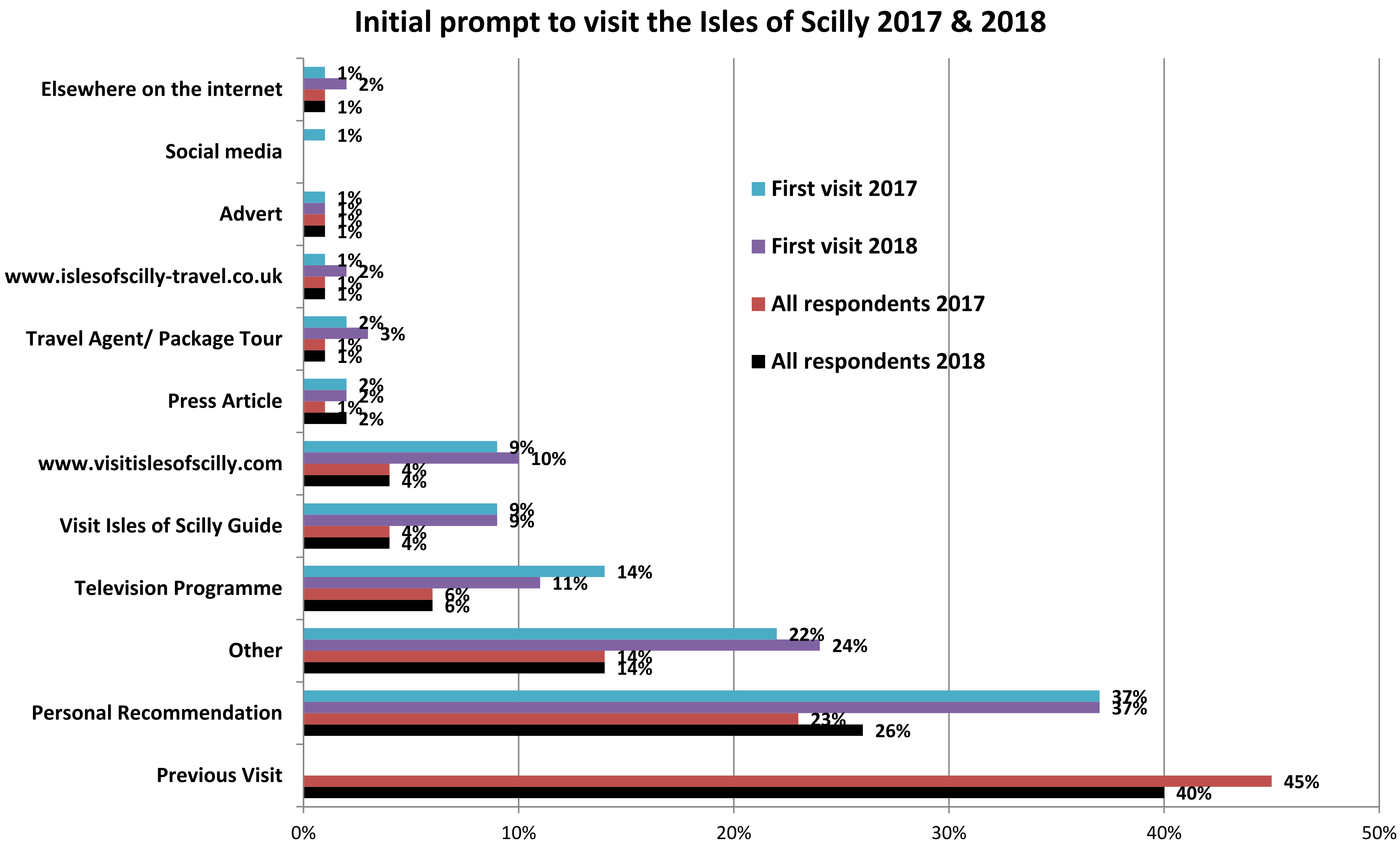
As the graph overleaf illustrates, 40% of respondents said from a previous visit (45% and 44% during 2017 and 2016 respectively) and 26% from a personal recommendation (23% 2017, 26% 2016), including 37% of first time visitors – the same proportion as 2017 and compared with 39% in 2016.

10% of first time visitors had initially been prompted to visit by the www.visitislesofscilly.com website (a similar proportion to 2017 and compared with 12% in 2016) and 9% by the Visit Isles of Scilly Guide (9% 2017, 11% 2016). 11% of first time visitors to the Islands had initially been prompted to visit by a television programme (14% 2017, 10% 2016).

The results by segment are shown on page 47. 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, the social media sites used and the full list of the other information sources used please refer to the appendices which accompany his report.

10% and 9% of first time visitors respectively had initially been prompted to visit by the www.visitislesofscilly.com website and/or by the Visit Isles of Scilly Guide. 11% had initially been prompted to visit by a television programme.



Base 2,220

55% 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	41%	23%	40%	38%	40%	50%	1%	55%	44%	40%	28%	30%	38%	51%
Personal Recommendation	27%	18%	28%	27%	27%	18%	37%	22%	26%	29%	28%	24%	29%	24%
Other	14%	20%	11%	15%	14%	15%	24%	10%	11%	15%	20%	19%	14%	11%
Television Programme	6%	8%	4%	6%	6%	3%	11%	4%	7%	5%	6%	6%	7%	4%
Visit Isles of Scilly Guide	4%	11%	13%	4%	4%	4%	9%	2%	4%	4%	5%	5%	4%	3%
www.visitislesofscilly.com	3%	8%	2%	3%	4%	6%	10%	1%	3%	3%	5%	5%	4%	3%
Press Article	2%	1%	-	2%	2%	2%	2%	2%	2%	3%	2%	3%	2%	2%
Travel Agent/Package Tour	1%	6%	-	1%	1%	1%	3%	1%	1%	1%	2%	2%	1%	-
www.islesofscilly-travel.co.uk	1%	1%	2%	1%	1%	-	2%	1%	1%	1%	2%	2%	1%	1%
Advert	1%	4%	-	1%	1%	2%	1%	1%	1%	-	1%	1%	-	1%
Social Media	-	-	-	-	-	-	-	-	-	-	-	1%	-	-
Elsewhere on the Internet	1%	1%	-	1%	1%	-	2%	-	1%	-	1%	1%	-	-

Analysis segment ranking the individual factor the highest

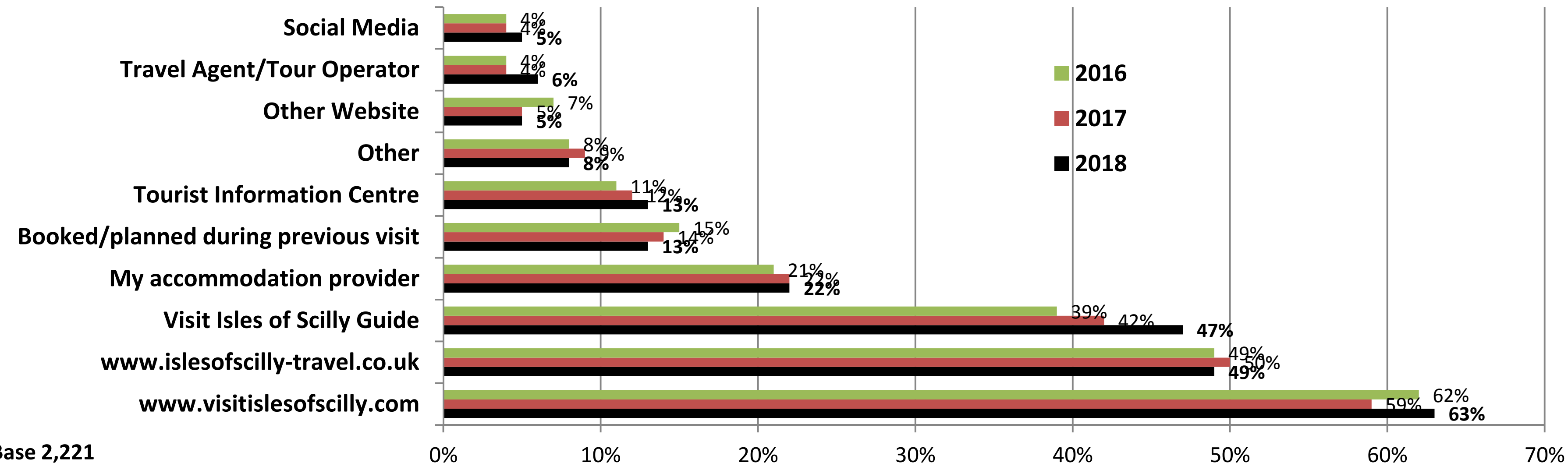
The www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites had been used by 63% and 49% of respondents respectively when planning and booking their visit to the Isles of Scilly.

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 63% and 49% of respondents respectively (59% and 50% during 2017 respectively and 62% and 49% during 2016 respectively).

47% of respondents had used the Visit Isles of Scilly guide (42% 2017, 39% 2016) whilst 22% said they had sourced information from their accommodation provider (the same or similar proportion as 2017 and 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 (5%) and the full list of the other information sources used to plan and book (8%) please refer to the appendices which accompany his report.

Sources of information used when planning and booking visit to the Isles of Scilly 2016 - 2018



Base 2,221

The www.visitislesofscilly.com website was used by 64% of staying visitors and 76% of first time visitors when planning and booking their visit to the Islands. The www.islesofscilly-travel.co.uk website was used by 50% of staying visitors and 51% of repeat visitors. 47% of staying visitors had used the Visit Isles of Scilly Guide along with 64% 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	64%	46%	43%	61%	65%	66%	76%	57%	62%	66%	63%	69%	68%	52%
www.islesofscilly-travel.co.uk	50%	37%	47%	47%	50%	52%	44%	51%	52%	49%	41%	44%	51%	50%
Visit Isles of Scilly Guide	47%	40%	38%	46%	48%	41%	64%	39%	48%	46%	47%	48%	50%	39%
My accommodation provider	23%	9%	36%	23%	20%	26%	16%	25%	25%	23%	17%	18%	22%	28%
Booked/planned during previous visit	13%	2%	13%	13%	12%	9%	1%	17%	16%	13%	4%	5%	10%	24%
Tourist Information Centre	12%	23%	11%	13%	13%	8%	13%	12%	13%	13%	9%	9%	12%	14%
Other	8%	9%	15%	8%	7%	5%	7%	8%	7%	7%	10%	7%	8%	7%
Other website	5%	5%	11%	4%	6%	3%	6%	5%	5%	6%	5%	5%	5%	6%
Travel Agent/Tour Operator	5%	7%	9%	6%	5%	6%	9%	4%	5%	4%	10%	10%	5%	3%
Social media	5%	2%	6%	5%	5%	2%	5%	5%	5%	4%	6%	6%	5%	5%

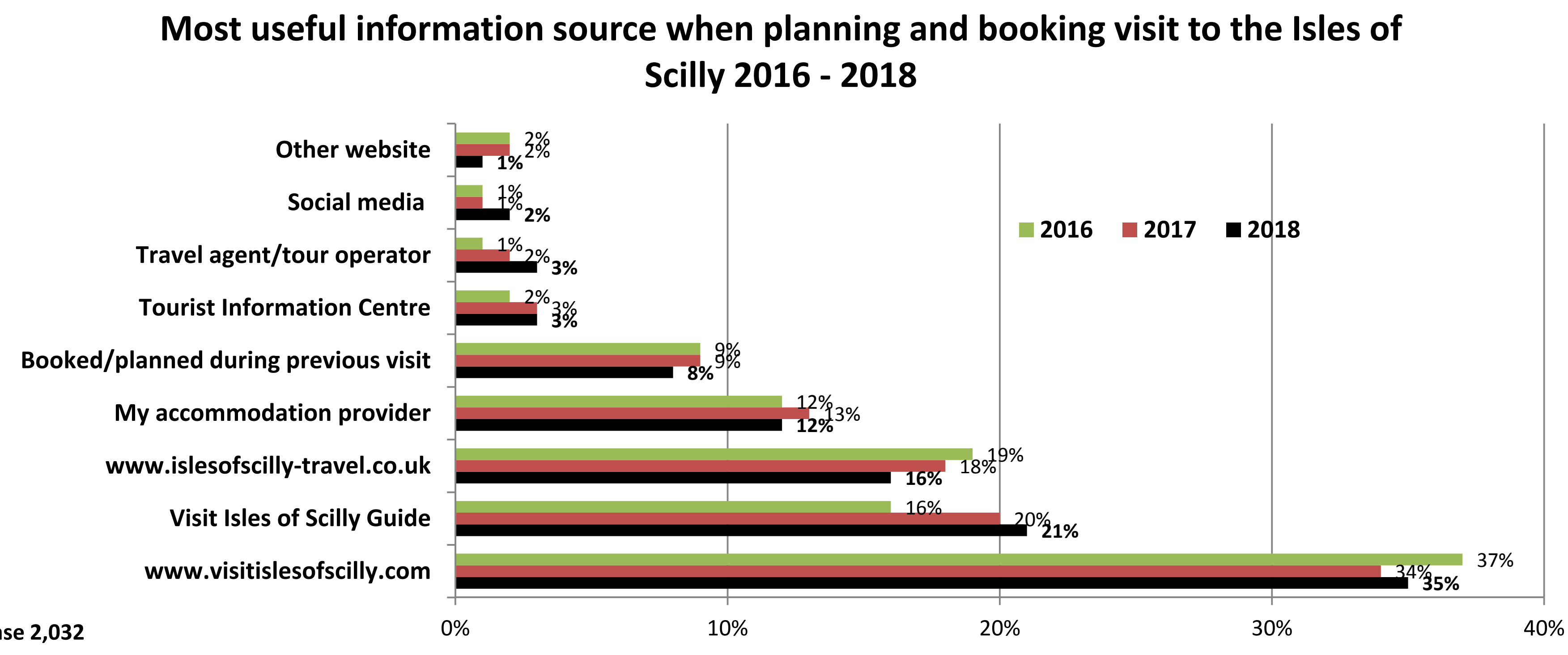
Analysis segment ranking the individual factor the highest

35% 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.

35% of respondents said the www.visitislesofscilly.com website was most useful which is a similar proportion to previous years except for 2014 (24%). 21% said the Visit Isles of Scilly Guide (20%, 16%, 15% and 10% during 2017, 2016, 2015 and 2014 respectively) and a further 16% said the www.islesofscilly-travel.co.uk website which again is a similar proportion to previous years except for 2014 (24%).

12% said their accommodation provider (similar proportion to previous years) and 8% said they had booked/planned their trip during a previous visit to the Islands (which is a similar proportion to previous years except for 2014 -11%). 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.



Base 2,032

The www.visitislesofscilly.com website was found most useful by 35% of staying visitors and 43% of first time visitors. The www.islesofscilly-travel.co.uk website was found most useful by 31% of day visitors and 32% of first time visitors.

	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	35%	27%	20%	33%	37%	36%	43%	31%	33%	37%	37%	40%	38%	26%
www.islesofscilly-travel.co.uk	20%	31%	23%	24%	19%	16%	32%	16%	19%	20%	26%	22%	22%	14%
Visit Isles of Scilly Guide	16%	18%	15%	14%	17%	21%	10%	18%	17%	15%	14%	16%	15%	18%
My accommodation provider	13%	3%	25%	12%	11%	16%	6%	15%	12%	14%	12%	12%	12%	15%
Booked/planned during previous visit	8%	3%	3%	9%	7%	7%	1%	11%	10%	7%	4%	2%	6%	16%
Tourist Information Centre	3%	9%	8%	3%	3%	-	3%	3%	3%	2%	2%	2%	2%	4%
Social media	3%	5%	5%	4%	3%	3%	5%	3%	3%	2%	5%	4%	3%	3%
Other website	2%	2%	3%	2%	2%	1%	1%	2%	2%	2%	1%	1%	2%	3%
Travel Agent/Tour Operator	1%	2%	-	1%	1%	-	1%	1%	1%	1%	1%	-	1%	2%

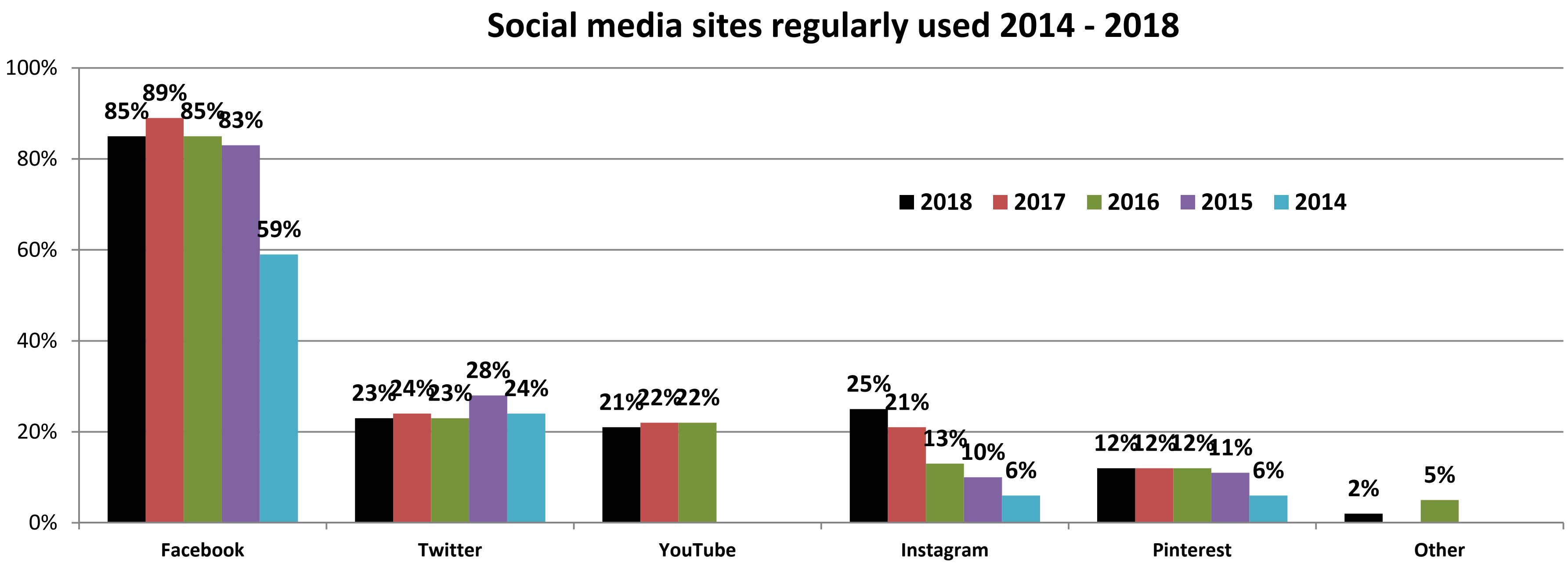
Analysis segment ranking the individual factor the highest

The majority of those on social media (85%) 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, 85%, which is a similar proportion to previous years except for 2014 (59%).

A further 23% of respondents regularly used Twitter (which is a similar proportion to previous years except for 2015 - 28%), 21% YouTube (22% in each case during 2016 and 2017 and not asked during 2015 and 2014), 25% Instagram (21%, 13%, 10% and 6% during 2017, 2016, 2015 and 2014 respectively), 12% Pinterest (the same proportion as during 2016 and 2017 and compared with 11% during 2015 and 6% during 2014). There was little variation in the results according to analysis segment.



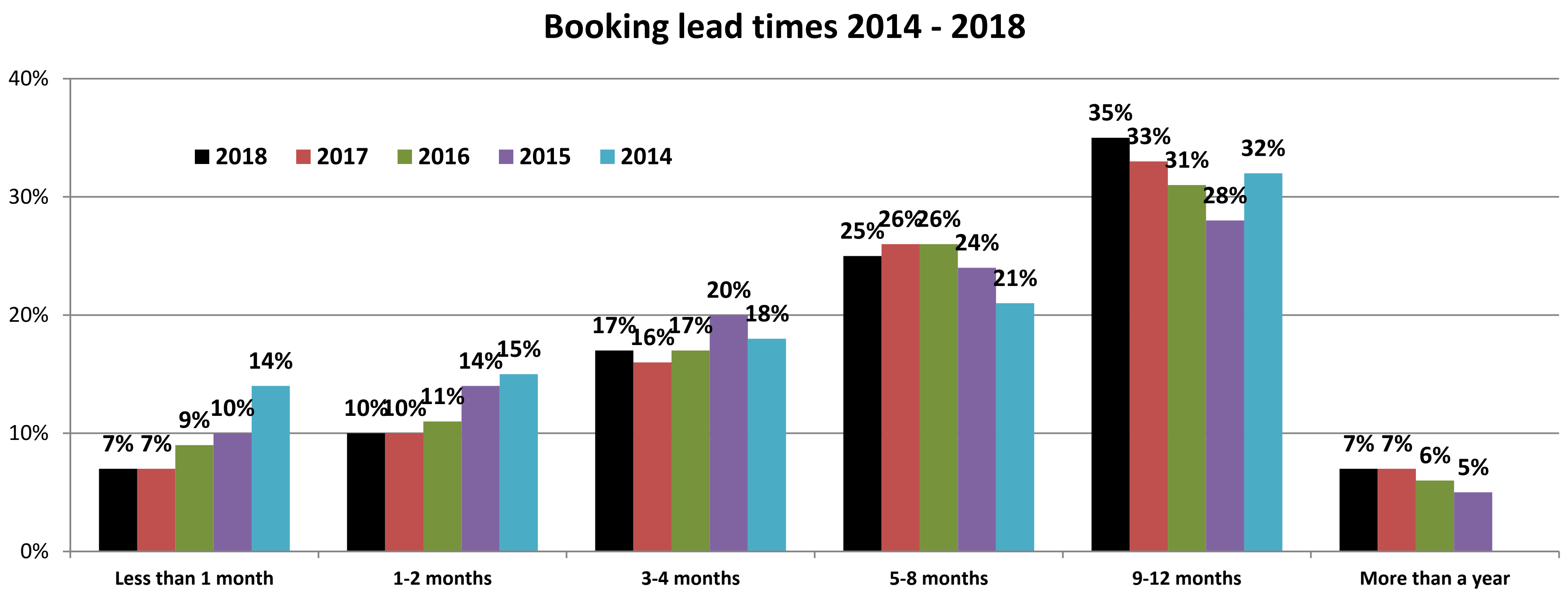
Base 1,415

42% 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.

35% of respondents had booked their holiday to the Islands 9-12 months in advance (which is a similar proportion to previous years except for 2015 - 28%). A further 25% had booked 5-8 months before their visit (which is a similar proportion to previous years except for 2014 (21%)).

17% of respondents had booked 3-4 months in advance (which is a similar proportion to previous years), 10% 1-2 months in advance (which is a similar proportion to previous years except for 2015, 14%, and 2014, 15%). Just 7% in each case had booked either less than one month before their actual holiday to the Islands (same proportion as 2017, 9%, 10% and 14% during 2016, 2015 and 2014 respectively) or more than a year in advance (same proportion as 2017, 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 2,218

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 (36%), those visiting the Islands during July to September (37%), previous visitors (42%), those on their main holiday (43%) and those staying for 8 or more days (49%) were the most likely to book their visit to the Isles of Scilly 9 months or more in advance.

Day visitors (36%), those visiting during July to September (8%), first time visitors (9%), those on a short break (15%), those arriving by private transport (58%) and those staying for 2-4 days (13%) were the most likely to book less than 1 month before their actual visit.

Booking lead times by analysis segment 2018	Less than 1 month	1-2 months	3-4 months	5-8 months	9-12 months	More than a year
STAYING	5%	9%	17%	25%	36%	7%
DAY	36%	13%	18%	14%	16%	4%
JAN-MAR	6%	13%	36%	15%	26%	4%
APR-JUN	5%	9%	20%	27%	33%	7%
JUL-SEP	8%	10%	14%	24%	37%	7%
OCT-DEC	7%	15%	27%	25%	24%	2%
FIRST TIME	9%	16%	25%	29%	18%	4%
REPEAT	6%	7%	14%	23%	42%	8%
MAIN	2%	7%	13%	25%	43%	10%
SECOND	5%	8%	19%	27%	36%	6%
SHORT	15%	20%	31%	22%	10%	2%

Booking lead times by analysis segment 2018	Less than 1 month	1-2 months	3-4 months	5-8 months	9-12 months	More than a year
SKYBUS	5%	8%	17%	27%	36%	7%
SCILLONIAN	6%	10%	18%	24%	35%	7%
HELICOPTER	7%	8%	27%	20%	27%	10%
PRIVATE	58%	13%	13%	6%	6%	3%
CRUISE	10%	5%	5%	24%	43%	14%
OTHER TRANSPORT	8%	11%	10%	24%	40%	8%
2-4 DAYS	13%	20%	29%	22%	13%	4%
5-7 DAYS	3%	9%	19%	28%	35%	5%
8+ DAYS	4%	4%	9%	22%	49%	13%

Base 2,218

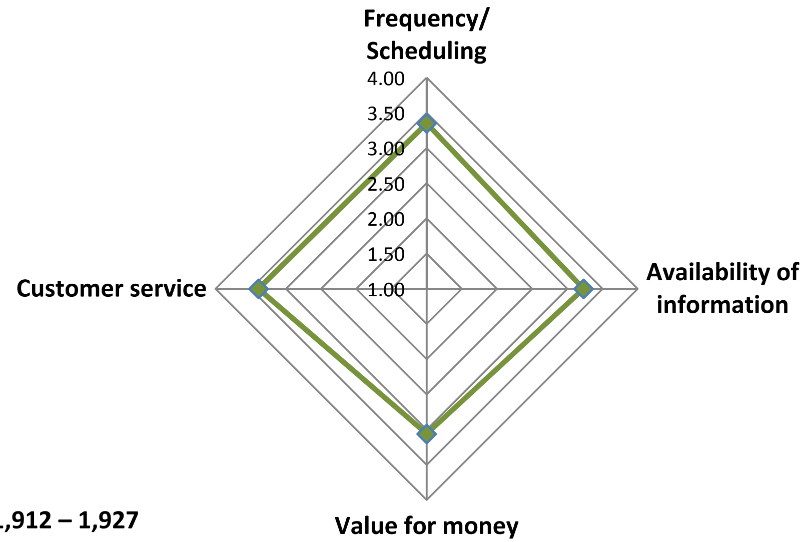
The Travel Experience

All factors related to satisfaction with inter-island boat travel received good average scores of between 3.06 and 3.39 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 3.06 and 3.39. The highest level of satisfaction was once again with customer service (3.39), followed by frequency/scheduling (3.35), the availability of information (3.23) and was lowest for the value for money (3.06). The results by analysis segment are shown in the table overleaf. Overall, satisfaction levels were lower than in previous years with the exception of value for money.

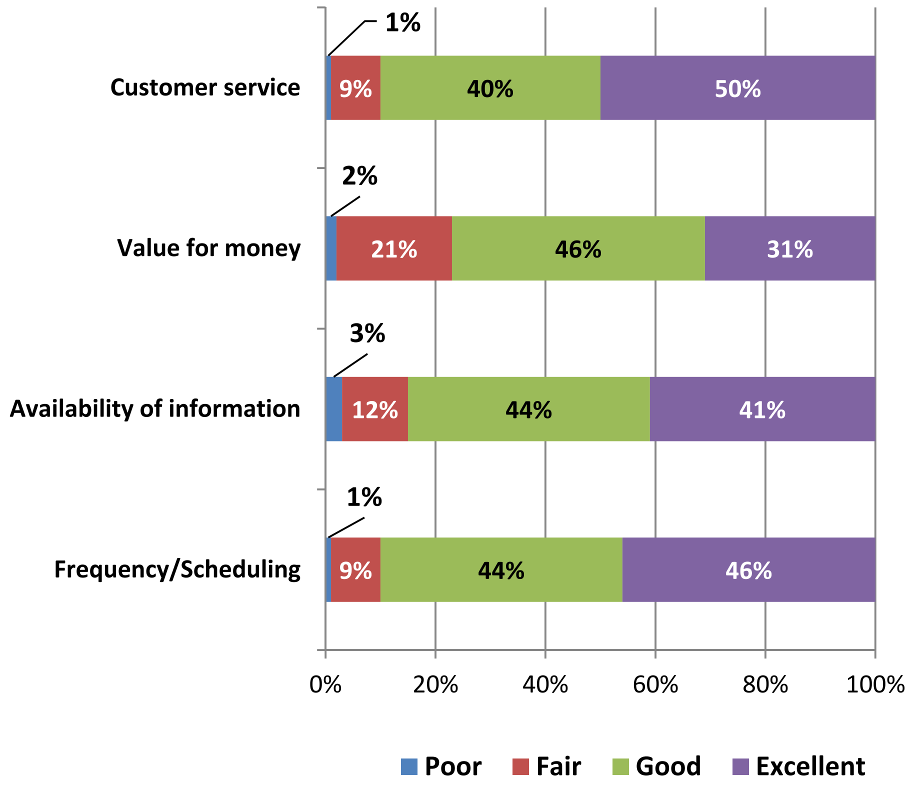
Satisfaction with inter-island boat travel



Base 1,912 – 1,927

Inter-island boat travel	Frequency/ scheduling	Availability of information	Value for money	Customer service
2018	**3.35**	**3.23**	**3.06**	**3.39**
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



Broadly speaking satisfaction levels with inter-island boat travel were higher amongst staying visitors, those visiting the Islands during April to September, amongst repeat visitors, those on their main holiday, those staying on St. Mary's, those travelling to the Islands via the island helicopters and those staying 8+ days.

Mean satisfaction score out of a max. of 4.00 2018	Frequency/Scheduling	Availability of information	Value for money	Customer service
STAYING	3.36	3.24	3.06	3.40
DAY	3.00	2.81	2.81	3.03
JAN-MAR	3.03	3.06	3.06	3.35
APR-JUN	3.35	3.23	3.09	3.39
JUL-SEP	3.36	3.23	3.05	3.40
OCT-DEC	3.25	3.21	2.91	3.30
FIRST TIME	3.27	3.19	3.15	3.36
REPEAT	3.38	3.25	3.03	3.40
MAIN	3.41	3.27	3.09	3.44
SECOND	3.29	3.17	3.01	3.33
SHORT	3.24	3.20	3.02	3.33
ST MARY'S	3.43	3.29	3.13	3.42
ST AGNES	3.29	3.24	3.03	3.41
BRYHER	3.20	3.14	2.87	3.30
TRESCO	3.22	3.08	2.96	3.39
ST MARTIN'S	2.92	2.97	2.82	3.21
SKYBUS	3.38	3.25	3.10	3.41
SCILLONIAN	3.33	3.22	3.04	3.39
HELICOPTER	3.37	3.33	3.13	3.44
PRIVATE	3.14	3.14	2.93	3.25
CRUISE	2.67	2.50	2.50	2.50
OTHER TRANSPORT	3.36	3.15	2.88	3.29
2-4 DAYS	3.24	3.19	3.09	3.35
5-7 DAYS	3.36	3.24	3.08	3.39
8+ DAYS	3.40	3.25	3.02	3.43

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 provided but the key themes revolved around better information provision and frequency of 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. It should be noted that many comments were complimentary and a good proportion of respondents like things the way they are.

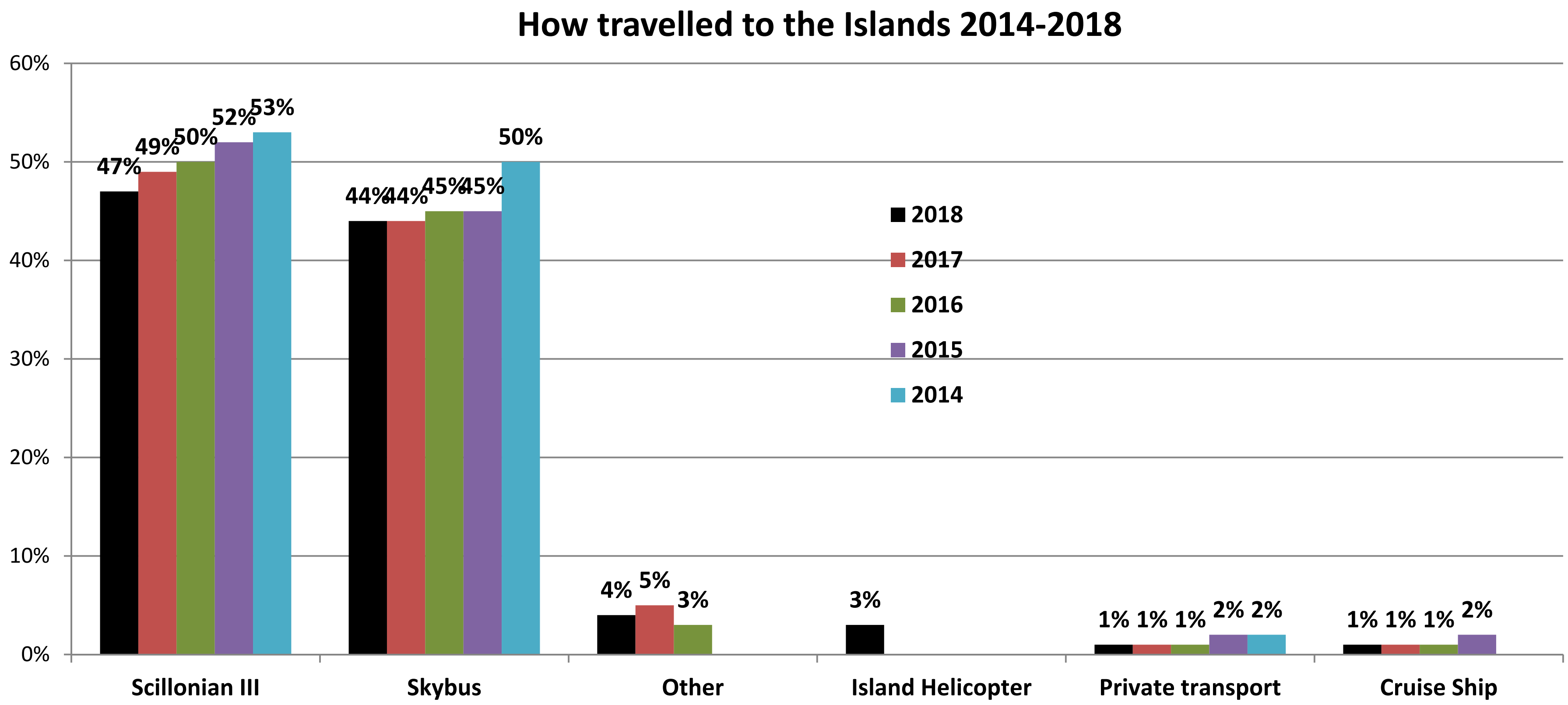
The key themes coming out of the comments were for more/better information (32%), more frequent/better sailing times (28%), information through a website/online or an app (12%), better booking options (6%) and the cost of travel (5%).

	Count	%
More /better information	174	**32%**
More frequent/better sailing times	152	**28%**
Website/online/app info	64	**12%**
Better booking options	34	**6%**
Cost	25	**5%**

47% of respondents had travelled to the Islands on the Scillonian and a further 44% via the Skybus.

47% of respondents had travelled to the Islands on the Scillonian which is a 2% decrease from 2017 and a 6% decrease from the base year of 2014. A further 44% used the Skybus which is a similar proportion to previous years except for 2014 (50%).

The results by analysis segment are shown overleaf.



Base 2,096

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

The majority of all segments arrived by Scillonian or Skybus. Skybus was most popular across the year except for during July to September, for those on second holidays or short breaks and for those staying on Tresco. The Scillonian was the most popular choice for all other segments.

Method of travelling to the islands 2018	Scillonian	Skybus	Other	Island Helicopters	Cruise Ship	Private Transport
STAYING	47%	44%	4%	3%	0%	1%
DAY	48%	32%	3%	2%	12%	3%
JAN-MAR	28%	67%	2%	2%	0%	0%
APR-JUN	44%	48%	3%	2%	1%	2%
JUL-SEP	50%	40%	4%	3%	1%	1%
OCT-DEC	43%	48%	7%	3%	0%	0%
FIRST TIME	46%	42%	4%	2%	3%	2%
REPEAT	48%	44%	4%	3%	0%	1%
MAIN	51%	42%	4%	3%	0%	1%
SECOND	44%	47%	5%	3%	0%	2%
SHORT	41%	48%	4%	3%	1%	3%
ST MARY’S	48%	44%	4%	3%	0%	1%
ST AGNES	60%	28%	2%	0%	0%	10%
BRYHER	44%	43%	4%	4%	0%	4%
TRESCO	26%	58%	6%	4%	1%	5%
ST MARTIN’S	53%	35%	6%	3%	1%	3%
2-4 DAYS	48%	41%	4%	4%	0%	3%
5-7 DAYS	47%	45%	3%	3%	0%	1%
8+ DAYS	47%	44%	5%	3%	0%	1%

Base 2,096

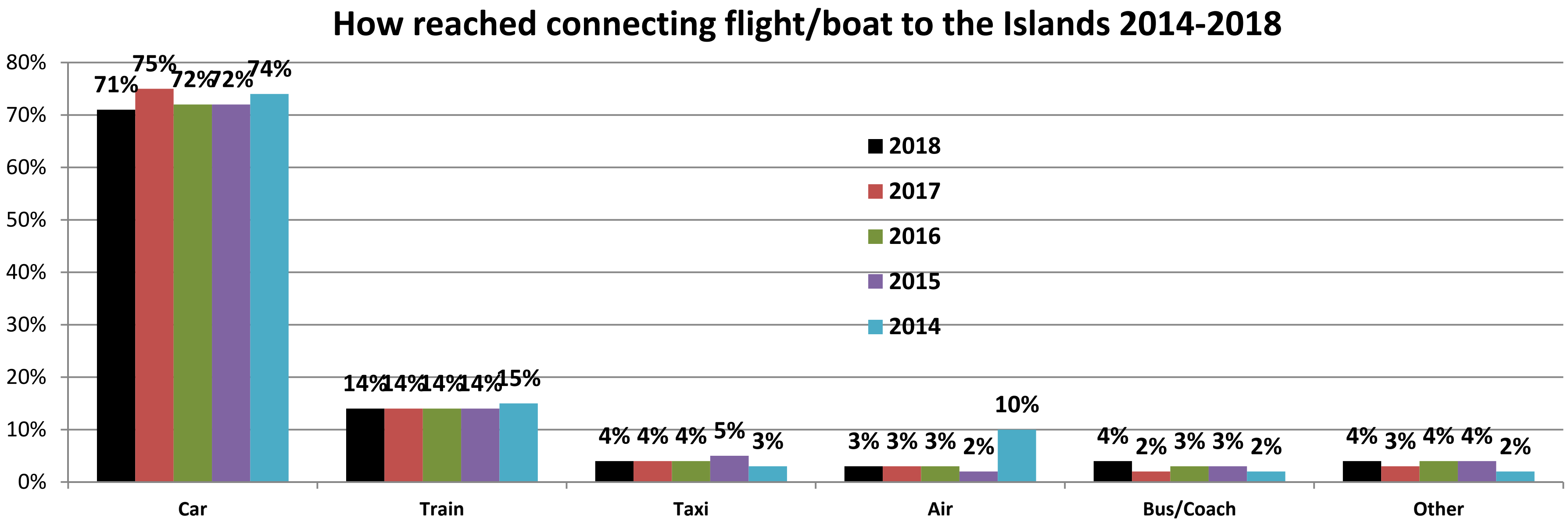
71% of respondents had reached their connecting flight or boat to the Islands by car.

71% of respondents had reached their connecting flight or boat to the Islands by car (compared with 75% in 2017, 72% in each case during 2016 and 2015 and 74% during 2014). Overall this should be viewed as relatively consistent across the time period.

A further 14% of respondents had reached their connection by train, 4% by taxi, 4% by bus/coach and 3% by air. All of these proportions are broadly similar to previous survey years with the exception of air travel in 2014 which peaked at 10%.

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

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



Base 1,930

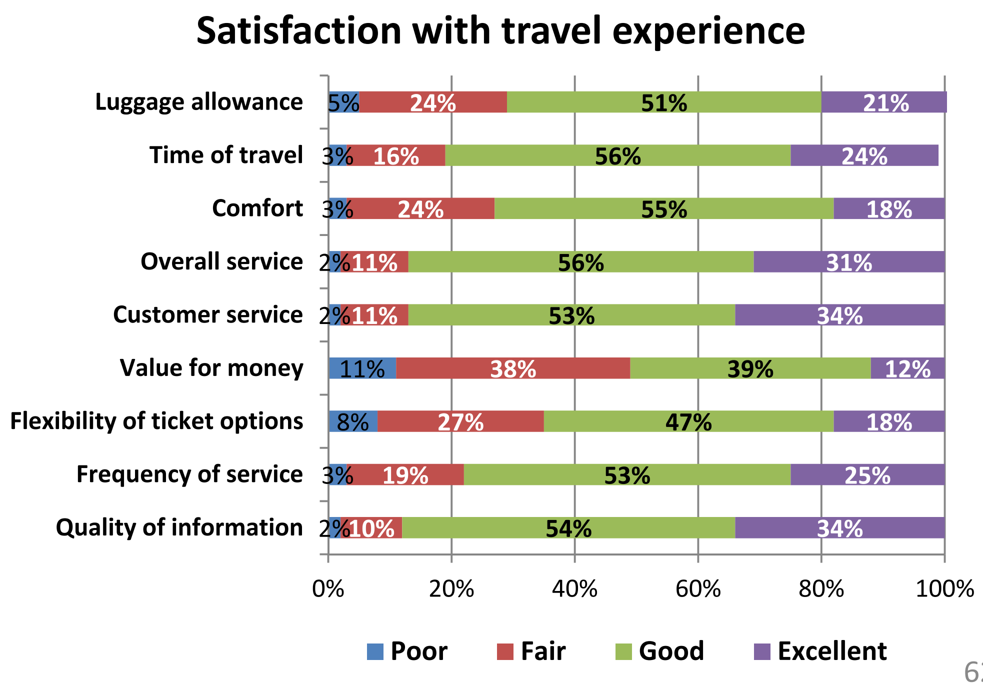
The quality of the travel information, frequency of service, customer service, time of travel and overall service all received good average scores of between 3.01 and 3.21 out of 4.00.

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, time of travel and overall service all received good average scores of between 3.01 and 3.21 out of 4.00. The flexibility of ticket options, value for money of travel, comfort of travel and luggage allowance all received lower average scores of between 2.52 and 2.89 out of 4.00. The highest level of satisfaction was with the quality of travel information (3.21) and was lowest for value for money of travel to the Islands (2.52) with little movement in either of these scores compared to 2017.

The results by segment are shown in the table overleaf. Overall, satisfaction levels amongst visitors regarding their travel experience were similar to 2017.

Base 1,868 – 1,925



Broadly speaking, satisfaction levels with the travel experience were higher amongst day visitors, those visiting the Islands during January to March or July to September, amongst first time visitors, those on their main holiday of the year, those staying on St. Mary's, those travelling to the Islands via the Skybus and those staying 5-7 days.

Mean satisfaction score out of a max. of 4.00 2018	Quality of information	Frequency of service	Flexibility of ticket options	Value for money	Customer service	Overall service	Comfort	Time of travel	Luggage allowance
STAYING	3.21	3.01	2.75	2.51	3.19	3.16	2.88	3.01	2.88
DAY	3.29	3.03	2.90	2.75	3.28	3.27	3.06	3.06	2.88
JAN-MAR	3.30	3.12	2.67	2.60	3.21	3.19	2.83	3.09	2.88
APR-JUN	3.19	2.99	2.75	2.48	3.16	3.12	2.86	3.00	2.85
JUL-SEP	3.23	3.01	2.78	2.55	3.21	3.19	2.92	3.01	2.89
OCT-DEC	3.13	2.98	2.71	2.46	3.18	3.18	2.81	2.95	2.88
FIRST TIME	3.24	3.02	2.86	2.63	3.25	3.22	2.95	3.03	2.92
REPEAT	3.20	3.00	2.72	2.47	3.17	3.14	2.87	3.01	2.86
MAIN	3.23	3.03	2.78	2.55	3.21	3.17	2.91	3.04	2.88
SECOND	3.18	2.95	2.72	2.45	3.13	3.11	2.83	2.96	2.82
SHORT	3.18	2.99	2.73	2.46	3.20	3.20	2.90	2.99	3.00
ST MARY'S	3.23	3.02	2.79	2.54	3.22	3.20	2.92	3.04	2.91
ST AGNES	3.15	2.97	2.74	2.47	3.16	3.14	2.84	2.92	2.86
BRYHER	3.15	2.94	2.69	2.47	3.12	3.08	2.86	2.96	2.75
TRESCO	3.07	2.90	2.52	2.34	3.03	2.95	2.63	2.92	2.66
ST MARTIN'S	3.19	3.04	2.71	2.43	3.14	3.12	2.90	3.05	2.91
SKYBUS	3.26	3.13	2.77	2.32	3.23	3.21	2.93	3.16	2.66
SCILLONIAN	3.16	2.87	2.74	2.70	3.14	3.12	2.84	2.86	3.08
2-4 DAYS	3.15	2.96	2.75	2.53	3.22	3.18	2.95	3.01	3.05
5-7 DAYS	3.24	3.04	2.79	2.54	3.22	3.19	2.91	3.04	2.91
8+ DAYS	3.17	2.96	2.67	2.41	3.10	3.08	2.79	2.94	2.72
2018	3.21	3.01	2.76	2.52	3.19	3.17	2.89	3.01	2.88
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

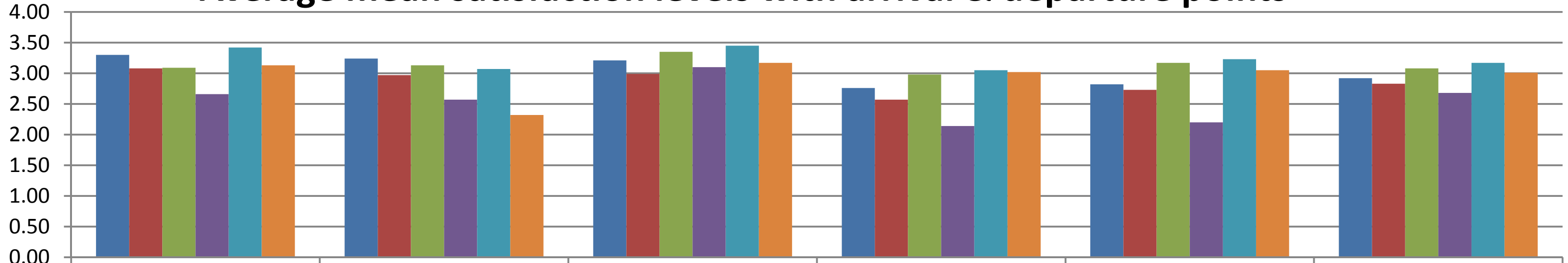
Analysis segment ranking the individual factor the highest

St Mary's Airport received the highest levels of satisfaction amongst visitors across all categories except car parking. 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 (3.42) and lowest at Penzance Quay (2.66). In terms of car parking, they were highest at Exeter (3.24) and lowest at St. Mary's Quay (2.32). Visitors' satisfaction levels in terms of customer service were highest at St Mary's Airport (3.45) and lowest at Newquay (2.99) and in terms of the range of facilities were highest at St Mary's Airport (3.05) and lowest at Penzance Quay (2.14). Visitors' satisfaction levels in terms of the quality of facilities were also highest at St Mary's Airport (3.23) and lowest again at Penzance Quay (2.20) and finally, in terms of the quality of information, they were again highest at St Mary's Airport (3.17) and lowest at Penzance Quay (2.68).

Average mean satisfaction levels with arrival & departure points



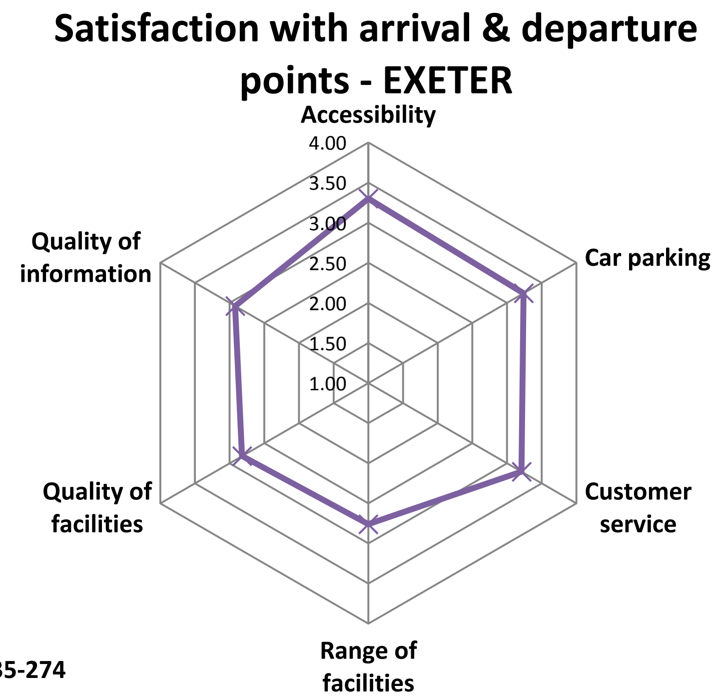
	Accessibility	Car Parking	Customer Service	Range of Facilities	Quality of Facilities	Quality of Information
Exeter	3.30	3.24	3.21	2.76	2.82	2.92
Newquay	3.08	2.97	2.99	2.57	2.73	2.83
Land's End	3.09	3.13	3.35	2.98	3.17	3.08
Penzance Quay	2.66	2.57	3.10	2.14	2.20	2.68
St Mary's Airport	3.42	3.07	3.45	3.05	3.23	3.17
St Mary's Quay	3.13	2.32	3.17	3.02	3.05	3.01

Base 182 – 1,372

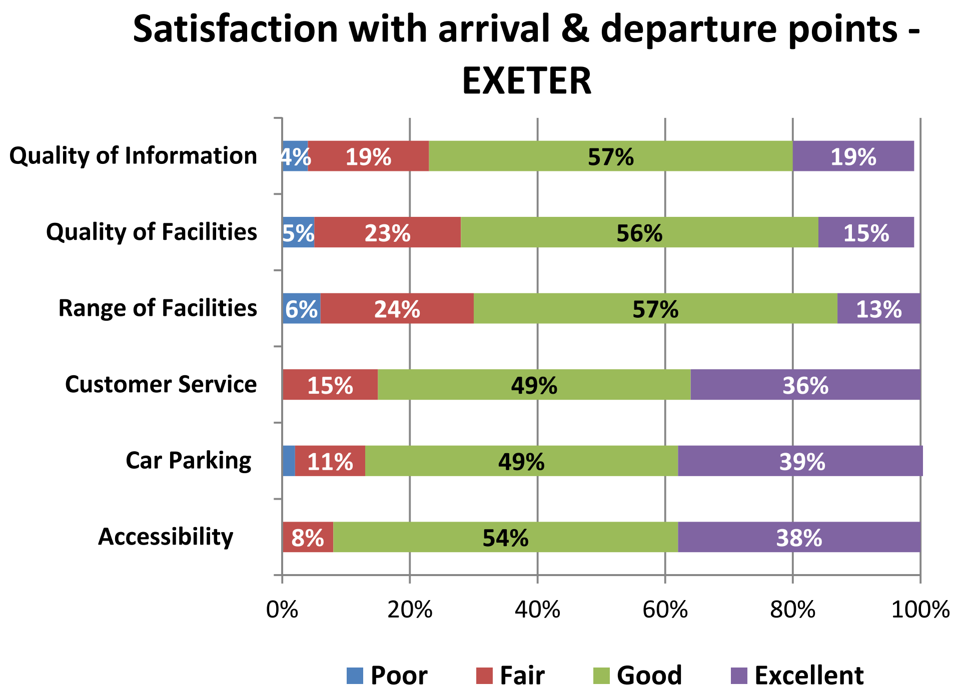
A number of respondents provided a comment about their arrival/departure points and these can be found in the appendices which accompany this report.

Exeter satisfaction scores in 2018 were higher or remained at a similar level to 2017.

Average scores at Exeter increased in 2018 compared to 2017 for all areas except the range of facilities which remained at the same level as in 2017. The highest level of satisfaction was for accessibility which increased from 3.20 in 2017 to 3.30 in 2018. The lowest satisfaction was for the range of facilities at 2.76 out of 4.00 with around a third of respondents rating this aspect as 'poor' or 'fair'.



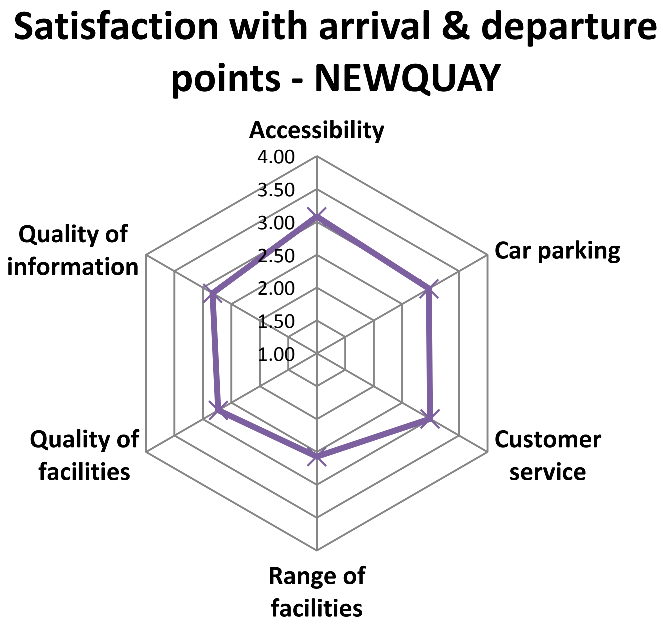
Base 235-274



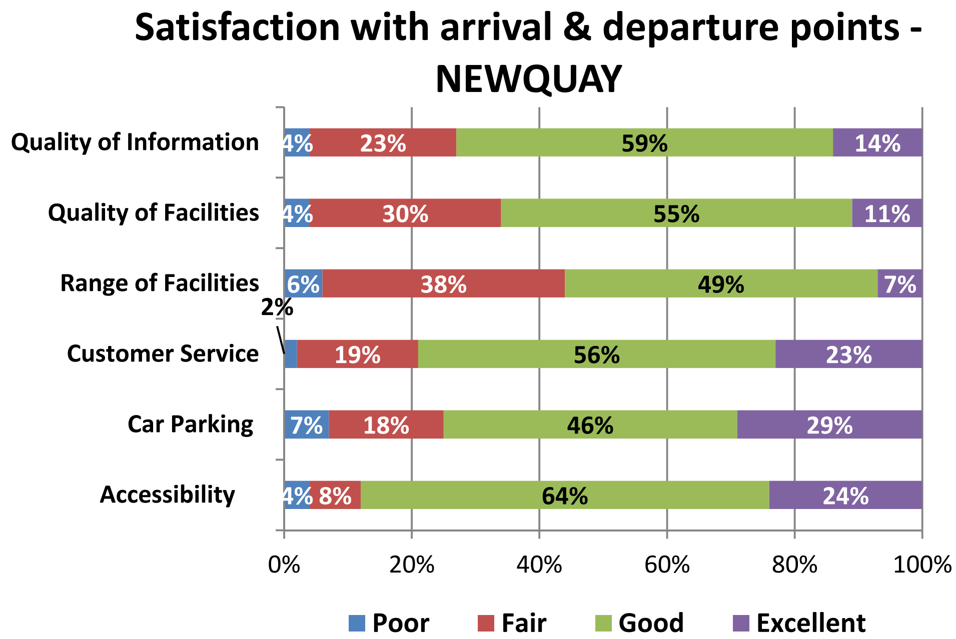
Exeter	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2018	**3.30**	**3.24**	**3.21**	**2.76**	**2.82**	**2.92**
2017	3.20	3.20	3.09	2.76	2.81	2.91
2016	3.25	3.27	3.07	2.70	2.76	2.92
2015	3.14	3.17	2.97	2.45	2.65	2.71

At Newquay all factors saw decreased satisfaction levels year on year which has broadly been the case since 2016.

At Newquay all factors saw decreased satisfaction levels compared to 2017. Just one indicator received a good score (accessibility – 3.08) with all other indicators receiving average scores of 2.99 or lower – the lowest being for the range of facilities at 2.57 out of 4.00 with 44% of respondents rating this aspect as ‘poor’ or ‘fair.



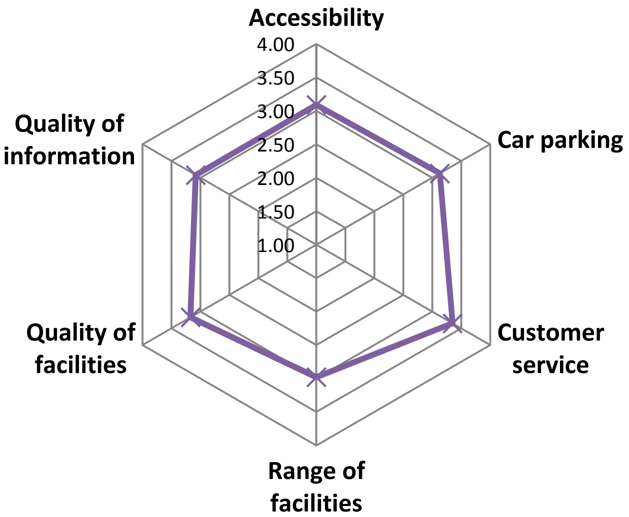
Base 152 - 189



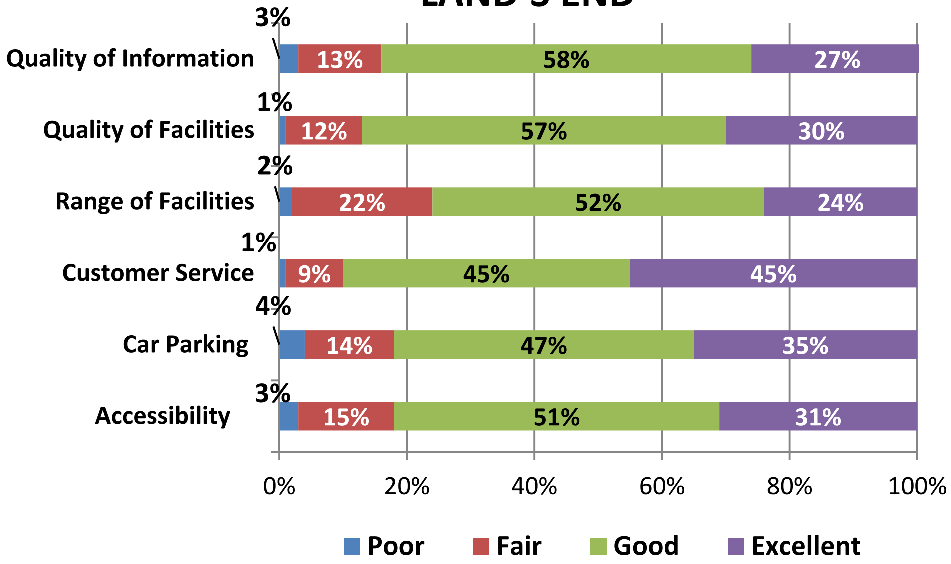
Newquay	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2018	**3.08**	**2.97**	**2.99**	**2.57**	**2.73**	**2.83**
2017	3.19	3.05	3.00	2.63	2.80	2.86
2016	3.19	3.19	3.20	2.72	2.83	2.92
2015	3.01	3.04	3.03	2.57	2.73	2.77

At Land's End all indicators saw decreased satisfaction levels for the second consecutive year.

Whilst five of the six indicators for Land's End received good average scores of 3.08 or higher in 2018 – the highest again being for customer service (3.35), all indicators saw decreased satisfaction levels compared with the previous year. The lowest indicator, with an average score of 2.98, was for the range of facilities.



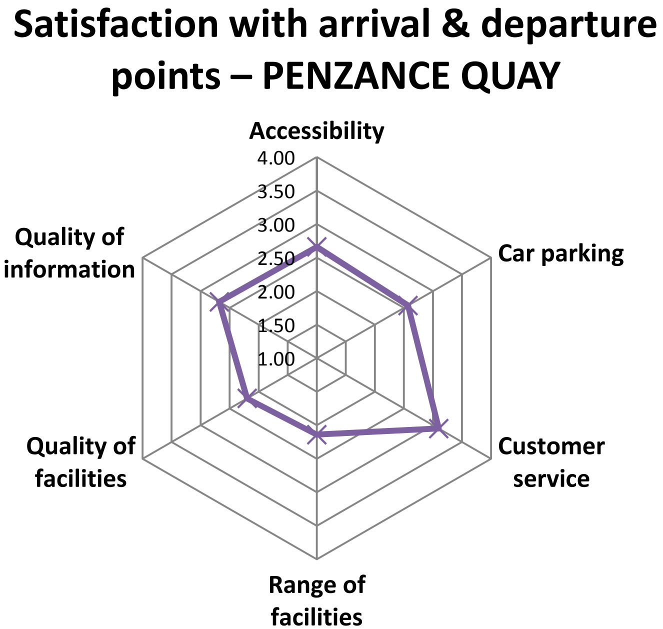
Base 432 - 506



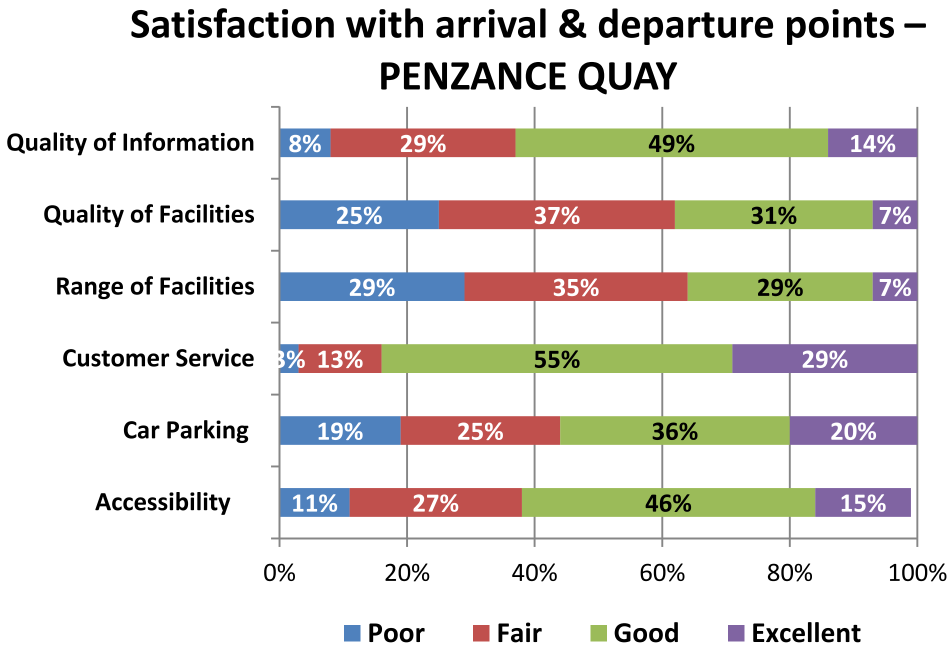
Land's End	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2018	**3.09**	**3.13**	**3.35**	**2.98**	**3.17**	**3.08**
2017	3.16	3.20	3.36	3.03	3.22	3.13
2016	3.24	3.25	3.43	3.12	3.33	3.22
2015	3.18	3.20	3.44	3.08	3.29	3.17

Whilst scores at Penzance Quay broadly remain average all six indicators increased compared to 2017.

There were increases in satisfaction levels across all indicators for Penzance Quay compared with last year. Customer service received a good score of 3.10 with the remaining five indicators receiving average scores of 2.68 or lower – the lowest being for the range of facilities at 2.14 out of 4.00 with 64% of respondents rating this indicator as 'poor' (29%) or 'fair' (35%).



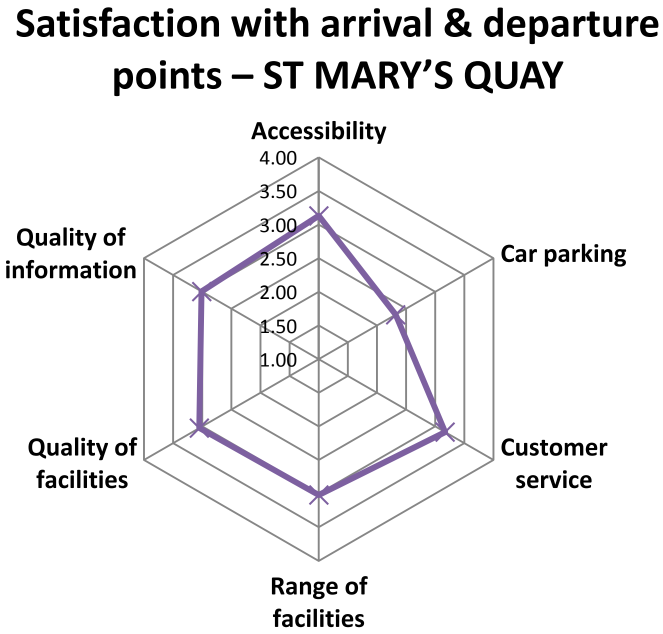
Base 793 - 970



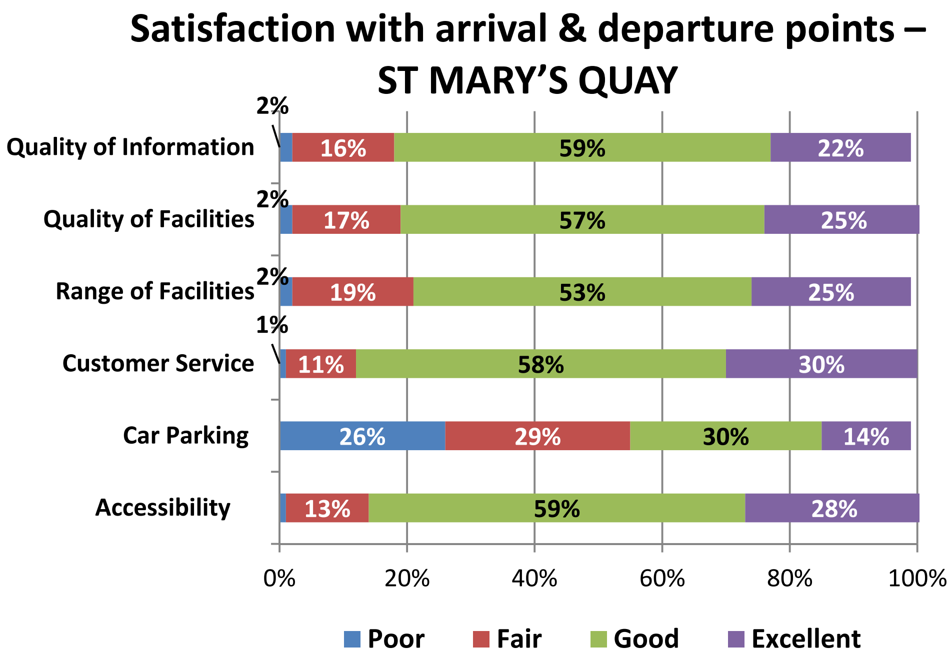
Penzance Quay	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2018	**2.66**	**2.57**	**3.1**	**2.14**	**2.2**	**2.68**
2017	2.63	2.45	3.08	2.07	2.13	2.63
2016	2.68	2.47	3.11	2.19	2.22	2.68
2015	2.55	2.46	2.99	1.99	2.05	2.58

Five of the six indicators for St. Mary's Quay increased compared to 2017.

At St. Mary's Quay five of the six indicators increased compared to 2017. Customer service (3.17) was the highest ranked indicator and one of five receiving good scores of 3.01 or more . Car parking (2.32) was the lowest ranked indicator with 55% of respondents rating this indicator as ‘poor’ (26%) or ‘fair’ (29%).



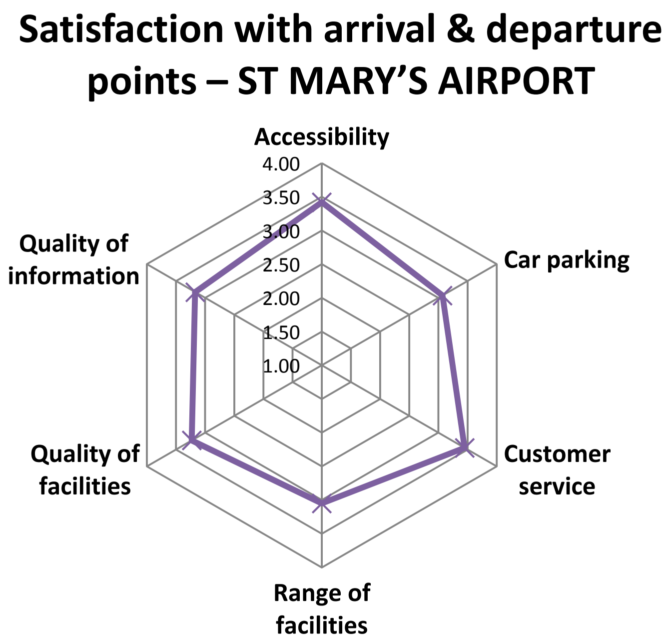
Base 436 - 969



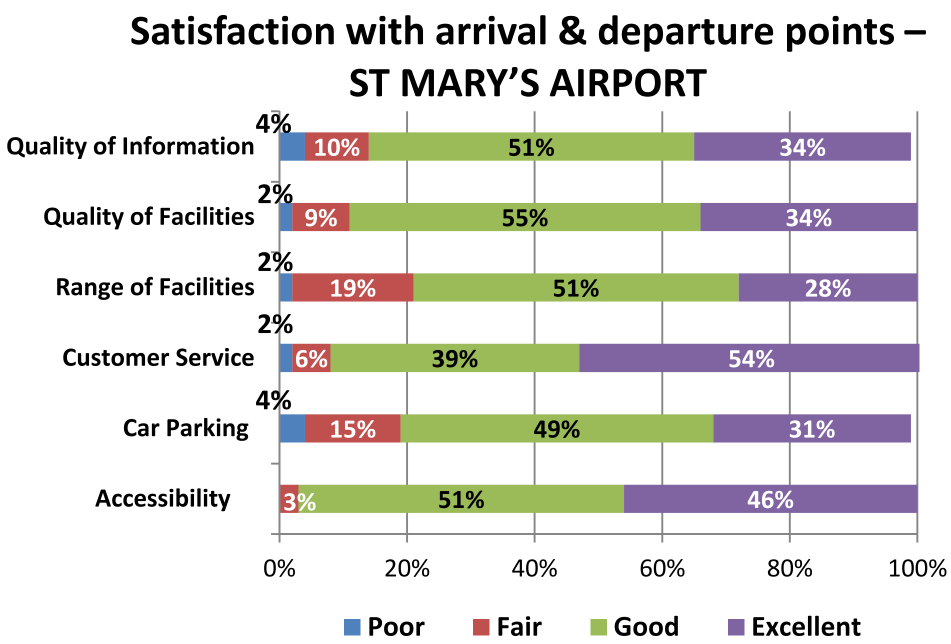
St. Mary's Quay	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2018	**3.13**	**2.32**	**3.17**	**3.02**	**3.05**	**3.01**
2017	3.17	2.25	3.16	2.93	2.98	2.99
2016	3.20	2.36	3.19	3.03	3.08	3.06
2015	2.94	2.12	3.06	2.59	2.68	2.80

Five of the six indicators for St. Mary's Airport decreased compared to 2017.

Five of the six indicators for St. Mary's Airport decreased compared to 2017. However, all six indicators received good average scores of 3.05 or higher including accessibility (3.42), car parking (3.07), customer service (3.45), range of facilities (3.05), quality of facilities (3.23) and quality of information (3.17).



Base 163 - 403



St. Mary's Airport	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2018	**3.42**	**3.07**	**3.45**	**3.05**	**3.23**	**3.17**
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

Around a quarter of 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.

Facilities at and connected to Penzance Quay remains the number one issue and mentioned by 39% of respondents. Other comments included parking availability/cost (14%), planning travel timings with train arrival times (12%), more airport options/routes to the island and cheaper travel (9% in each case).

	Count	%
Penzance Quay facilities	259	**39%**
Parking availability/cost	90	**14%**
Train connections with transport	77	**12%**
Airport options/routes	62	**9%**
Cost	60	**9%**
Delay procedures	49	**7%**
Penzance helicopter needed	43	**7%**
Sailing times	42	**6%**
Information communication	38	**6%**
Baggage collection procedures	28	**4%**
New ship/more stable/upgrade	19	**3%**

54% of respondents included a stop over in the South West as part of their visit to the Isles of Scilly.

54% of respondents (55% in 2017 and 78% in 2016) included a stop over in the South West as part of their visit to the Isles of Scilly (including 54% of staying visitors). A further 23% lived outside of the region but did not include a stop over in their trip (21% in 2017 and 3% 2016) and 23% lived in the South West and also didn't include a stop over in their trip (24% in 2017 and 18% in 2016). There was little significant variation amongst the analysis segments for this question.

Of those staying over in the South West 88% stayed in Cornwall (89% in 2017 and 88% in 2016) with 20% staying elsewhere in the region (17% in 2017 and 16% in 2016). Some visitors stayed in both Cornwall and elsewhere in the South West and as a result the data does not total to 100%.

71% (74% in 2017 and 68% in 2016) of those including an overnight stop stayed for one night before travelling on to the Isles of Scilly (72% in Cornwall and 72% in other South West locations). 36% stayed for one night when returning from Scilly (33% in 2017 and 2% in 2016), 29% had a longer stay before going to Scilly (27% in both 2017 and 2016) and 22% had a longer stay upon returning from Scilly (21% in 2017 and 3% in 2016).

Base 1,028-1,049

Visitors' Opinions

Introduction

The 2018 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.

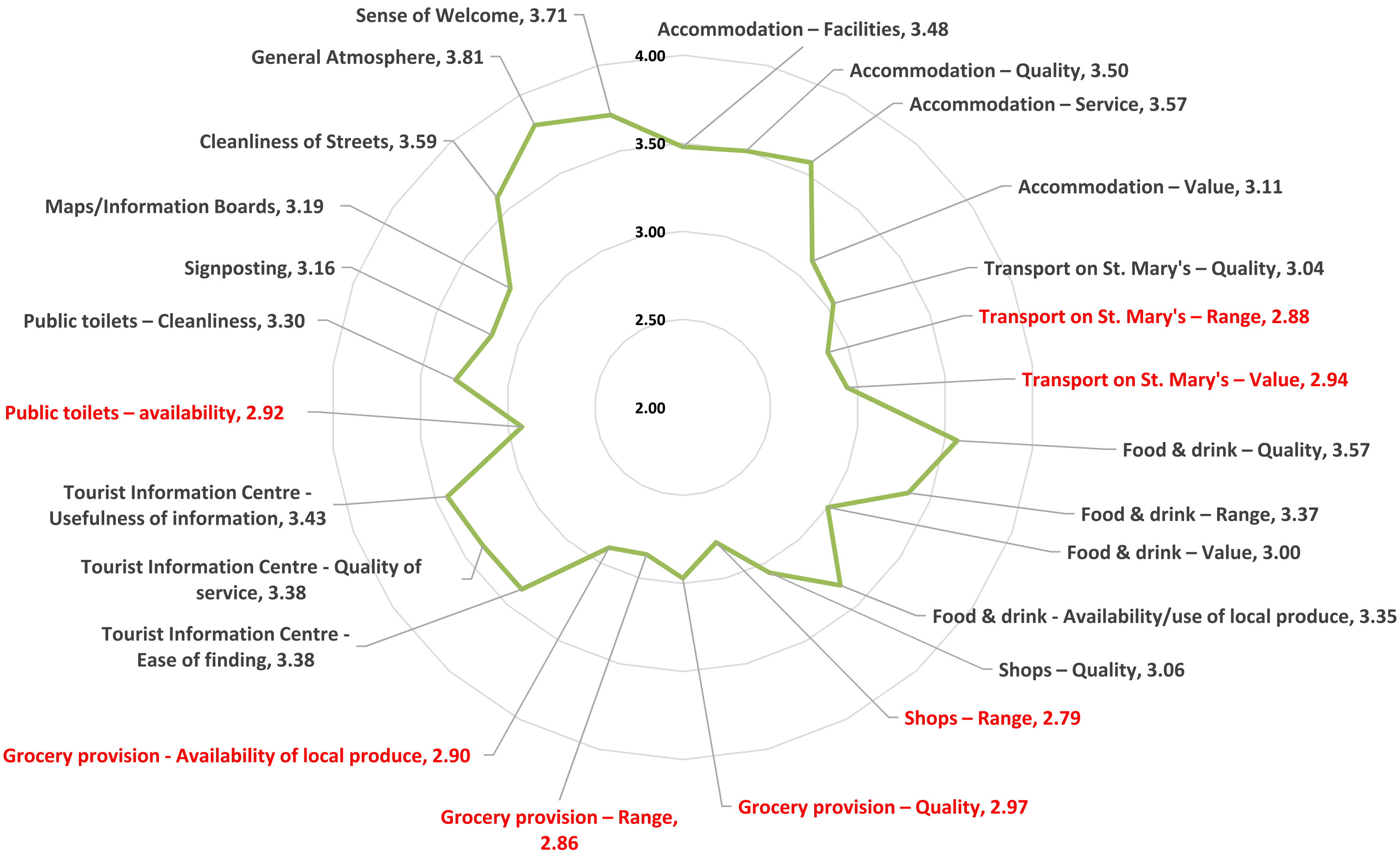
Satisfaction levels were again highest for the general atmosphere and sense of welcome and lowest for the range of shops and groceries.

#	Indicator	Mean score	Rank	#	Indicator	Mean score	Rank
1	Accommodation – Facilities	3.48	7	**14**	Grocery provision – Quality	2.97	20
2	Accommodation – Quality	3.50	6	**15**	Grocery provision – Range	2.86	25
3	Accommodation – Service	3.57	4	**16**	Grocery provision - Availability of local produce	2.90	23
4	Accommodation – Value	3.11	16	**17**	Tourist Information Centre - Ease of finding	3.38	9
5	Transport on St. Mary's – Quality	3.04	18	**18**	Tourist Information Centre - Quality of service	3.38	9
6	Transport on St. Mary's – Range	2.88	24	**19**	Tourist Information Centre - Usefulness of information	3.43	8
7	Transport on St. Mary's – Value	2.94	21	**20**	Public toilets – availability	2.92	22
8	Food & drink – Quality	3.57	4	**21**	Public toilets – Cleanliness	3.30	13
9	Food & drink – Range	3.37	11	**22**	Signposting	3.16	15
10	Food & drink – Value	3.00	19	**23**	Maps/Information Boards	3.19	14
11	Food & drink - Availability/use of local produce	3.35	12	**24**	Cleanliness of Streets	3.59	3
12	Shops – Quality	3.06	17	**25**	General Atmosphere	3.81	1
13	Shops – Range	2.79	26	**26**	Sense of Welcome	3.71	2

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

The highest levels of satisfaction were for the general atmosphere (3.81) and sense of welcome (3.71). The lowest levels of satisfaction were with the range of shops and groceries (2.79 and 2.86 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 of shops, all aspects of grocery provision, the range and value of transport on St. Mary's and the availability of public toilets.



Ten visitor satisfaction scores increased compared with 2017, eleven remained level and just four scores decreased.

#	Indicator	2018	2017	#	Indicator	2018	2017
1	Accommodation – Facilities	3.48	3.5	14	Grocery provision – Quality	2.97	3.00
2	Accommodation – Quality	3.50	3.46	15	Grocery provision – Range	2.86	2.85
3	Accommodation – Service	3.57	3.50	16	Grocery provision - Availability of local produce	2.90	2.92
4	Accommodation – Value	3.11	3.07	17	Tourist Information Centre - Ease of finding	3.38	3.34
5	Transport on St. Mary's – Quality	3.04	3.24	18	Tourist Information Centre - Quality of service	3.38	3.37
6	*Transport on St. Mary's – Range	2.88	n/a	19	Tourist Information Centre - Usefulness of information	3.43	3.38
7	Transport on St. Mary's – Value	2.94	3.11	20	Public toilets – availability	2.92	3.03
8	Food & drink – Quality	3.57	3.29	21	Public toilets – Cleanliness	3.30	3.09
9	Food & drink – Range	3.37	3.14	22	Signposting	3.16	3.09
10	Food & drink – Value	3.00	2.95	23	Maps/Information Boards	3.19	3.13
11	Food & drink - Availability/use of local produce	3.35	3.18	24	Cleanliness of Streets	3.59	3.50
12	Shops – Quality	3.06	3.08	25	General Atmosphere	3.81	3.74
13	Shops – Range	2.79	2.86	26	Sense of Welcome	3.71	3.64

Score increased by more than + 0.05 compared with 2017

Score level or within +/- 0.05 compared with 2017

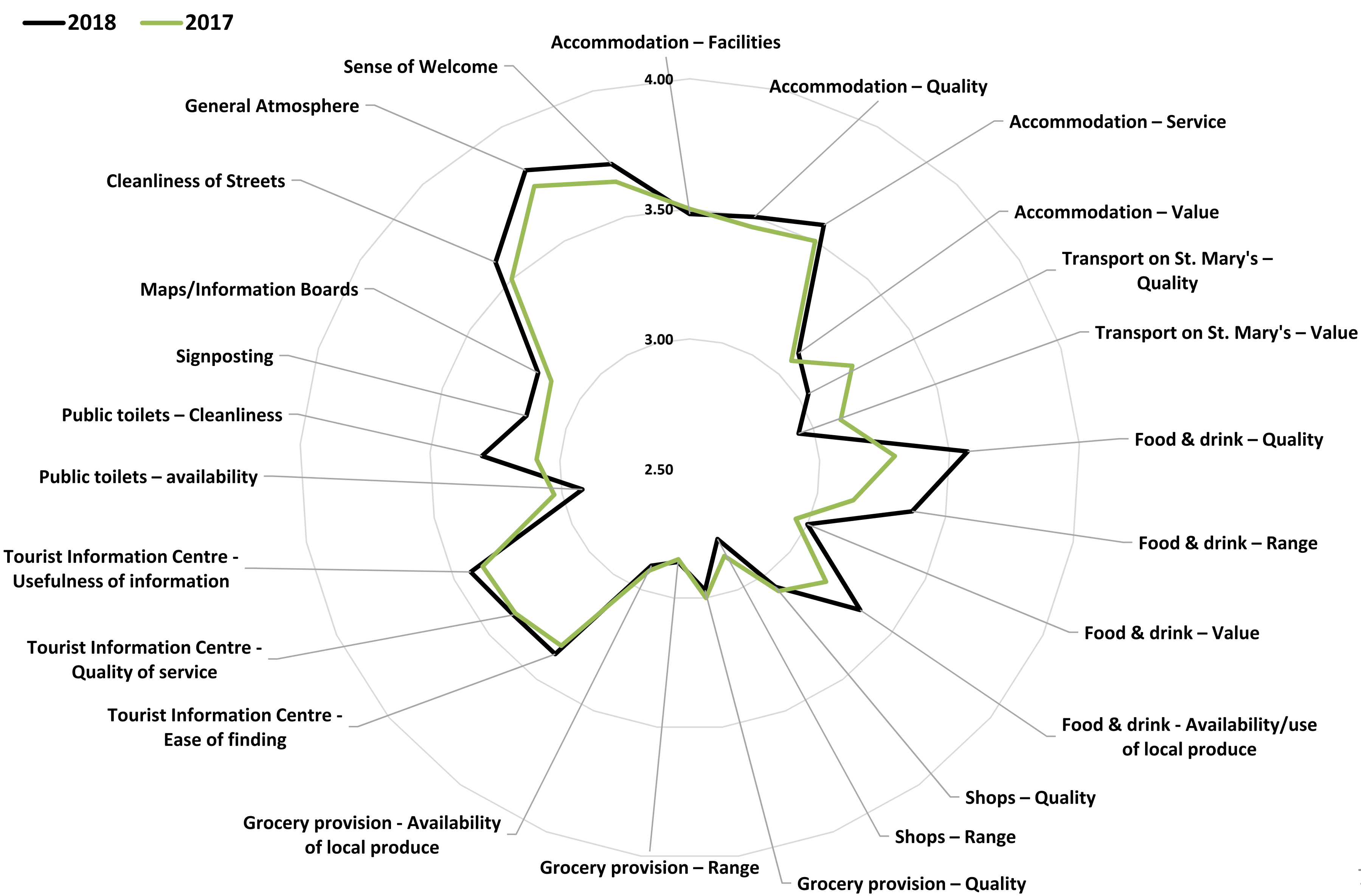
Score decreased by more than -0.05 compared with 2017

*** New indicator explored for the first time during 2018**

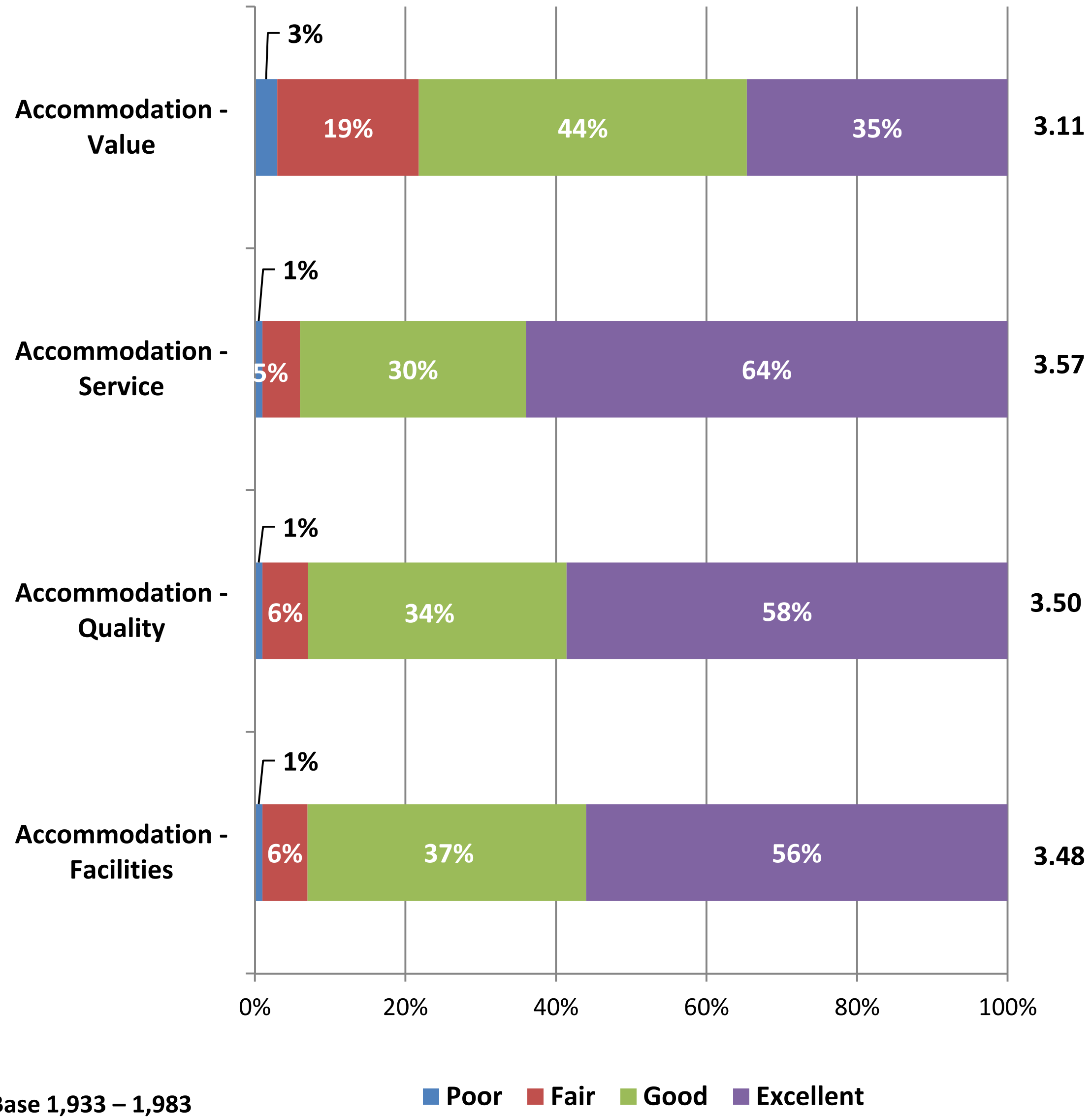
Scores increasing; Accommodation service, the quality, range and availability/use of local produce of food and drink, cleanliness of toilets and streets, signposting, maps/information boards, general atmosphere and sense of welcome.

Scores decreasing; Quality and value of transport on St. Mary’s, range of shops and availability of public toilets.

Scores increased for; Accommodation service, the quality, range and availability/use of local produce of food and drink, cleanliness of toilets and streets, signposting, maps/information boards, general atmosphere and sense of welcome. Scores decreased for; Quality and value of transport on St. Mary's, range of shops and availability of public toilets.



The mean satisfaction scores calculated for all aspects of accommodation on the Islands were high. Scores ranged from 3.11 for value to 3.57 for service.



Base 1,933 – 1,983

94% of visitors rated the service at their accommodation on the Islands as 'good' or 'excellent', as did 93% for the facilities at their accommodation, 92% for the quality of their accommodation and 79% 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 3.11 out of 4.00 for value to 3.57 for service (the fourth highest ranked indictor of all those explored during the 2018 survey).

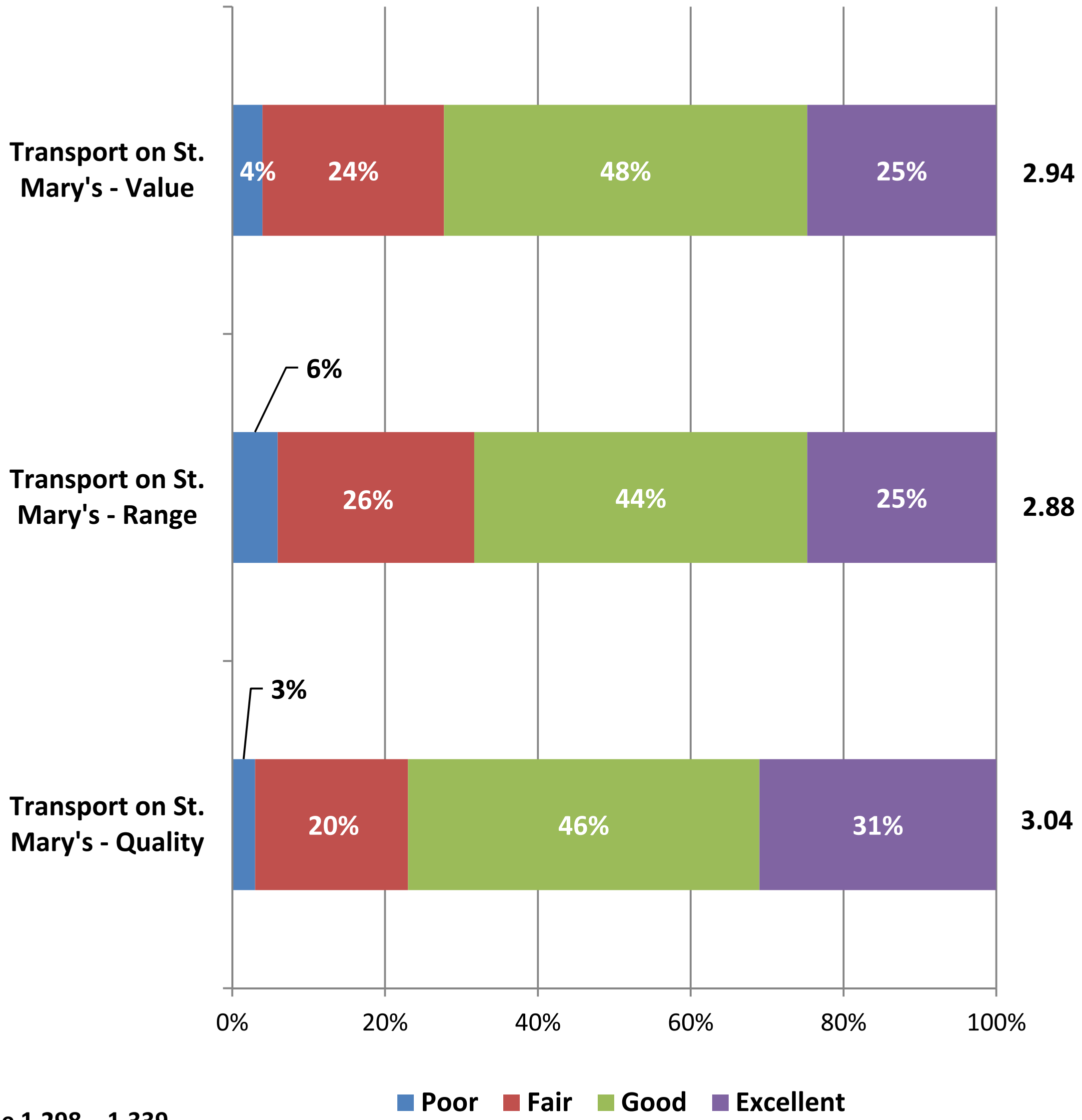
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for previous years.

On the whole, levels of satisfaction with the different aspects of accommodation were highest amongst January to March visitors, those on a first time visit, those on a main holiday, those staying on Tresco, those who had travelled by island helicopter and those staying 2-4 days on the Islands.

Accommodation - mean satisfaction scores (out of a max. of 4.00)	Facilities	Quality	Service	Value
JAN-MAR	3.68	3.66	3.73	3.41
APR-JUN	3.50	3.53	3.59	3.12
JUL-SEP	3.46	3.47	3.56	3.09
OCT-DEC	3.56	3.58	3.55	3.23
FIRST TIME	3.45	3.50	3.60	3.16
REPEAT	3.50	3.50	3.56	3.09
MAIN	3.50	3.51	3.60	3.16
SECOND	3.48	3.48	3.53	3.04
SHORT	3.42	3.48	3.57	3.09
ST MARY'S	3.45	3.46	3.54	3.12
ST AGNES	3.43	3.50	3.65	3.08
BRYHER	3.61	3.63	3.67	3.13
TRESCO	3.66	3.67	3.69	2.97
ST MARTIN'S	3.50	3.52	3.65	3.15
SKYBUS	3.52	3.53	3.61	3.10
SCILLONIAN	3.45	3.47	3.54	3.11
HELICOPTER	3.55	3.54	3.59	3.33
PRIVATE	3.25	3.40	3.35	3.24
CRUISE	3.40	3.40	3.40	3.40
OTHER TRANSPORT	3.54	3.53	3.59	3.10
2-4 DAYS	3.52	3.54	3.62	3.12
5-7 DAYS	3.46	3.49	3.54	3.10
8+ DAYS	3.51	3.52	3.62	3.14
2018	3.48	3.5	3.57	3.11
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 transport on St. Mary's show room for improvement.



Base 1,298 – 1,339

In terms of transport on St. Mary's, 77% of visitors rated the quality as 'good' or 'excellent' whilst 73% said the same in terms of value and 69% in terms of the range.

32% rated the range of transport as fair or poor, 28% stated the same for the value and 23% for quality.

Scores ranged from 2.88 for range to 3.04 for quality of service of transport on St. Mary's.

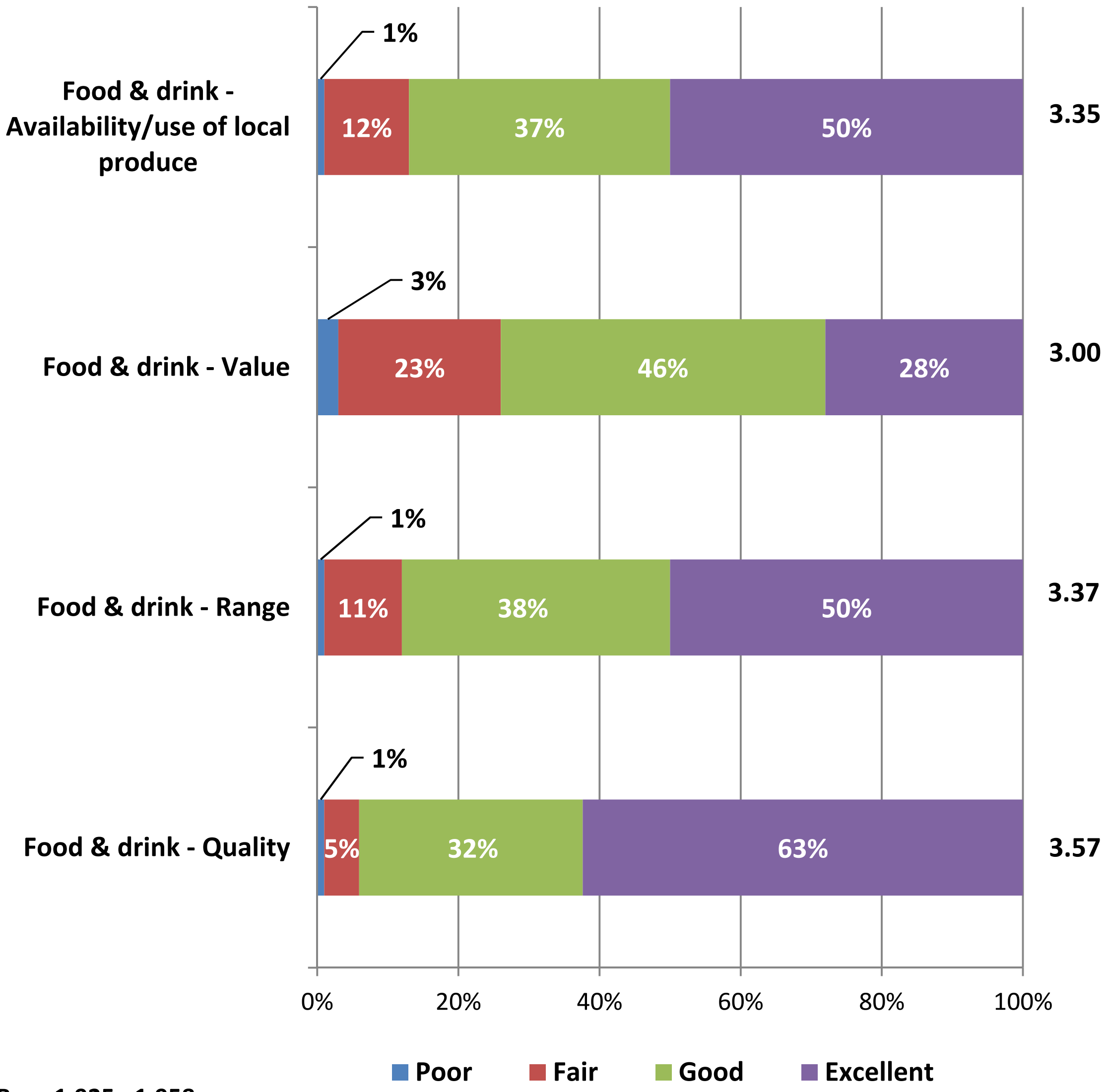
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for previous years, except for the range of transport which was asked for the first time in 2018.

On the whole, levels of satisfaction with the transport on St. Mary's were highest amongst staying visitors, those visiting during January to March, those visiting for the first time, those on a short break, those staying on Tresco, those who had travelled by island helicopter and those staying 2-4 days on the Islands.

Transport on St. Mary's - mean satisfaction scores (out of a max. of 4.00)	Quality	Range	Value
STAYING	3.05	2.87	2.95
DAY	2.93	2.88	2.86
JAN-MAR	3.33	2.96	3.30
APR-JUN	2.98	2.83	2.90
JUL-SEP	3.08	2.92	2.97
OCT-DEC	2.89	2.62	2.73
FIRST TIME	3.07	2.89	2.96
REPEAT	3.03	2.87	2.93
MAIN	3.08	2.89	2.97
SECOND	2.92	2.76	2.86
SHORT	3.16	3.02	3.02
ST MARY'S	3.02	2.85	2.94
ST AGNES	3.04	2.78	2.90
BRYHER	3.12	2.91	2.97
TRESCO	3.20	2.95	2.96
ST MARTIN'S	3.15	2.90	3.02
SKYBUS	3.12	2.91	3.00
SCILLONIAN	2.96	2.82	2.87
HELICOPTER	3.26	3.18	3.05
PRIVATE	2.79	2.76	2.83
CRUISE	2.64	2.75	3.14
OTHER TRANSPORT	3.04	2.83	2.98
2-4 DAYS	3.14	3.00	2.99
5-7 DAYS	3.05	2.88	2.94
8+ DAYS	3.02	2.82	2.94
2018	3.04	2.88	2.94
2017	3.24	n/a	3.11
2016	3.14	n/a	3.04

Analysis segment ranking the individual factor the highest

The mean satisfaction scores calculated for all aspects of food & drink on the Islands were high.



Base 1,925– 1,958

95% of visitors rated the quality of the food & drink on the Islands as 'good' or 'excellent', as did 88% for the range, 74% for value and 87% for the availability/use of local produce.

23% of visitors rated the value of the food & drink on the Islands as 'fair' and 3% as 'poor'.

The mean satisfaction scores calculated for all aspects of food & drink on the Islands were high, ranging from 3.00 out of 4.00 for the value of food & drink to 3.57 for the quality of the food & drink.

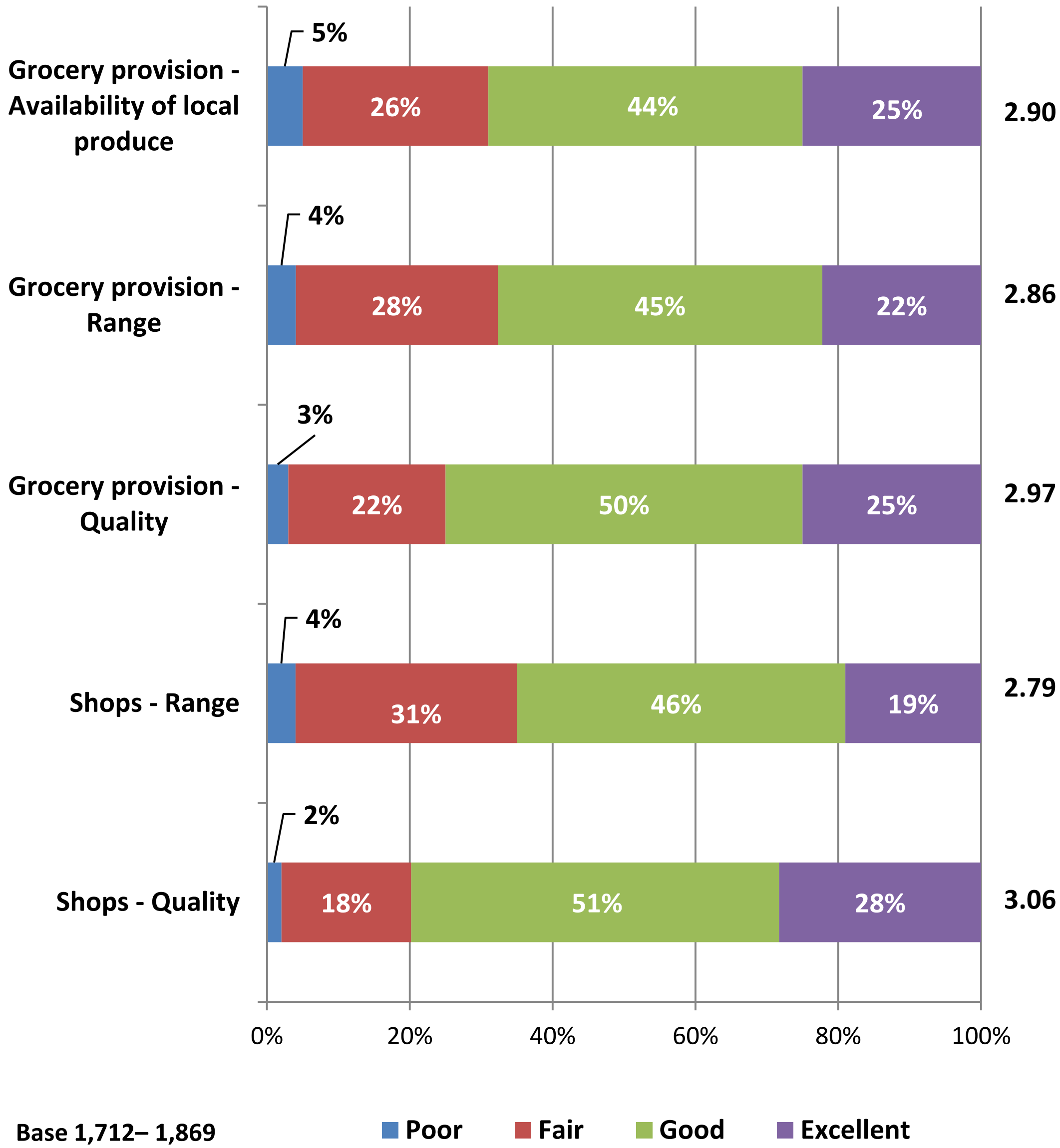
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for previous years where available.

Broadly speaking, levels of satisfaction with the food & drink on the Islands were highest amongst staying visitors, January to March visitors, those on their main holiday of the year, those staying on Tresco, those arriving by Skybus and those staying 7 days or less.

Food & drink - mean satisfaction scores (out of a max. of 4.00)	Quality	Range	Value	Availability/use of local produce
STAYING	3.58	3.37	3.00	3.35
DAY	3.40	3.31	2.97	3.33
JAN-MAR	3.68	3.55	3.16	3.28
APR-JUN	3.57	3.38	3.02	3.34
JUL-SEP	3.57	3.36	2.99	3.37
OCT-DEC	3.54	3.17	2.87	3.30
FIRST TIME	3.57	3.37	3.06	3.34
REPEAT	3.57	3.36	2.97	3.35
MAIN	3.61	3.39	3.03	3.39
SECOND	3.52	3.32	2.91	3.30
SHORT	3.56	3.37	3.01	3.29
ST MARY'S	3.56	3.36	3.01	3.31
ST AGNES	3.66	3.31	3.02	3.46
BRYHER	3.67	3.46	3.02	3.54
TRESCO	3.63	3.39	2.88	3.41
ST MARTIN'S	3.60	3.35	3.01	3.44
SKYBUS	3.59	3.38	3.02	3.35
SCILLONIAN	3.56	3.37	2.98	3.36
HELICOPTER	3.55	3.34	3.02	3.33
PRIVATE	3.55	3.31	3.07	3.39
CRUISE	3.47	3.29	3.12	3.31
OTHER TRANSPORT	3.53	3.28	2.90	3.24
2-4 DAYS	3.56	3.36	3.10	3.38
5-7 DAYS	3.59	3.37	3.00	3.35
8+ DAYS	3.56	3.36	2.94	3.34
2018	3.57	3.37	3	3.35
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 mean satisfaction scores calculated for all aspects of shopping were amongst the lowest of all the indicator scores.



Base 1,712– 1,869

79% of visitors rated the quality of shops on the Islands as 'good' or 'excellent', as did 65% for the range of shops. 75% rated the quality of the grocery provision as 'good' or 'excellent' as did 67% for the range of the grocery provision and 69% for the availability of local produce.

31% of visitors rated the range of shops as 'fair' as did 28% for the range of grocery provision and 26% for the availability of local produce. 22% of visitors rated the quality of the shops as 'fair', as did 22% for the quality of the grocery provision.

The mean satisfaction scores calculated for all aspects of shopping on the Islands were fair to good and ranged from 2.79 out of 4.00 for the range of shops to 3.06 for the quality of the shops.

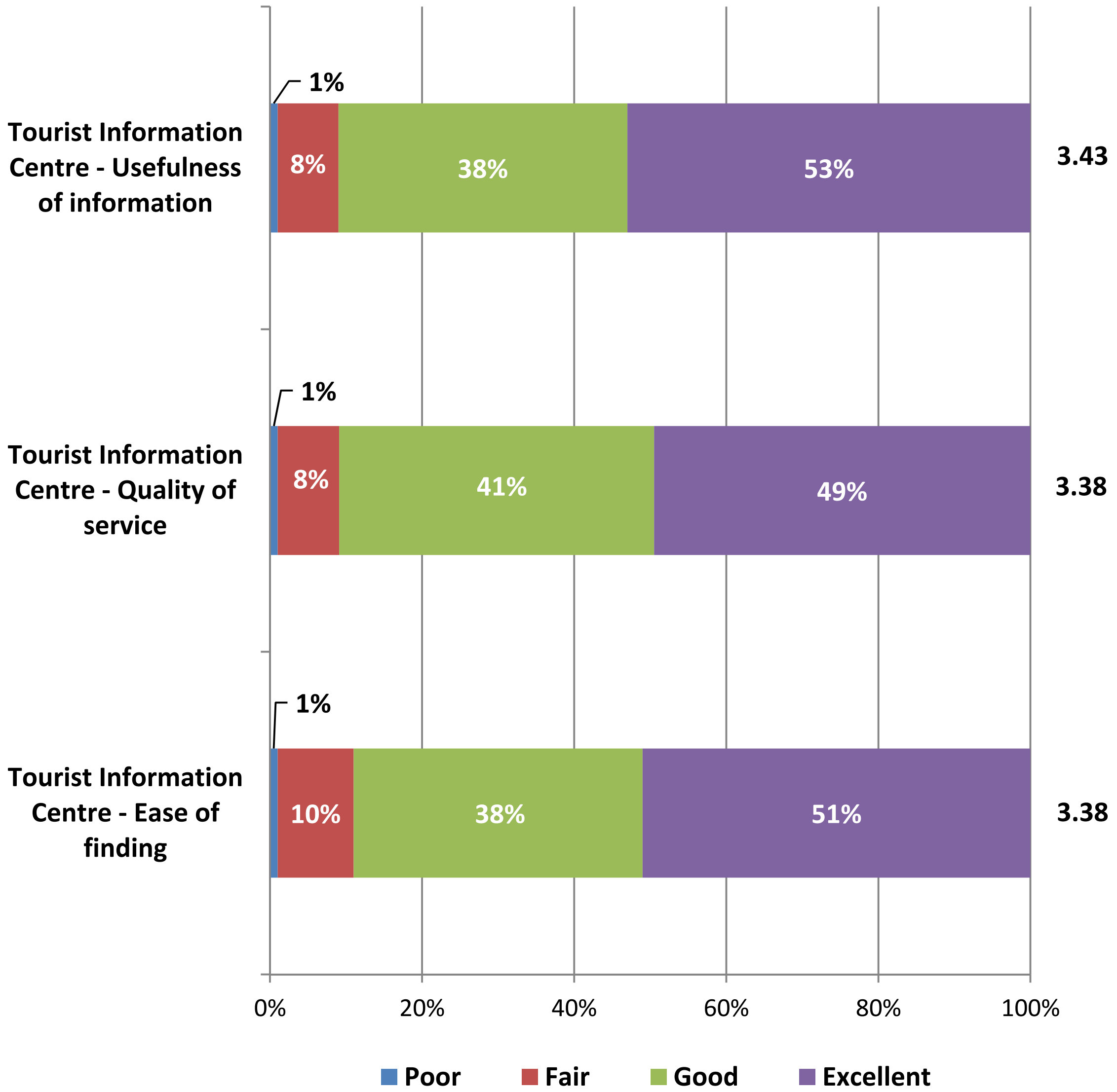
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for previous years where available.

Levels of satisfaction with shopping provision on the Islands were mixed across some of the analysis groups but were highest amongst first time visitors, those on their main holiday, those staying on Bryher or Tresco, those who had travelled by island helicopter and those spending 2-4 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	3.06	2.79	2.98	2.86	2.89
DAY	2.96	2.85	2.93	2.86	2.96
JAN-MAR	3.05	2.82	3.09	2.97	2.85
APR-JUN	3.08	2.81	2.96	2.83	2.85
JUL-SEP	3.04	2.77	2.98	2.87	2.93
OCT-DEC	2.99	2.84	2.90	2.83	2.87
FIRST TIME	3.06	2.81	2.99	2.86	2.93
REPEAT	3.05	2.79	2.97	2.85	2.89
MAIN	3.10	2.80	2.99	2.87	2.93
SECOND	3.01	2.76	2.95	2.83	2.81
SHORT	3.00	2.81	2.93	2.86	2.89
ST MARY'S	3.04	2.79	2.94	2.82	2.83
ST AGNES	3.12	2.63	3.04	2.83	3.05
BRYHER	3.16	2.87	3.13	3.02	3.21
TRESCO	3.14	2.85	3.14	3.03	2.98
ST MARTIN'S	2.95	2.69	2.94	2.84	3.04
SKYBUS	3.05	2.78	2.94	2.81	2.85
SCILLONIAN	3.07	2.81	3.00	2.88	2.93
HELICOPTER	3.11	2.87	3.04	3.00	3.11
PRIVATE	2.93	2.79	3.03	3.03	2.90
CRUISE	2.77	2.50	2.89	2.78	2.75
OTHER TRANSPORT	3.03	2.71	2.96	2.81	2.82
2-4 DAYS	3.10	2.91	3.01	2.94	3.03
5-7 DAYS	3.07	2.79	3.01	2.87	2.89
8+ DAYS	3.02	2.74	2.89	2.79	2.84
2018	3.06	2.79	2.97	2.86	2.9
2017	3.08	2.86	3.00	2.85	2.92
2016	2.84	3.00	2.86	2.96	n/a

Analysis segment ranking the individual factor the highest

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



Base 1,612 – 1,674

In terms of the Tourist Information Centre (TIC), 89% rated the ease of finding it as 'good' or 'excellent', 90% rated it the same in terms of quality of service and 91% for 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 2018. Scores ranged from 3.38 out of 4.00 for the ease of finding and the quality of service to 3.43 for the usefulness of the information received at the TIC.

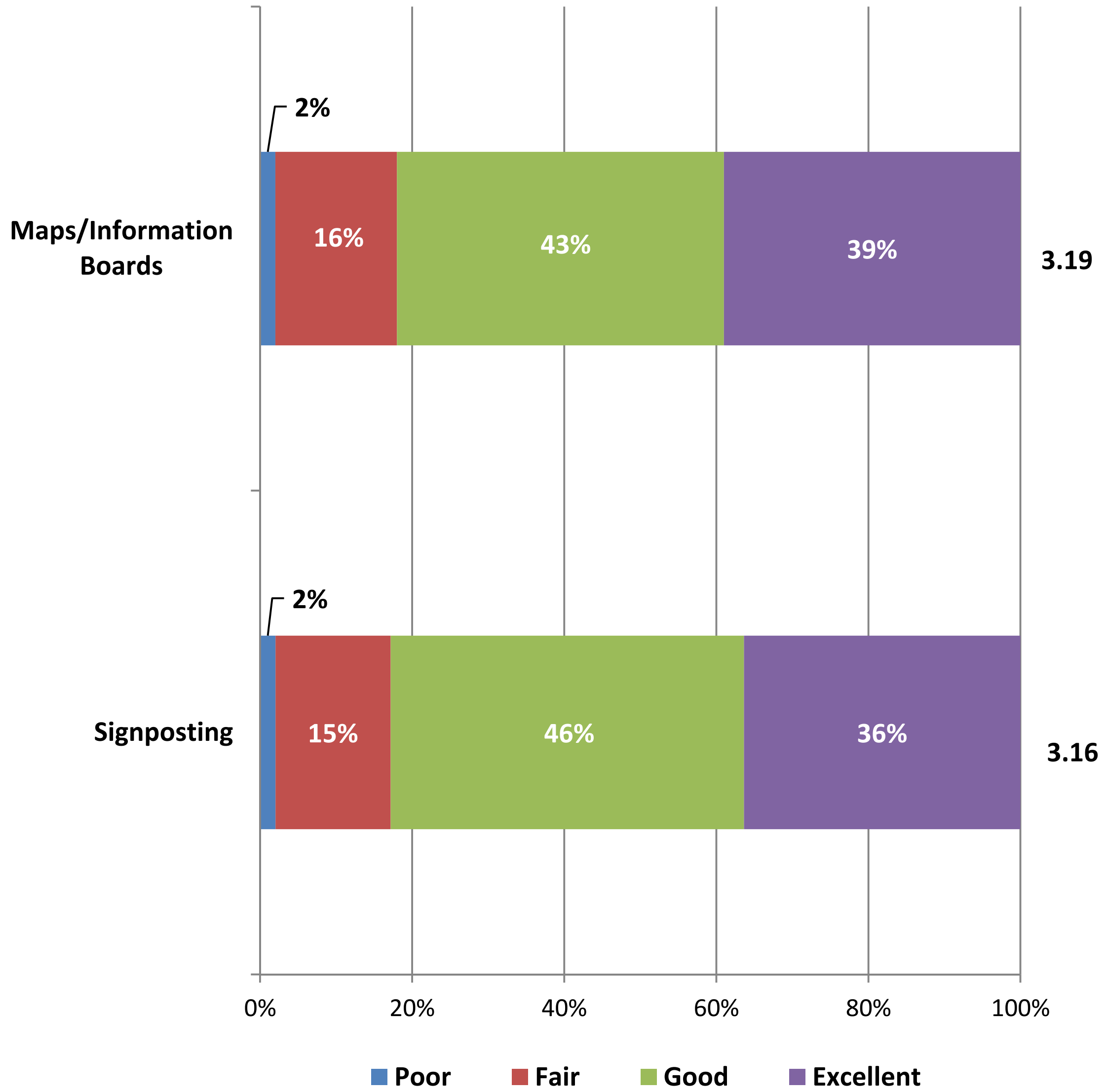
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for previous years.

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. Mary's 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	3.39	3.39	3.45
DAY	3.31	3.28	3.28
JAN-MAR	3.35	3.20	3.29
APR-JUN	3.33	3.34	3.41
JUL-SEP	3.42	3.41	3.45
OCT-DEC	3.29	3.27	3.36
FIRST TIME	3.33	3.36	3.42
REPEAT	3.40	3.39	3.44
MAIN	3.44	3.46	3.51
SECOND	3.29	3.27	3.33
SHORT	3.33	3.31	3.41
ST MARY'S	3.41	3.40	3.46
ST AGNES	3.36	3.21	3.32
BRYHER	3.33	3.34	3.46
TRESCO	3.28	3.40	3.43
ST MARTIN'S	3.24	3.32	3.24
SKYBUS	3.40	3.42	3.46
SCILLONIAN	3.36	3.35	3.41
HELICOPTER	3.38	3.30	3.40
PRIVATE	3.23	3.33	3.29
CRUISE	3.36	3.43	3.36
OTHER TRANSPORT	3.39	3.43	3.49
2-4 DAYS	3.37	3.36	3.43
5-7 DAYS	3.36	3.36	3.42
8+ DAYS	3.45	3.45	3.51
2018	3.38	3.38	3.43
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 1,817 – 1,849

82% of visitors rated both the signposting and the maps/information boards on the Islands as 'good' or 'excellent'. The maps/information boards on the Islands were rated as 'fair' by 16% of and the signposting was rated the same by 15% of visitors.

The mean satisfaction scores calculated for both aspects of the ease of finding your way around were good. Scores ranged from 3.16 out of 4.00 for signposting to 3.19 for the maps/information boards.

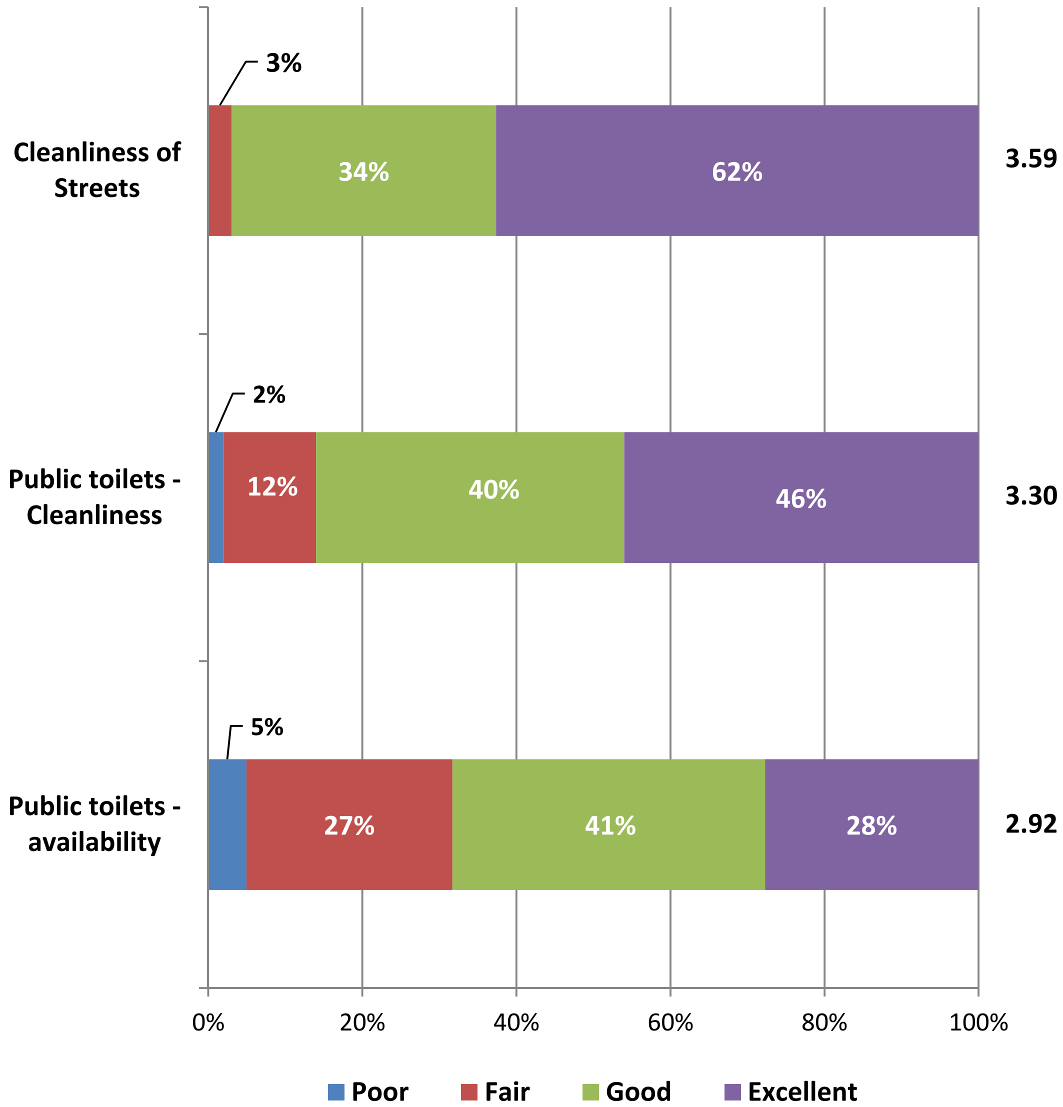
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for previous years.

On the whole, levels of satisfaction with the ease of finding way around were highest amongst day visitors, July to September visitors, repeat visitors, those on their main holiday of the year, those staying on St Agnes and Tresco and those staying 8+ days.

Ease of finding way around - mean satisfaction scores (out of a max. of 4.00)	Signposting	Maps/ Information Boards
STAYING	3.15	3.19
DAY	3.24	3.22
JAN-MAR	3.15	3.09
APR-JUN	3.16	3.18
JUL-SEP	3.18	3.20
OCT-DEC	2.99	3.15
FIRST TIME	3.11	3.11
REPEAT	3.18	3.22
MAIN	3.19	3.24
SECOND	3.09	3.11
SHORT	3.14	3.13
ST MARY'S	3.16	3.20
ST AGNES	3.12	3.29
BRYHER	3.11	3.17
TRESCO	3.23	3.18
ST MARTIN'S	3.19	3.18
SKYBUS	3.19	3.22
SCILLONIAN	3.12	3.15
HELICOPTER	3.24	3.23
PRIVATE	3.27	3.26
CRUISE	3.25	3.31
OTHER TRANSPORT	3.21	3.20
2-4 DAYS	3.14	3.16
5-7 DAYS	3.13	3.18
8+ DAYS	3.21	3.22
2018	3.16	3.19
2017	3.09	3.13
2016	3.00	3.08

Analysis segment ranking the individual factor the highest

Cleanliness of the streets and public toilets received good scores of 3.59 and 3.3 respectively. The availability of public toilets was rated lower at 2.92 out of a maximum of 4.00.



Base 1,757 – 1,957

69% of visitors rated the availability of the public toilets on the Islands as 'good' or 'excellent' compared with 86% who said the same for their cleanliness. 96% of visitors rated the cleanliness of the streets as 'good' or 'excellent'.

27% of visitors rated the availability of the public toilets as 'fair', compared with 12% who said the same in terms of their cleanliness.

The mean satisfaction scores for the cleanliness of the public toilets (3.30) and the cleanliness of the streets on the Islands (3.59) were good. The availability of public toilets received a slightly lower score of 2.92.

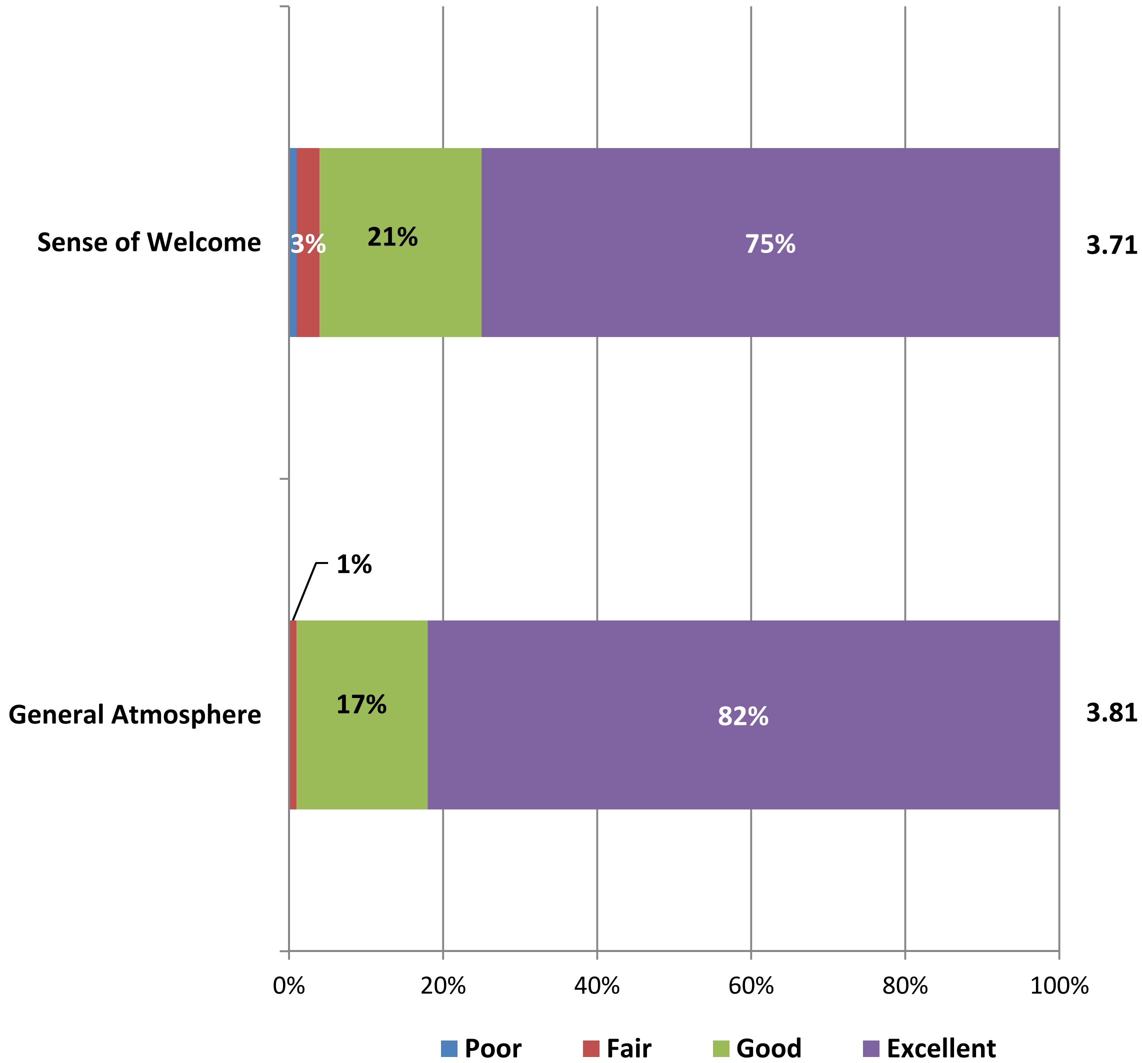
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for previous years.

On the whole, levels of satisfaction with public toilets and cleanliness of the streets were highest amongst day visitors, January to March visitors, first time visitors, those on a short break, those staying on St. Agnes, those arriving on cruise ships and those staying for 2-4 days.

Public toilets/cleanliness of the streets - mean satisfaction scores (out of a max. of 4.00)	Public Toilets – Availability	Public Toilets - Cleanliness	Cleanliness of the Streets
STAYING	2.90	3.29	3.59
DAY	3.21	3.47	3.60
JAN-MAR	3.09	3.42	3.54
APR-JUN	2.82	3.29	3.58
JUL-SEP	2.98	3.30	3.60
OCT-DEC	2.72	3.24	3.55
FIRST TIME	3.01	3.41	3.65
REPEAT	2.88	3.26	3.57
MAIN	2.91	3.29	3.61
SECOND	2.83	3.23	3.52
SHORT	3.00	3.38	3.62
ST MARY'S	2.90	3.30	3.59
ST AGNES	2.95	3.44	3.58
BRYHER	2.86	3.23	3.53
TRESCO	2.85	3.30	3.58
ST MARTIN'S	2.91	3.29	3.57
SKYBUS	2.83	3.25	3.57
SCILLONIAN	3.00	3.34	3.62
HELICOPTER	2.90	3.23	3.65
PRIVATE	2.89	3.37	3.38
CRUISE	3.33	3.58	3.65
OTHER TRANSPORT	2.85	3.30	3.54
2-4 DAYS	3.01	3.39	3.68
5-7 DAYS	2.91	3.29	3.59
8+ DAYS	2.84	3.24	3.53
2018	2.92	3.3	3.59
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 2018 survey.



Base 1,960– 1,949

99% 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 3% of visitors rated the sense of welcome as 'fair', compared with 1% of visitors doing so for the general atmosphere.

At 3.81 out of 4.00 for the general atmosphere and 3.71 for the sense of welcome on the Islands, these were the two highest ranked indicators amongst visitors explored by the 2018 survey.

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

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, repeat visitors, those on their main holiday of the year, those arriving by other transport and those staying for 2-4 days.

General atmosphere and sense of welcome- mean satisfaction scores (out of a max. of 4.00)	General atmosphere	Sense of welcome
STAYING	3.81	3.72
DAY	3.76	3.59
JAN-MAR	3.88	3.89
APR-JUN	3.81	3.72
JUL-SEP	3.81	3.70
OCT-DEC	3.76	3.61
FIRST TIME	3.79	3.69
REPEAT	3.82	3.72
MAIN	3.84	3.75
SECOND	3.78	3.68
SHORT	3.80	3.68
ST MARY'S	3.81	3.71
ST AGNES	3.80	3.74
BRYHER	3.79	3.76
TRESCO	3.83	3.69
ST MARTIN'S	3.79	3.70
SKYBUS	3.81	3.73
SCILLONIAN	3.81	3.69
HELICOPTER	3.80	3.73
PRIVATE	3.72	3.66
CRUISE	3.80	3.61
OTHER TRANSPORT	3.82	3.75
2-4 DAYS	3.85	3.75
5-7 DAYS	3.80	3.72
8+ DAYS	3.82	3.70
2018	3.81	3.71
2017	3.74	3.64
2016	3.72	3.61

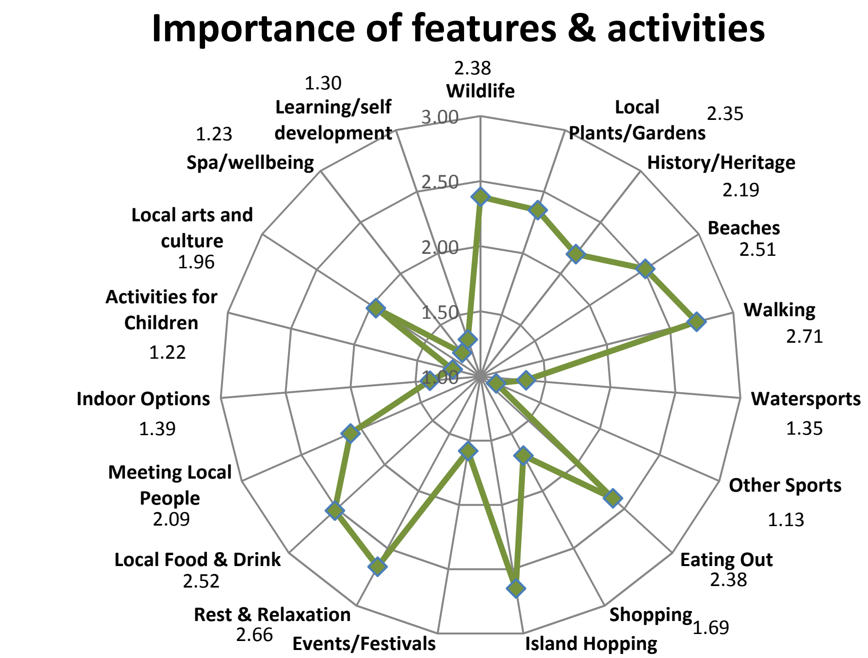
Analysis segment ranking the individual factor the highest

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.

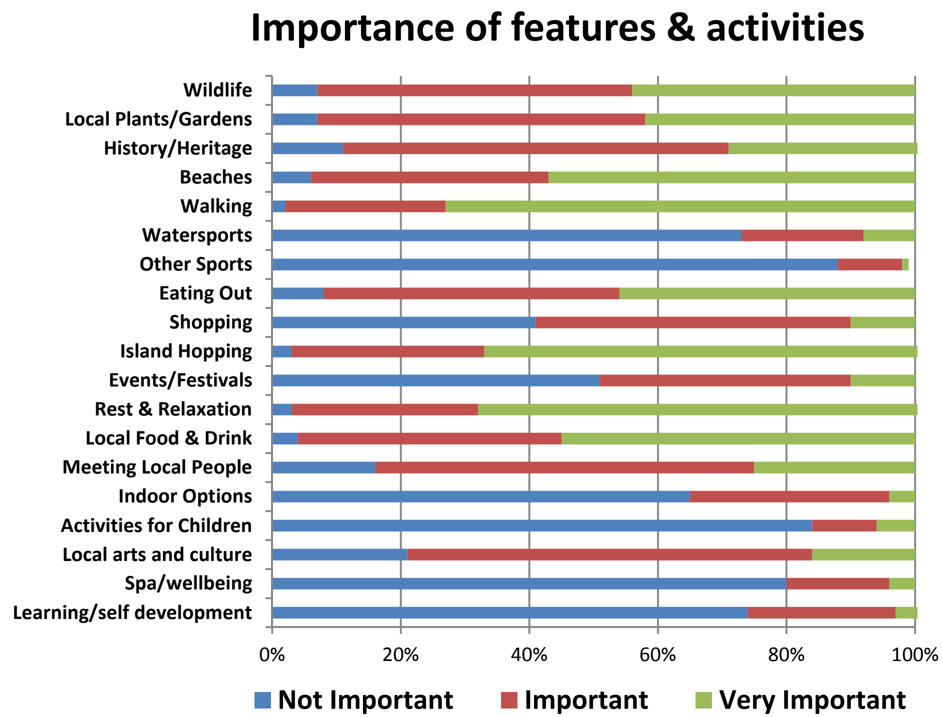
Visitors were asked to consider a number of features and activities that can be enjoyed during a visit to the Isles of Scilly and asked to rate them in terms of importance to them on a 1 to 3 scale where '1' was 'not important' and '3' was 'very important'. This then allowed an average importance score 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 2.71 and 2.66 out of 3.00 respectively. These were closely followed by island-hopping (2.65), local food & drink (2.52), beaches (2.51), eating out and wildlife (2.38 in each case).

Those features/activities considered of lower importance amongst visitors were other sports (1.13), spa/wellbeing & activities for children (1.23 and 1.22 respectively), learning & self development (1.30), water sports (1.35), indoor options (1.39), events/festivals (1.58), shopping (1.69) and local arts and culture (1.96).



Base 1,901 – 1,959



The features and activities on the Islands which the largest proportion of visitors considered to be very important were walking, rest & relaxation, island hopping, local food & drink and beaches.

Importance of features & activities	Not Important	Important	Very Important
Walking	2%	25%	73%
Rest & Relaxation	3%	29%	69%
Island Hopping	3%	30%	68%
Local Food & Drink	4%	41%	55%
Beaches	6%	37%	57%
Wildlife	7%	49%	44%
Local Plants/Gardens	7%	51%	42%
Eating Out	8%	46%	46%
History/Heritage	11%	60%	30%
Meeting Local People	16%	59%	25%
Local arts and culture	21%	63%	16%
Shopping	41%	49%	10%
Events/Festivals	51%	39%	10%
Indoor Options	65%	31%	4%
Watersports	73%	19%	8%
Learning/self development	74%	23%	4%
Spa/wellbeing	80%	16%	4%
Activities for Children	84%	10%	6%
Other Sports	88%	10%	1%

Base 1,901 – 1,959

94% of respondents stated that there were not any specific activities that didn't live up to expectations in terms of quality or value for money.

Respondents were asked for the first time during the 2018 survey if there were any specific activities that didn't live up to expectations in terms of quality or value for money and the main responses are summarised in the table and Word Cloud below. 94% of respondents stated that there were not any specific activities that didn't live up to expectations in terms of quality or value for money. The remaining 6% provided a wide and varied range of responses provided and the full list should be examined to gain a full understanding of this area.

Most comments were specific to a particular experience and not many general themes were evident in the comments with the exception of cost related issues (18%), issues related to food and eating out (11%) and the frequency/availability of boats travelling between the islands.

	Count	%
Cost of activities	25	**18%**
Eating out/food quality/cost/availability	16	**11%**
Inter island boat frequencies	11	**8%**

A cinema and swimming pool were the most cited activities that people would like to see.

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.

Only two areas were mentioned by more than 5% of respondents that answered this question (339 respondents in total) which were a cinema (7%) and a swimming pool/better/indoor pool (6%).

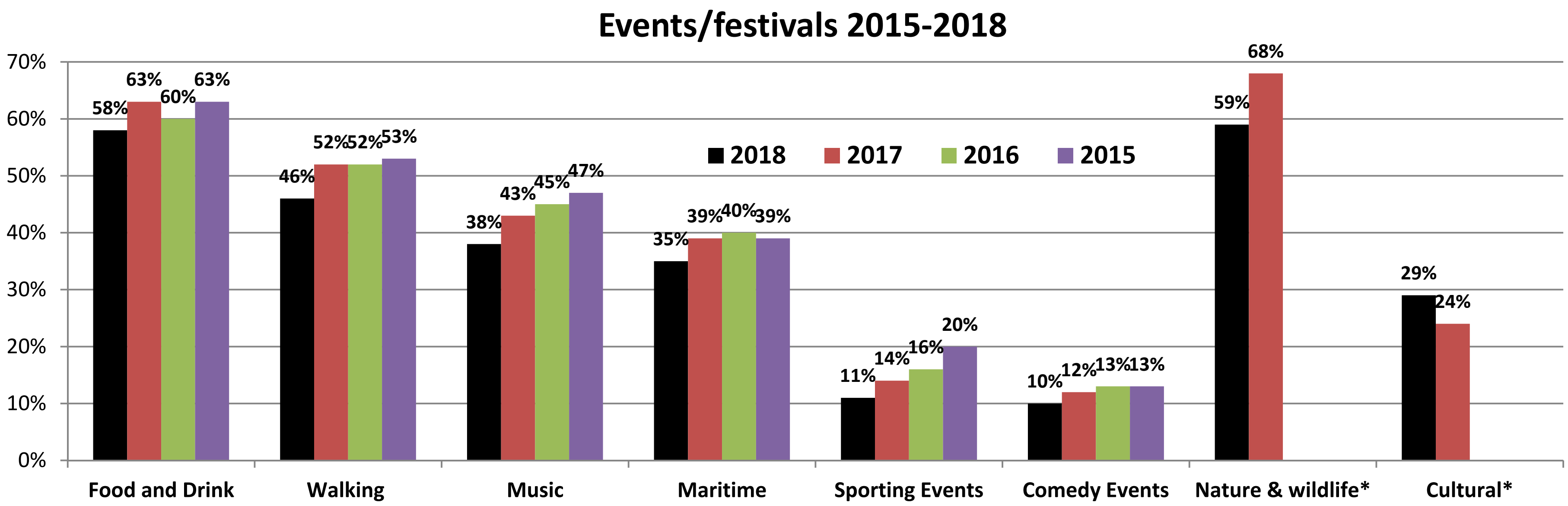
	Count	%
Cinema	25	**7%**
Swimming pool	19	**6%**

59% of visitors said nature & wildlife events would encourage them to visit with food & drink (58%), walking festivals (46%), music events (38%), maritime festivals (35%) and cultural events (29%) the next most popular.

Respondents were also asked what types of events would encourage them to visit the Isles of Scilly. 28% 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 59% said nature & wildlife events/festivals would encourage them to visit, 58% food & drink festivals, 46% walking festivals, 38% music events, 35% maritime festivals and 29% cultural events the next most popular. The least popular were comedy events (10%) and sporting events (11%). All types of events/festivals were selected by slightly lower proportions than in previous years with the exception of cultural events. There was little variation in the results by analysis segment.

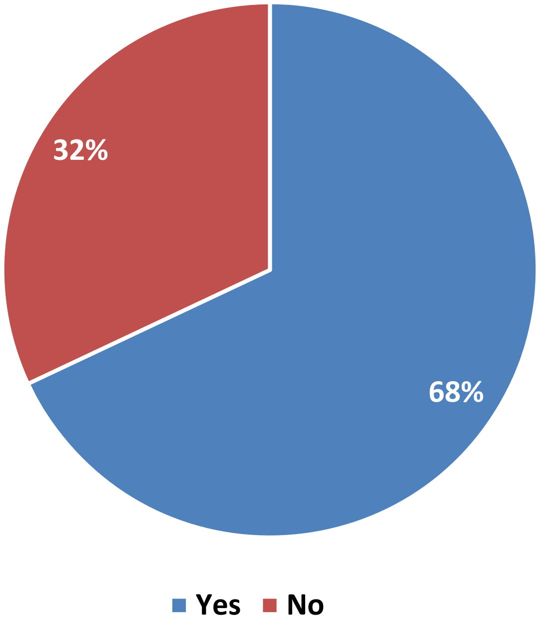
A number of respondents provided an 'other' type of event/festival which would encourage them to visit the Islands and these can be found in the appendices which accompany this report.



Base 1,426. *Explored for the first time during the 2017 survey.

Approximately 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)?



68% of respondents said they would consider taking a winter break on the Isles of Scilly, a broadly similar percentage as in previous surveys.

There was little meaningful variation across the analysis segments.

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.

Whether would consider a winter break on the Isles of Scilly (Nov-Mar)?	Yes	No
2018	**68%**	**32%**
2017	66%	34%
2016	68%	32%
2015	69%	31%
2014	71%	29%

Base 1,984

Respondents were asked what would encourage them to visit the Islands during the winter (Nov-March). Cost and reliable/available transport are the main barriers to visiting at this time of the year.

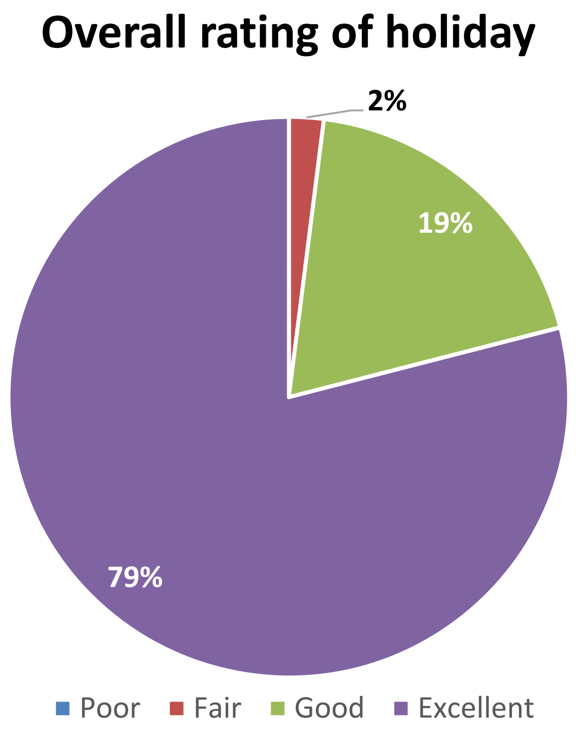
Respondents were asked what would encourage them to visit the Islands during the winter (Nov-March) and the main responses are summarised in the table and Word Cloud below. There was a wide and varied range of responses provided and the full list should be examined to gain a full understanding of this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

Many mentioned the cost/lower prices/offers (32%), the availability of transport to get to the Islands (26%), the weather (14%), the availability of accommodation (12%), a calm sea crossing/improved boat (8%) and facilities on the island being open (6%).

	Count	%
Cost/lower prices/offers	327	**32%**
Available/reliable transport/Scillonian/flights	271	**26%**
Weather	145	**14%**
Availability of accommodation	124	**12%**
Calm sea crossing	83	**8%**
Facilities being open	62	**6%**

79% of visitors rated their holiday as 'excellent' and a further 19% as 'good'.

The average mean score for their holiday overall was calculated at 3.76 out of 4.00.



Overall rating of holiday	Poor	Fair	Good	Excellent
2018	**-**	**2%**	**19%**	**79%**
2017	1%	2%	21%	76%
2016	-	1%	18%	80%
2015	1%	2%	20%	77%

Base 1,856

79% of visitors rated their holiday to the Islands as 'excellent' and a further 19% as 'good'. These proportions have been relatively consistent across the survey years with a 4% range between all 'excellent' scores and a 3% range between all 'good' scores.

Only 2% of visitors rated their holiday as 'fair' and none rated it as 'poor'. Again there has been little variation in these proportions across the survey years.

The average mean score for their holiday overall was calculated at 3.76 out of 4.00 (3.73 – 2017, 3.79 – 2016, 3.74 - 2015).

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

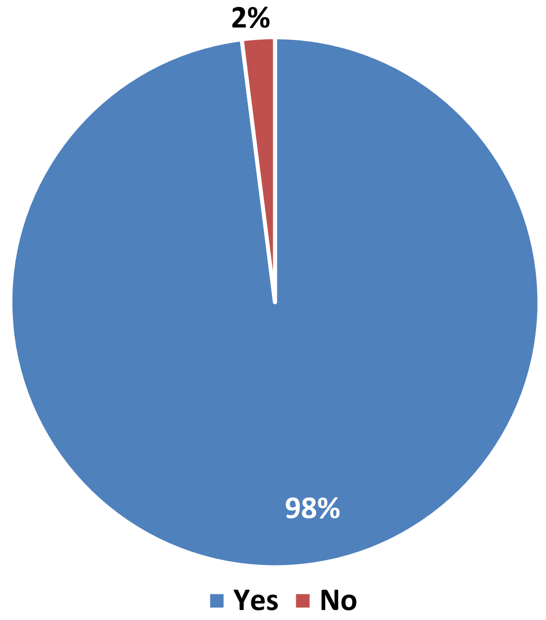
The overall rating of their holiday to the Islands was highest amongst staying visitors, January to March visitors, repeat visitors, those on their main holiday of the year, those staying on St. Martins, those arriving by other transport and those staying for 8+ days on the Islands.

Overall rating of holiday - mean satisfaction scores (out of a max. of 4.00)	
STAYING	3.78
DAY	3.52
JAN-MAR	3.85
APR-JUN	3.77
JUL-SEP	3.76
OCT-DEC	3.73
FIRST TIME	3.73
REPEAT	3.78
MAIN	3.83
SECOND	3.73
SHORT	3.68
ST MARY'S	3.77
ST AGNES	3.8
BRYHER	3.81
TRESCO	3.77
ST MARTIN'S	3.82
SKYBUS	3.77
SCILLONIAN	3.76
HELICOPTER	3.75
PRIVATE	3.63
CRUISE	3.50
OTHER TRANSPORT	3.81
2-4 DAYS	3.71
5-7 DAYS	3.77
8+ DAYS	3.83

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



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, the same or similar proportion to previous years.

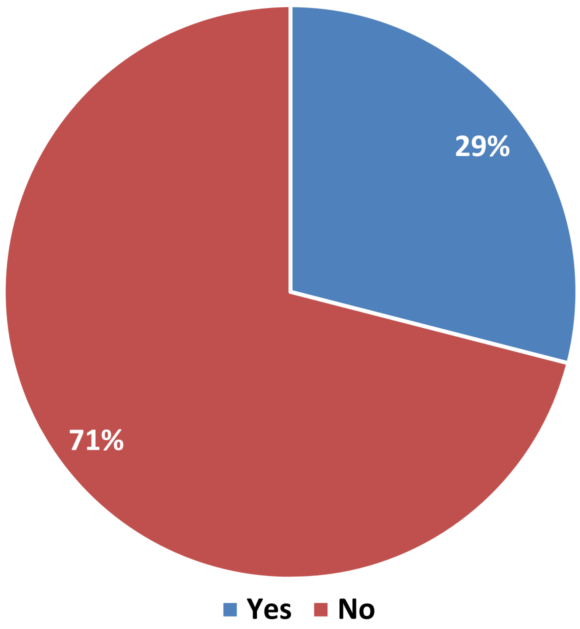
There was little meaningful variation in the results by analysis segment.

Whether would recommend the Isles of Scilly as a holiday destination	Yes	No
2018	**98%**	**2%**
2017	98%	2%
2016	99%	1%
2015	98%	2%

Base 1,856

29% 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



Respondents were asked whether they would make any improvements to the Isles of Scilly as a holiday destination.

29% of respondents said they would do so whilst 71% said it was fine as it is.

There was little meaningful variation in the results by analysis segment.

Base 1,854

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 transport/facilities and reliability, lower prices and general costs associated with a visit and better accommodation.

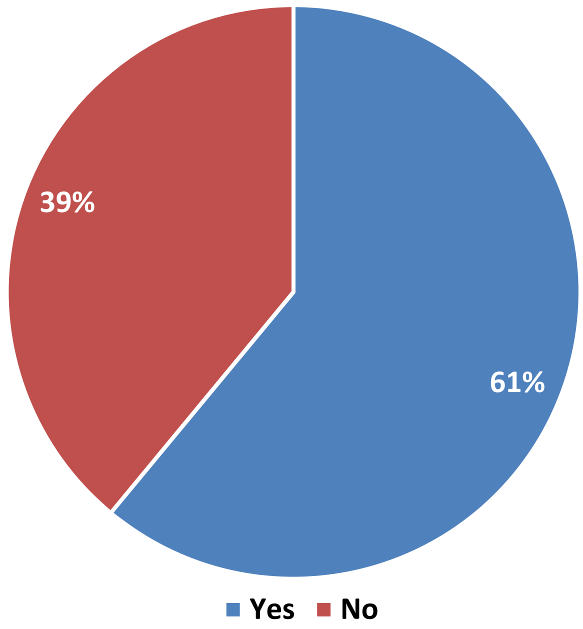
Respondents were asked what, if anything, they thought the Isles of Scilly could do to improve upon the experience it offers visitors and the main responses are summarised in the table and Word Cloud below. There was a wide and varied range of responses provided and the full list should be examined to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

Many mentioned the need for improved transport/facilities and reliability (17%), lower prices and general costs associated with a visit (10%) and better accommodation (7%).

	Count	%
Improved transport, facilities and reliability	179	**17%**
Cost/lower prices/offers	103	**10%**
Improved accommodation	70	**7%**
Fewer cars/vehicles	45	**4%**
Evening activities/events/festivals	44	**4%**
Better shops	33	**3%**
Food/eating out	31	**3%**
Improved information/signage	28	**3%**
Friendlier locals/boatmen/residents	21	**2%**

61% of visitors said they would be willing to support a local Isles of Scilly environment fund.

Whether willing to support a local Isles of Scilly environment fund



For the first time during the 2018 survey, respondents were asked to reflect on their visit and enjoyment of the Islands and asked whether they would be willing to support a local Isles of Scilly environment fund which would help with measures to reduce the impact of visitors on the fragile natural environment.

61% of respondents said they would do so whilst 39% said they would not.

Previous visitors (64%) were more willing to support a fund than first time visitors (53%).

Base 1,854

Visitor Expenditure

Average visitor spend per person per day on the Islands (excluding accommodation) was £43.62. Staying visitors spent an average of £45.64 per person per night on their accommodation.

Average visitor spend per person per day on the Islands (excluding accommodation) was £43.62 (£41.16 in 2017, £41.51 in 2016, £49.30 in 2015 and £44.88 in 2014) ranging from £42.91 for staying visitors to £46.69 for those visiting the Islands for the day.

In addition, staying visitors spent an average of £45.64 per person per night on their accommodation on the Isles of Scilly (£44.51 in 2017, £41.34 in 2016, £46.11 in 2015 and £38.65 in 2014).

VISITOR SPEND BY CATEGORY 2018 (£/per person/per day)

	Accommodation (staying visitors only)	Meals/ snacks	Tourist shopping	Transport	Activities	Other	TOTAL	TOTAL (EXCLUDING ACCOMMODATION)
ALL 2018	**£45.64**	**£17.66**	**£8.54**	**£8.15**	**£5.34**	**£3.93**	**£89.26**	**£43.62**
STAYING	£45.64	£17.70	£8.34	£8.11	£5.34	£3.42	£88.55	£42.91
DAY	-	£17.02	£12.34	£8.99	£5.36	£2.99	£46.69	£46.69
ALL 2017	£44.51	£16.73	£8.87	£7.54	£5.53	£2.49	£85.67	£41.16
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 2018

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