

Isles of Scilly Visitor Survey 2016

Final report

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

May 2017



Contents

	Page
Summary	3-6
Introduction	7-10
Visitor Profile	11-21
Characteristics of Visits	22-41
Information Sourcing	42-52
The Travel Experience	53-70
Visitors' Opinions	71-105
Visitor Expenditure	106-104
Appendices	



Summary

islands
partnership



Summary

- Almost all respondents were staying overnight on the Islands (95%).
- 67% of all visitors to the Islands were aged 45 years or over. Just 14% of visitors were aged 17 or under whilst 10% were aged 18-34 and the same proportion were aged 35-44 years.
- The average group size was 2.78 people.
- 86% of groups contained adults only.
- 97% of visitors were UK residents. Approximately 8% lived within the TR (Truro) postal code area and 6% within the PL (Plymouth) postal code area.
- 70% of visitors were on a repeat visit to the Islands. The average number of previous visits to the Islands was 10.41.
- The peak months for visits to the Islands were June to September.
- The peak months for visits of 2-4 nights to the Islands were August and September, compared with June, August and September for trips of 5-7 nights and June, July and August for trips of 8+ nights.
- 56% of visitors were visiting on their main holiday of the year.
- 55% of visitors were spending between 5 and 7 days on the Islands.
- 30% of visitors who arrived on a Saturday said it was very important that they did so, as was it for 22% of respondents who arrived on a Sunday and 19% who arrived on the Islands on a Friday.
- 52% of respondents were staying in self-catering accommodation on the Islands whilst a further 37% were staying in a hotel or B&B/guest house. 4

Summary

- 29% of respondents booked their accommodation over the phone, 26% booked it online and 24% booked via email.
- 65% of respondents felt it was 'very important' or 'important' that their accommodation on the Islands had a quality (star) rating.
- 80% of respondents had stayed on St. Mary's.
- Other than the island where they had stayed, 75% of respondents had visited Treco, 67% St. Martin's, 65% St. Agnes and 58% had visited Bryher.
- The scenery and/or peace and quiet (91% and 87% respectively) inspired the largest proportions of respondents to visit the Islands.
- The largest proportion of visitors (44%) had first heard about the Isles of Scilly from a previous visit and/or a further 26% from a personal recommendation.
- The www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites had been used by 62% and 49% of respondents respectively when planning and booking their visit to the Isles of the Islands.
- 37% 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.
- 37% of respondents had booked their holiday to the Islands 9 months or more in advance. 20% booked 2 months before their visit.
- All factors related to satisfaction with inter-island boat travel received good average scores of between 3.07 and 3.45 out of a max. of 4.00.
- 50% of respondents had travelled to the Islands on the Scillonian and a further 45% via the Skybus.
- Around three quarters of respondents (72%) had reached their connecting flight or boat to the Islands by car.

Summary

- The quality of the travel information, frequency of service, customer service and overall service all received good average scores of between 3.04 and 3.27 out of 4.00.
- On the whole Land's End received the highest levels of satisfaction amongst visitors (except for accessibility) and Penzance Quay the lowest.
- On the whole, visitor satisfaction levels with their Island experience were very high. Satisfaction levels were highest for the general atmosphere and sense of welcome and lowest for the quality and range of evening entertainment.
- The areas for attention are the range and quality of grocery provision, value of food & drink, quality of shops and range and quality of evening entertainment.
- The features and activities on the Islands which visitors considered of highest importance to them were rest and relaxation, walking, island-hopping, the beaches, wildlife, local produce, local plants and gardens and eating out.
- 60% of visitors said food and drink festivals would encourage them to visit with walking festivals (52%) music events (45%) and maritime festivals (40%) the next most popular.
- 68% of respondents said they would consider taking a winter break on the Isles of Scilly.
- 80% of visitors gave their holiday to the Islands an overall rating of 'excellent' and a further 18% as 'good'. The average mean score for their holiday overall was calculated at 3.79 out of 4.00.
- 98% of visitors said they would recommend the Isles of Scilly as a holiday destination to their friends or family.
- Average visitor spend per person per day on the Islands (excluding accommodation) was £41.51. Staying visitors spent an average of £41.34 per person per night on their accommodation.

Introduction

islands
partnership



Background & research objectives

In 2015, the Isles of Scilly attracted approximately 74,200 staying visits from UK and overseas visitors and approximately 33,000 day (**Source; Value of Tourism 2015 – South West Research Company Ltd.**).

The Islands' Partnership (IP) is a non-profit making company that is limited by guarantee. It is funded entirely by membership subscription together with some corporate sponsorship. The Partnership is responsible for marketing the Isles of Scilly as 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 were keen to undertake further research during 2016 to build upon the face to face visitor survey undertaken in 2013 and the online visitor surveys during 2014 and 2015 to provide them with an up-to-date profile of visitors and visit characteristics to the Islands. This report presents the findings of an online survey amongst visitors to the Isles of Scilly conducted throughout 2016. In addition, a self complete version of the online questionnaire was also made available at various locations for visitors to complete. 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 2,136 useable online submissions were received along with 245 self complete surveys resulting in a total survey sample of 2,381 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 their businesses and tourism industry. More specifically the findings of this survey will be used to:

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

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

Analysis segments

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

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

Visitor type:

- Staying visitor (Sample 2,213) **(STAYING)**
- Day visitor (Sample 121) **(DAY)**

Time of year when visited:

- Jan-Mar (Sample 50) **(JAN-MAR)**
- Apr-Jun (Sample 857) **(APR-JUN)**
- Jul-Sept (Sample 1,338) **(JUL-SEPT)**
- Oct-Dec (Sample 136) **(OCT-DEC)**

Previous visits:

- First time visitor (Sample 706) **(FIRST TIME)**
- Repeat visitor (Sample 1,675) **(REPEAT)**

Length of stay:

- 2-4 days (Sample 287) **(2-4 DAYS)**
- 5-7 days (Sample 1,292) **(5-7 DAYS)**
- 8+ days (Sample 634) **(8+ DAYS)**

Type of trip:

- Main holiday (Sample 1,291) **(MAIN)**
- Second holiday (Sample 611) **(SECOND)**
- Short break (Sample 301) **(SHORT)**

Islands stayed on:

- St. Mary's (Sample 1,653) **(ST MARY'S)**
- St. Agnes (Sample 81) **(ST AGNES)**
- Bryher (Sample 159) **(BRYHER)**
- Tresco (Sample 188) **(TRESKO)**
- St. Martin's (Sample 132) **(ST MARTIN'S)**

How travelled to the Islands:

- Skybus (Sample 1,017) **(SKYBUS)**
- Scillonian III (Sample 1,121) **(SCILLONIAN)**
- Private transport (Sample 32) **(PRIVATE)**
- Cruise ship (Sample 14) **(CRUISE)**
- Other transport (Sample 72) **(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 2016 survey only.

Visitor Profile

islands
partnership



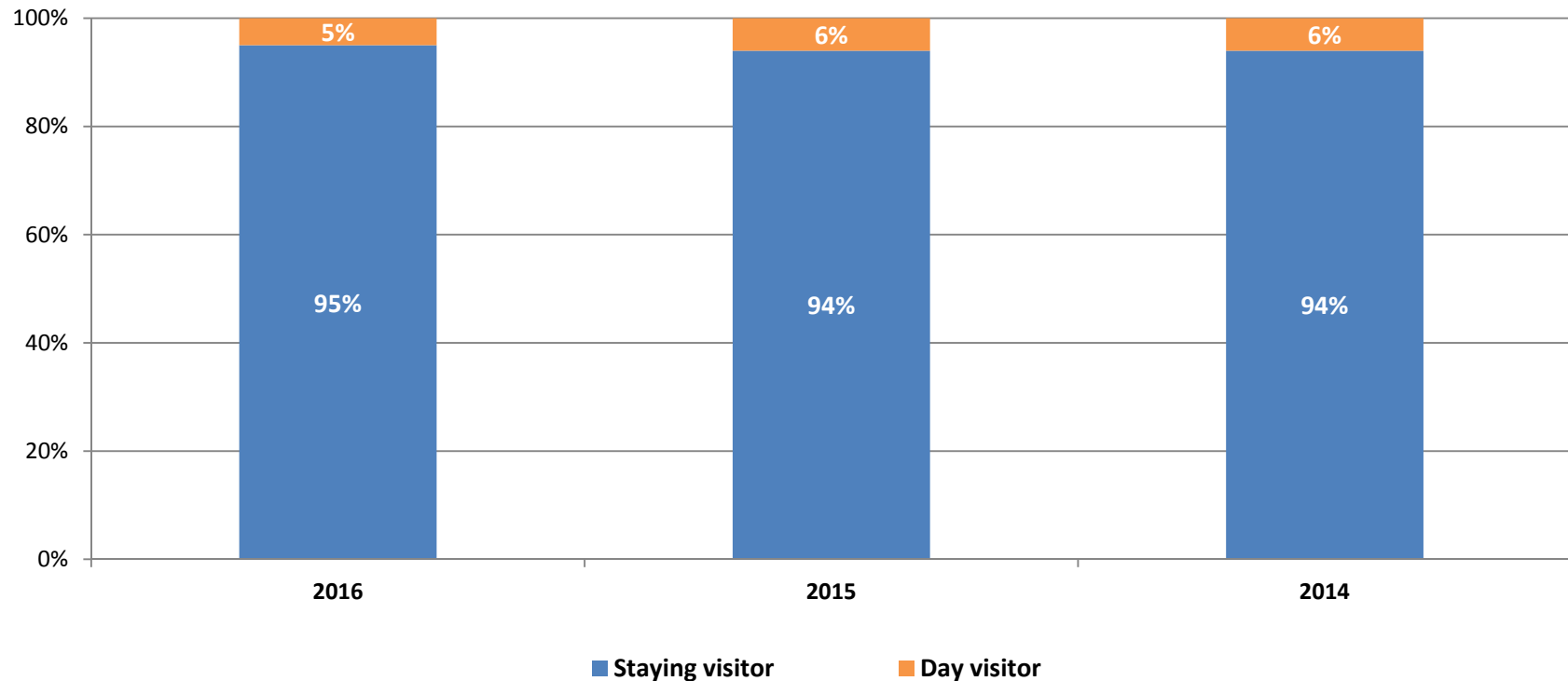
Almost all respondents were staying overnight on the Islands.

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

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

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

Visitor type 2014-2016

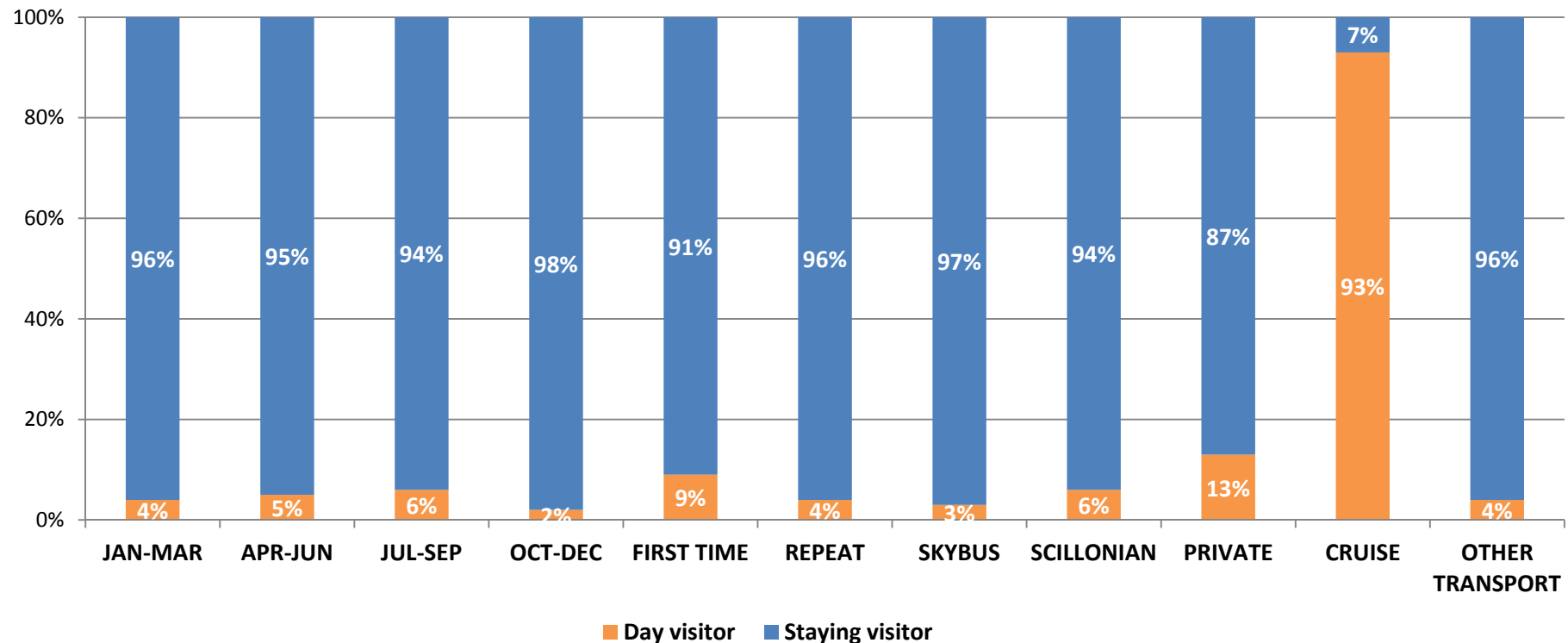


With the exception of respondents who had travelled to the Islands via cruise ship, the majority of respondents across all analysis segments were categorised as staying visitors.

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.

93% of respondents who had arrived in the Islands on a cruise ship and 13% who had travelled via private transport were categorised as day visitors along with 9% of first time visitors to the Islands. There was little variation in the results according to the islands which respondents had stayed on or the type of trip.

Visitor type by analysis segment 2016



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

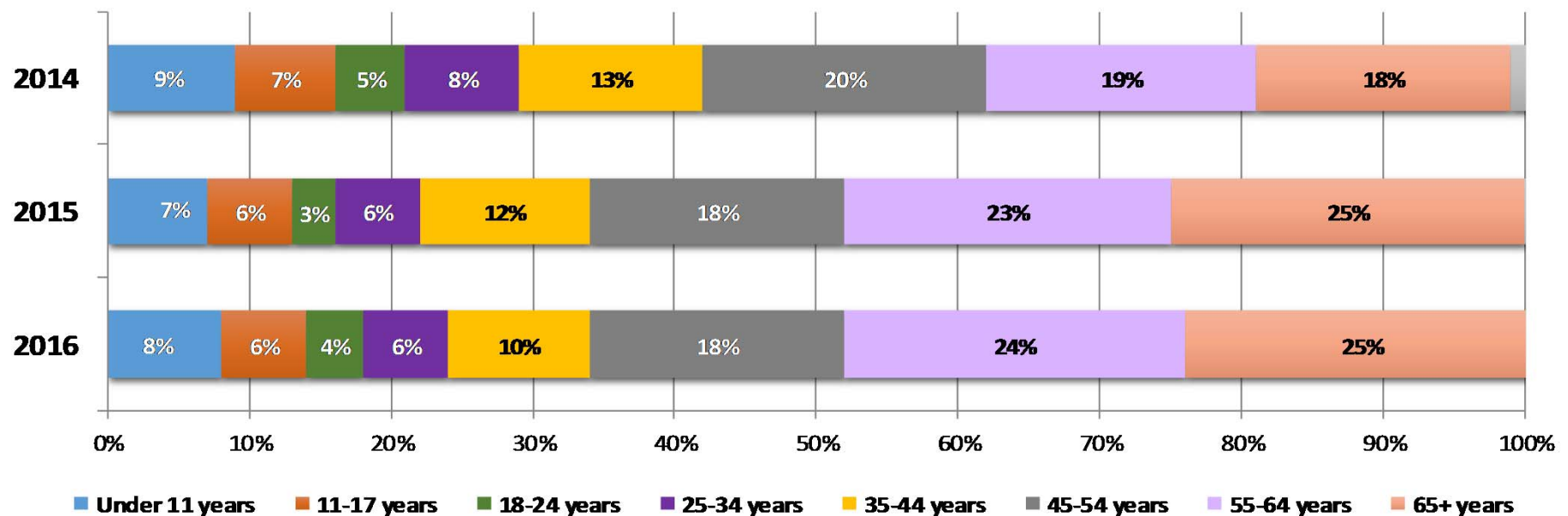
67% of all visitors to the Islands were aged 45 years or over including 25% aged 65+ years, 24% aged 55-64 years and 18% aged 45-54 years. Just 14% of visitors were aged 17 or under whilst 10% were aged 18-34 and 10% 35-44 years.

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

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

The age profile of visitors and composition of groups was similar to the 2015 survey and there was little variation in the results according to each of the analysis segments.

Age group 2014-2016



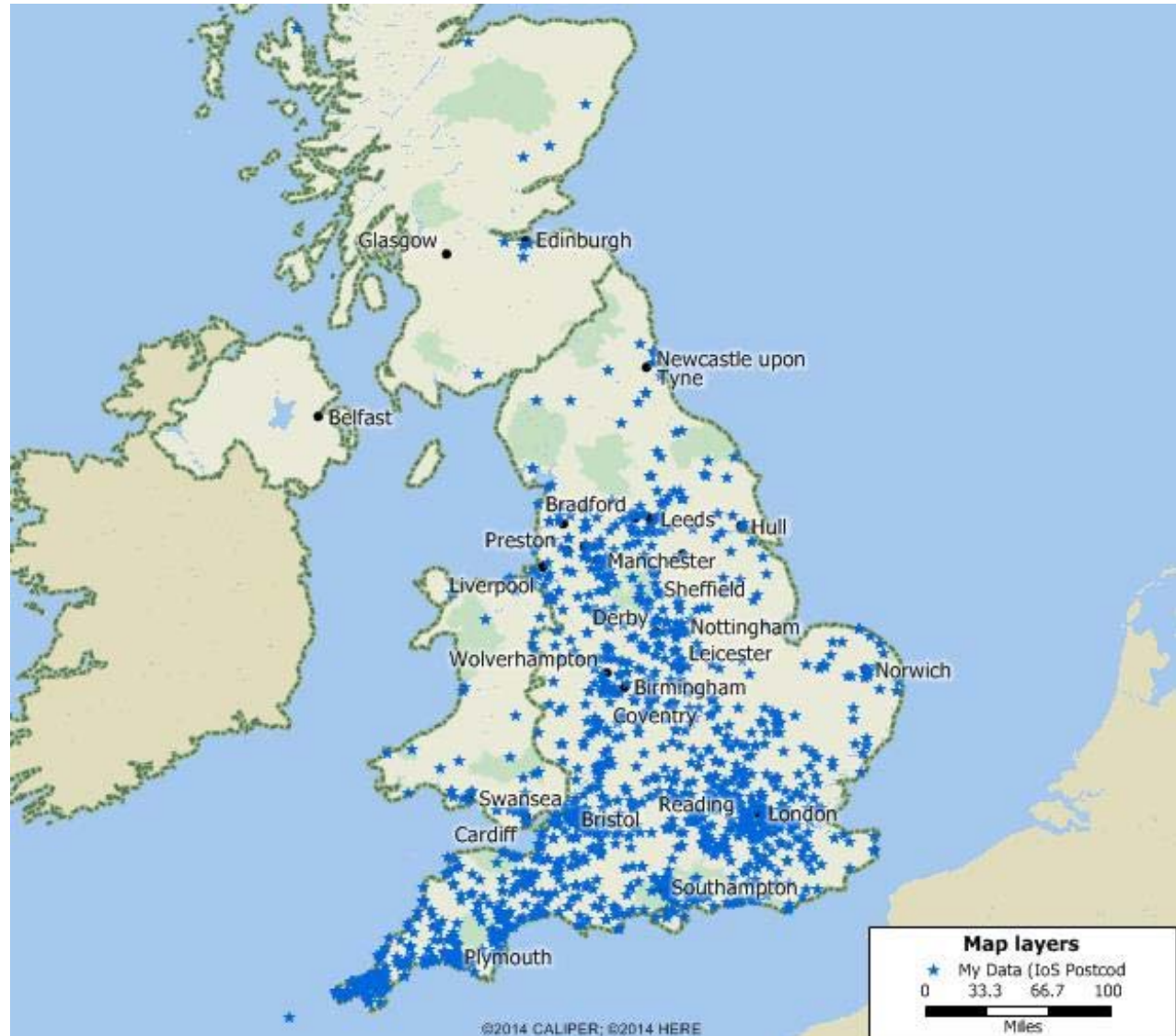
97% of visitors were UK residents. Approximately 8% lived within the TR (Truro) postal code area and 6% within the PL (Plymouth) postal code area.

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

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

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

Around 8% of all UK respondents lived within the TR (Truro) postal code area. 6% lived within PL (Plymouth), 5% within EX (Exeter) and 4% within BS (Bristol) postal code areas.



Postcode area– UK RESPONDENTS (97% OF SAMPLE)	
TRURO	8%
PLYMOUTH	6%
EXETER	5%
BRISTOL	4%
TAUNTON	3%
COVENTRY	2%
GLOUCESTER	2%
READING	2%
SWINDON	2%
DERBY	2%
LEICESTER	2%
BATH	2%
NOTTINGHAM	2%
OXFORD	2%
SOUTHAMPTON	2%
GUILDFORD	2%
HEMEL HEMPSTEAD	2%
TORQUAY	2%
DORCHESTER	2%
PORTSMOUTH	2%
LONDON (all postal areas)	2%
OTHER UK (1% EACH OR LESS)	48%
BASE	1,397

The Islands attract a large number of frequent visitors who have been visiting the Islands for many years. 70% of visitors were on a repeat visit to the Islands.
The average number of previous visits to the Islands was 10.41.

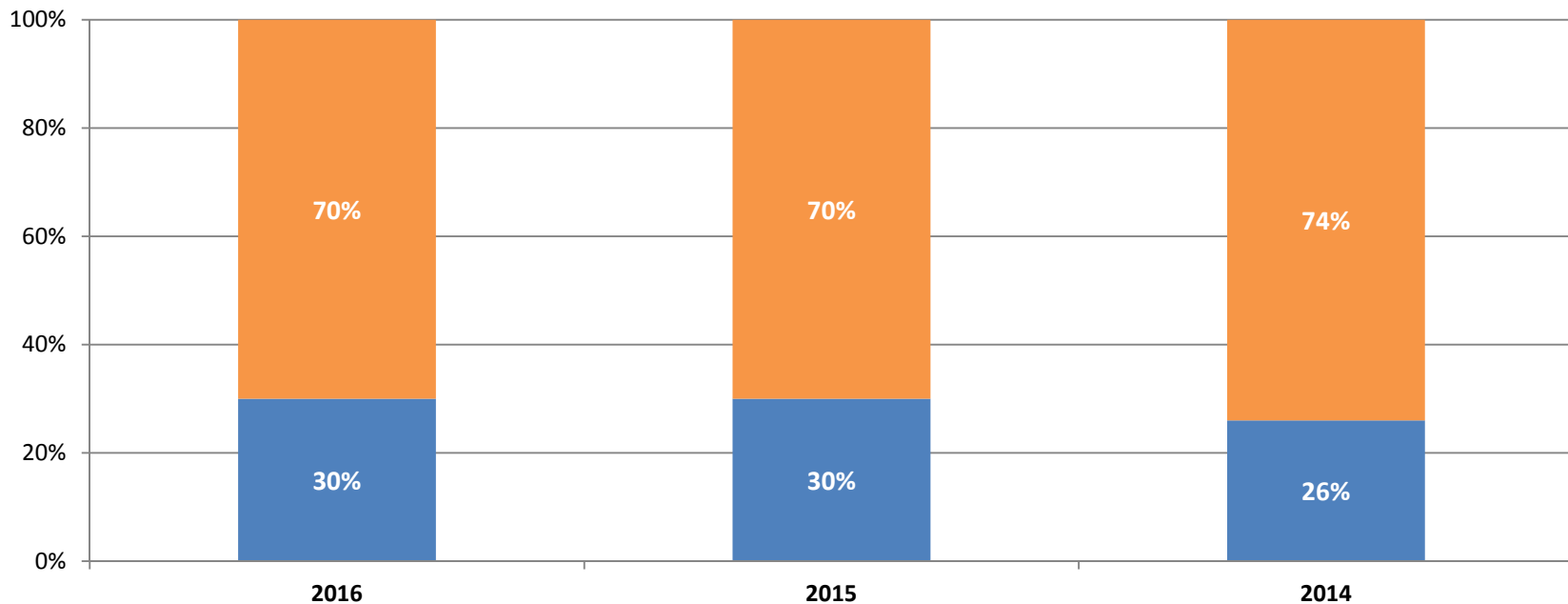
The Islands attract a large number of frequent visitors who have been visiting the Islands for many years.

70% of respondents were on a repeat visit to the Isles of Scilly (the same proportion as during 2015 and compared with 74% during 2014).

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

The results by analysis segment are shown overleaf.

Whether first time or repeat visit to the Isles of Scilly 2014-2016



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

The proportion of repeat visitors to the Islands was highest amongst those staying overnight on the Islands (71%), those visiting during January to March (82%), those on their main holiday of the year (75%), those staying on Bryher (84%), those arriving by Skybus (76%) and those staying for 8+ days (89%).

51% of day visitors, 31% of those visiting during July to September, 47% of those on a short break, 30% of those staying on St. Mary's, 79% of those arriving by cruise ship and 60% 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 2016	First time visitor	Repeat visitor	Whether first time or previous visitor by analysis segment 2016	First time visitor	Repeat visitor
STAYING	29%	71%	SKYBUS	24%	76%
DAY	51%	49%	SCILLONIAN	33%	67%
JAN-MAR	18%	82%	PRIVATE	53%	47%
APR-JUN	28%	72%	CRUISE	79%	21%
JUL-SEP	31%	69%	OTHER TRANSPORT	29%	71%
OCT-DEC	28%	72%	2-4 DAYS	60%	40%
MAIN	25%	75%	5-7 DAYS	30%	70%
SECOND	28%	72%	8+ DAYS	11%	89%
SHORT	47%	53%			
ST MARY'S	30%	70%			
ST AGNES	26%	74%			
BRYHER	16%	84%			
TRESCO	26%	74%			
ST MARTIN'S	24%	76%			

Base 2,381

30% of respondents were on their first ever visit to the Isles of Scilly.

When asked why they chose to visit many mentioned the fact that they had always wanted to visit the Islands.

30% of respondents were on their first ever visit to the Isles of Scilly. They were asked what made them choose to visit the Isles of Scilly and the responses are summarised in the 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 fact that they had always wanted to visit the Islands. Other key reasons included visiting for a holiday, to visit friends or family and as the result of a recommendation.



70% of respondents were on a repeat visit to the Isles of Scilly.

When asked why they chose to return to the Islands for another visit many mentioned the fact that the Islands were beautiful.

70% of respondents were on a repeat visit to the Isles of Scilly. They were asked what made them choose to return to the Isles of Scilly for another visit and the responses are summarised in the 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 fact that the Islands were beautiful. Other key words included the scenery, beauty and being friendly.



52% of repeat visitors to the Islands described their FIRST ever visit to the Isles of Scilly as being their main holiday of the year.

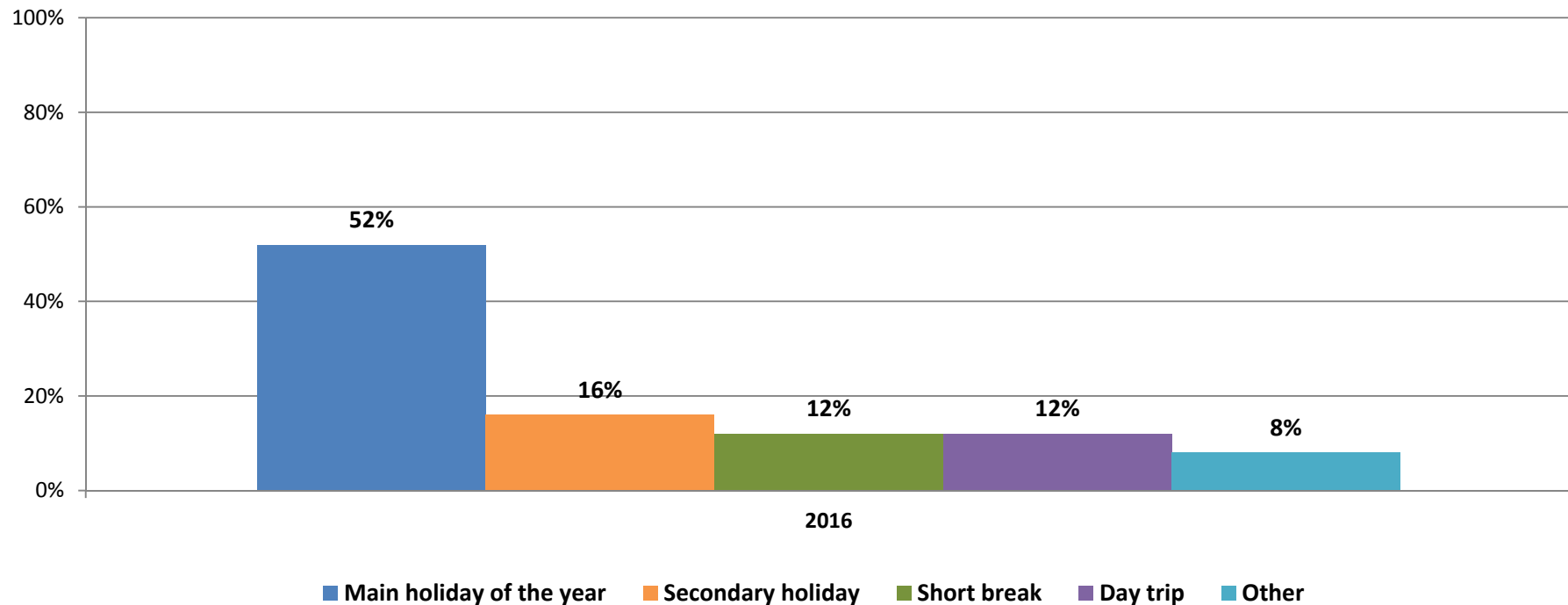
For the first time during the 2016 survey, repeat visitors to the Islands were asked to best describe their FIRST ever visit to the Isles of Scilly.

The majority of respondents (52%) said they had visited on their main holiday of the year.

16% of respondents had first visited the Islands on a secondary holiday, 12% on a short break and the same proportion as part of a day trip.

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

Best description of FIRST visit to the Islands – repeat visitors only 2016



Characteristics of Visits

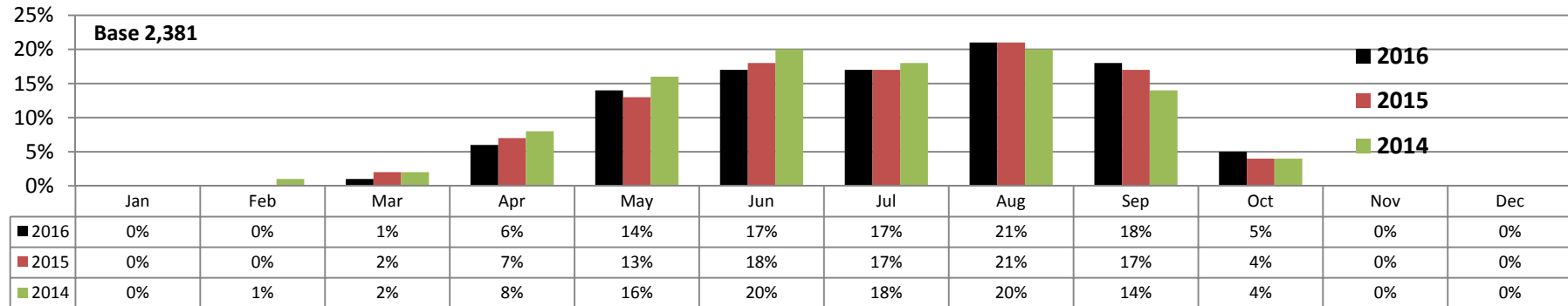
islands
partnership



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

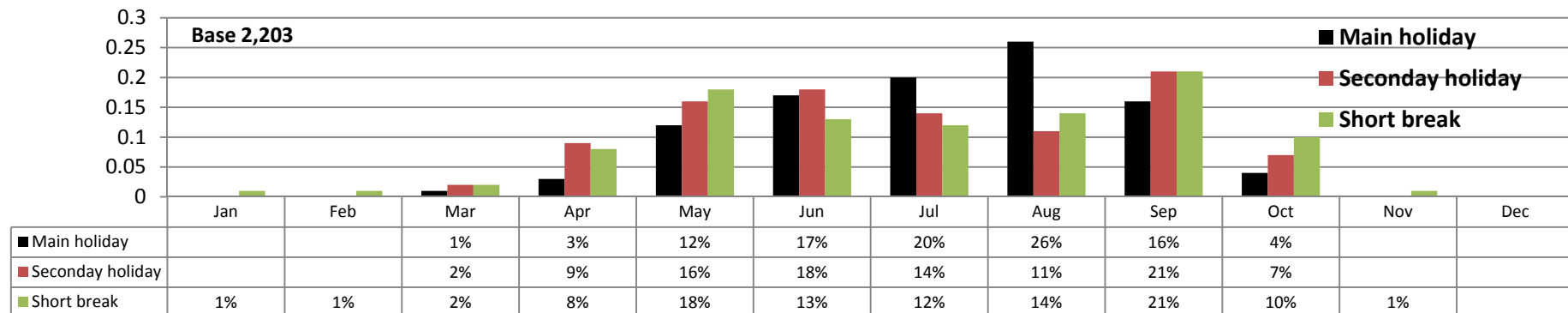
The peak months for visits to the Islands were June to September with 17% of respondents in each case having visited during June and July, 21% in August and 18% in September. There was little variation in the results by each of the analysis segments.

Month of visit 2014-2016



When the data was further analysed by the type of trip a higher proportion of visitors on their main holiday of the year had visited the Isles of Scilly during the months of July and August (20% and 26% respectively). In contrast, during June a higher proportion of those visitors on their second holiday had visited the Islands (18%). May (18%) and September (21%) are key months for short breaks to the Islands.

Month of visit by type of trip 2016

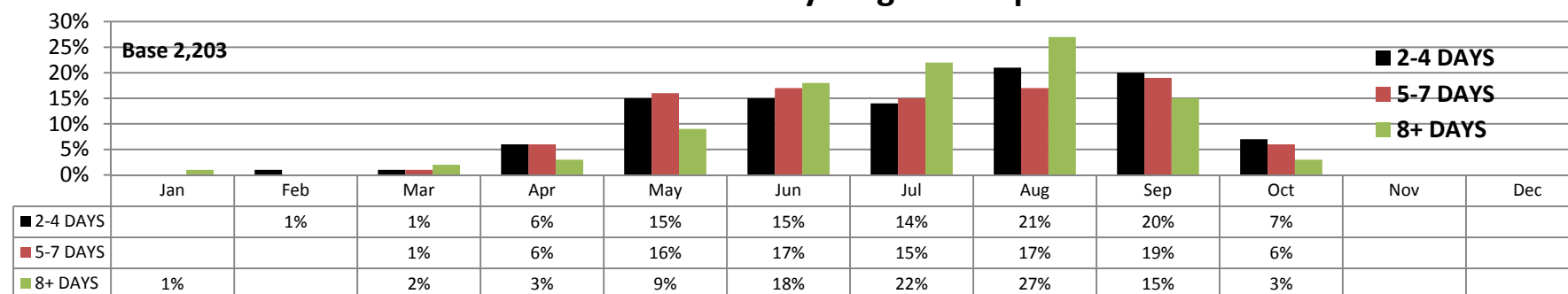


There was little variation in the results compared with 2014 or 2015 (see table overleaf) or by each of the analysis segments.

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

The peak months for visits of 2-4 nights to the Islands were August (21%) and September (20%), compared with June, August and September for trips of 5-7 nights (17% in each case for June and August and 19% for September) and June (18%), July (22%) and August (27%) for trips of 8+ nights.

Month of visit by length of trip 2016



Month of visit by year and type of trip

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

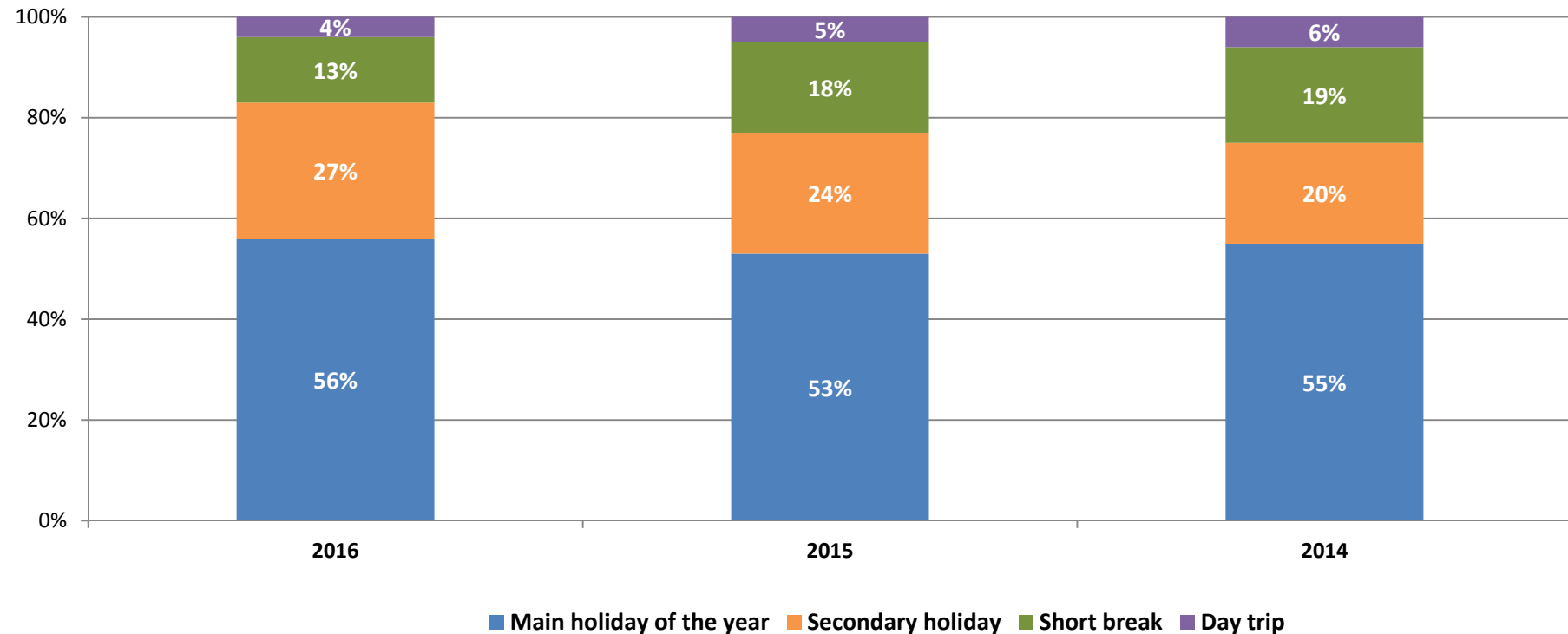
56% of visitors were visiting the Islands on their main holiday of the year.

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

27% of respondents were on a secondary holiday to the Isles of Scilly (24% 2015 and 20% 2014). 13% of respondents were on a short break (18% and 19% during 2015 and 2014 respectively).

The results by analysis segment are provided overleaf.

Type of trip 2014-2016



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

The highest proportion of visitors on their main holiday of the year to the Islands was amongst those visiting during July to September (62%), those on a repeat visit (60%), those staying on St. Agnes (68%), those arriving via the Skybus (55%) and Scillonian (60%) and those staying for 8+ nights (82%).

In term of those most likely to be on a secondary holiday to the Isles of Scilly, these included 37% of those respondents visiting during the months of January to March, 36% of those staying on Tresco, 34% of those arriving by private transport and 35% of those staying for between 5 and 7 nights.

Short breaks were most popular amongst those visiting during October to December (24%), first time visitors (21%), those arriving by private transport (25%) and those staying for 2-4 days (60%).

Type of trip by analysis segment 2016	Main holiday	Secondary holiday	Short break	Day trip	Type of trip by analysis segment 2016	Main holiday	Secondary holiday	Short break	Day trip
JAN-MAR	37%	37%	20%	6%	SKYBUS	55%	29%	14%	3%
APR-JUN	50%	32%	14%	4%	SCILLONIAN	60%	25%	11%	5%
JUL-SEP	62%	22%	11%	5%	PRIVATE	28%	34%	25%	13%
OCT-DEC	42%	33%	24%	2%	CRUISE	29%	14%	-	57%
FIRST TIME	47%	25%	21%	7%	OTHER TRANSPORT	53%	28%	17%	3%
REPEAT	60%	27%	10%	3%	2-4 DAYS	19%	21%	60%	-
ST MARY'S	60%	27%	13%	-	5-7 DAYS	55%	35%	10%	-
ST AGNES	68%	19%	14%	-	8+ DAYS	83%	17%	-	-
BRYHER	65%	25%	9%	-					
TRESCO	48%	36%	15%	-					
ST MARTIN'S	64%	26%	10%	-					

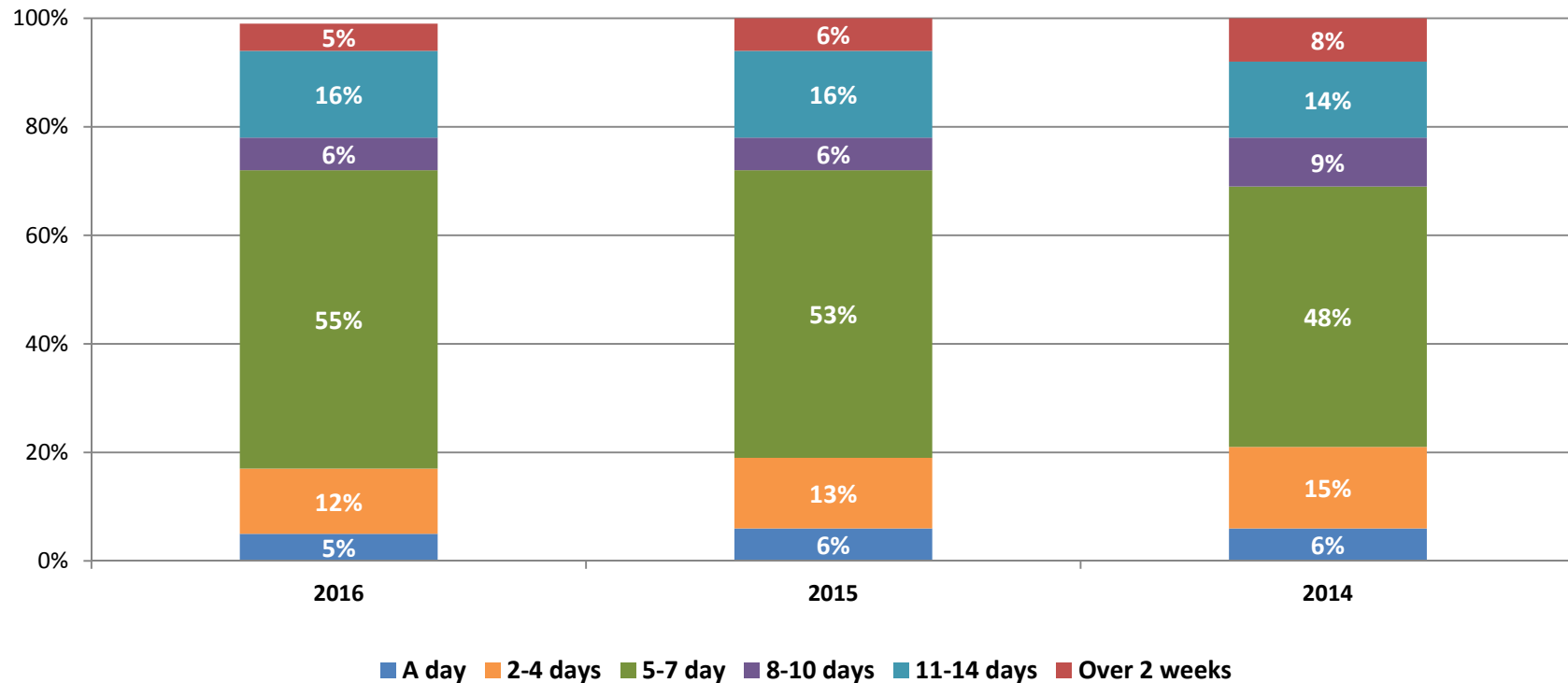
55% of visitors were spending between 5 and 7 days on the Islands.

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

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

The results by analysis segment are provided overleaf.

Duration of stay 2014-2016



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

With the exception of those on a short break, the largest proportion of respondents across all the analysis segments were spending between 5 and 7 days on the Islands including 72% of those on a secondary holiday.

26% of visitors to the Islands during January to March, 28% of repeat visitors, 32% who were on their main holiday of the year, 36% of those staying on St. Agnes and 35% of those staying on St Martins, along with 30% of respondents who had arrived via an other mode of transport were spending a longer period on the Islands of 11 days or more.

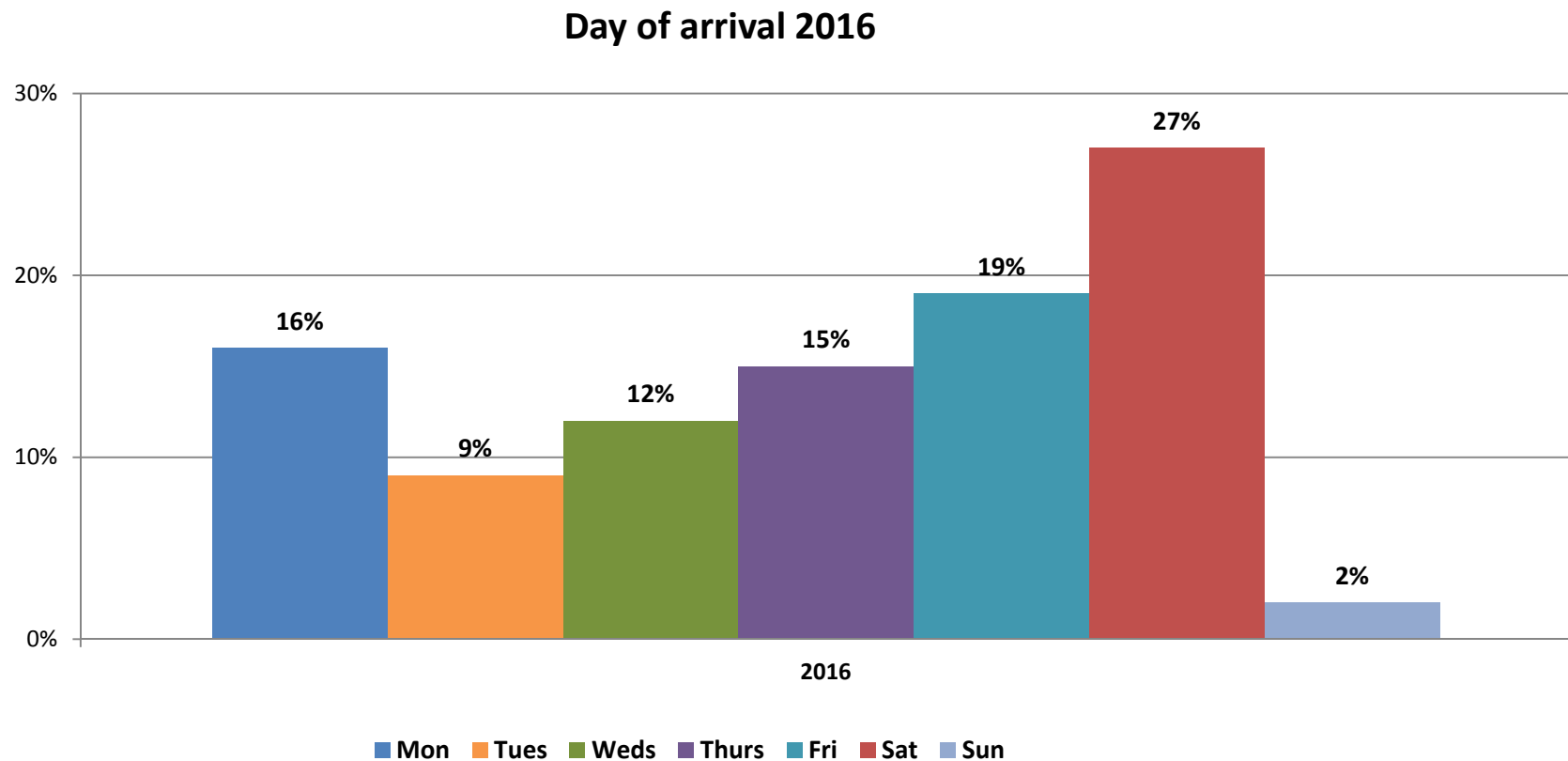
Duration of stay by analysis segment 2016	A day	2-4 days	5-7 days	8-10 days	11-14 days	Over 2 weeks	Duration of stay by analysis segment 2016	A day	2-4 days	5-7 days	8-10 days	11-14 days	Over 2 weeks
JAN-MAR	4%	16%	51%	2%	12%	14%	ST MARY'S	1%	13%	59%	6%	17%	4%
APR-JUN	5%	12%	60%	4%	13%	5%	ST AGNES	1%	12%	36%	15%	19%	17%
JUL-SEP	6%	12%	51%	7%	19%	5%	BRYHER	-	9%	49%	11%	22%	9%
OCT-DEC	2%	17%	63%	5%	8%	5%	TRESCO	2%	15%	57%	6%	13%	7%
FIRST TIME	9%	25%	57%	5%	4%		ST MARTIN'S	2%	7%	49%	8%	15%	20%
REPEAT	4%	7%	55%	6%	21%	7%	SKYBUS	3%	11%	56%	6%	18%	5%
MAIN	1%	4%	54%	9%	24%	8%	SCILLONIAN	6%	12%	56%	6%	15%	5%
SECOND	1%	10%	72%	4%	11%	2%	PRIVATE	13%	31%	47%	3%	6%	-
SHORT	2%	55%	42%	1%	-	-	CRUISE	93%	7%	-	-	-	-
							OTHER TRANSPORT	4%	13%	49%	4%	19%	11%

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

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

16% of respondents arrived on a Monday, 15% on a Thursday, 12% on a Wednesday and 9% on a Tuesday. Just 2% arrived on a Sunday.

The results by analysis segment are provided overleaf.



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

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

The only exceptions were those visiting during January to March, those on a short break, those staying on Tresco, those arriving by private transport and those staying 2-4 days - the largest proportion of whom in each case had arrived on a Monday. In addition, 33% of those staying on St Agnes arrived on a Friday.

Day of arrival by analysis segment 2016	Mon	Tues	Weds	Thurs	Fri	Sat	Sun	Type of trip by analysis segment 2016	Mon	Tues	Weds	Thurs	Fri	Sat	Sun
JAN-MAR	29%	19%	5%	12%	10%	26%	-	BRYHER	15%	11%	12%	8%	25%	26%	3%
APR-JUN	17%	9%	13%	15%	19%	25%	1%	TRESCO	23%	15%	13%	14%	19%	14%	2%
JUL-SEP	14%	9%	13%	15%	18%	27%	3%	ST MARTIN'S	11%	7%	11%	11%	20%	36%	5%
OCT-DEC	15%	12%	7%	13%	25%	27%	1%	SKYBUS	17%	10%	11%	18%	21%	21%	1%
FIRST TIME	19%	10%	12%	14%	16%	25%	4%	SCILLONIAN	13%	8%	13%	13%	17%	32%	3%
REPEAT	14%	9%	12%	15%	20%	27%	2%	PRIVATE	21%	21%	11%	18%	7%	18%	4%
MAIN	14%	8%	13%	15%	18%	20%	2%	CRUISE	-	17%	17%	-	17%	33%	17%
SECOND	14%	8%	13%	14%	21%	27%	2%	OTHER TRANSPORT	20%	6%	16%	3%	16%	33%	7%
SHORT	25%	16%	8%	18%	18%	12%	3%	2-4 DAYS	21%	17%	8%	16%	21%	13%	4%
ST MARY'S	15%	9%	13%	16%	18%	27%	2%	5-7 DAYS	16%	8%	14%	15%	17%	29%	2%
ST AGNES	19%	10%	2%	16%	33%	17%	2%	8+ DAYS	13%	9%	10%	16%	22%	28%	1%

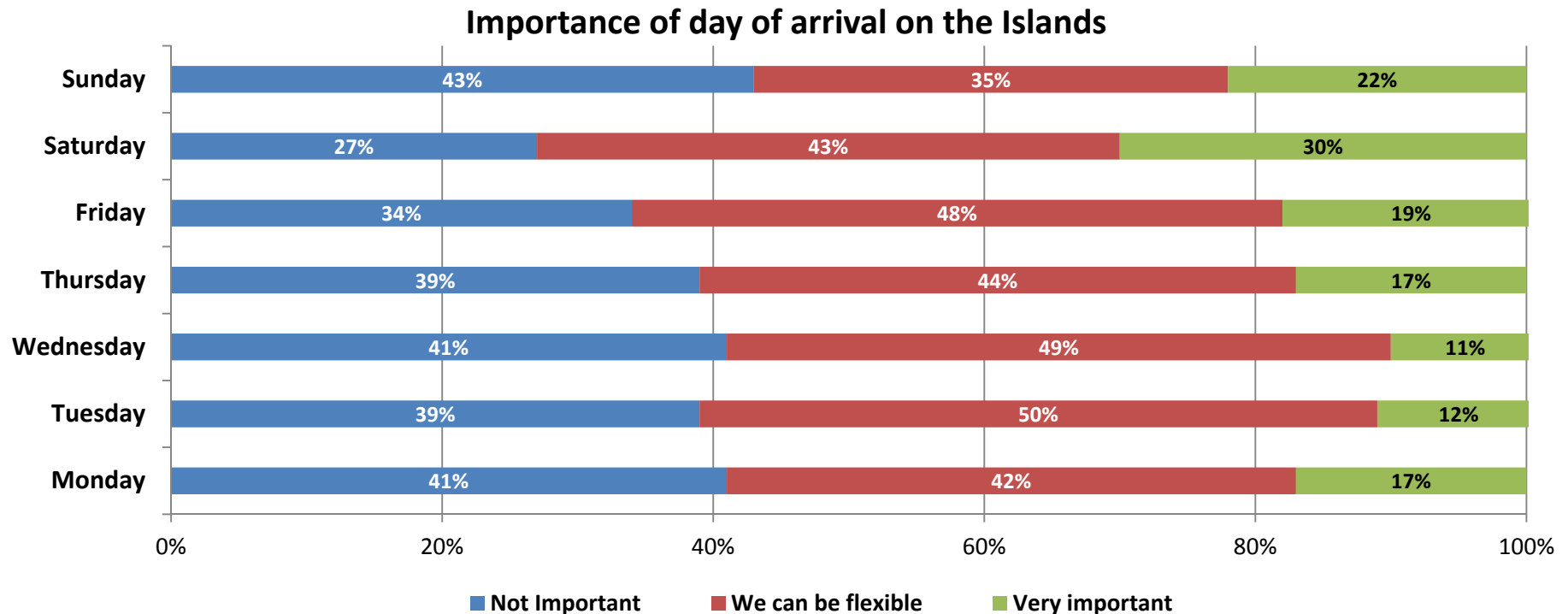
30% of visitors said it was very important that they arrived on the Islands on a Saturday, whilst 22% said the same about a Sunday and 19% a Friday.

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

30% of visitors who arrived on a Saturday said it was very important that they did so, as was it for 22% of respondents who arrived on a Sunday and 19% who arrived on the Islands on a Friday.

With the exception of Sunday as an arrival day, the largest proportion of respondents in each case (42%-50%) said they could be flexible about which day they arrived. The largest proportion of visitors arriving on a Sunday (43%) said it was not important to them which day of the week they arrived.

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



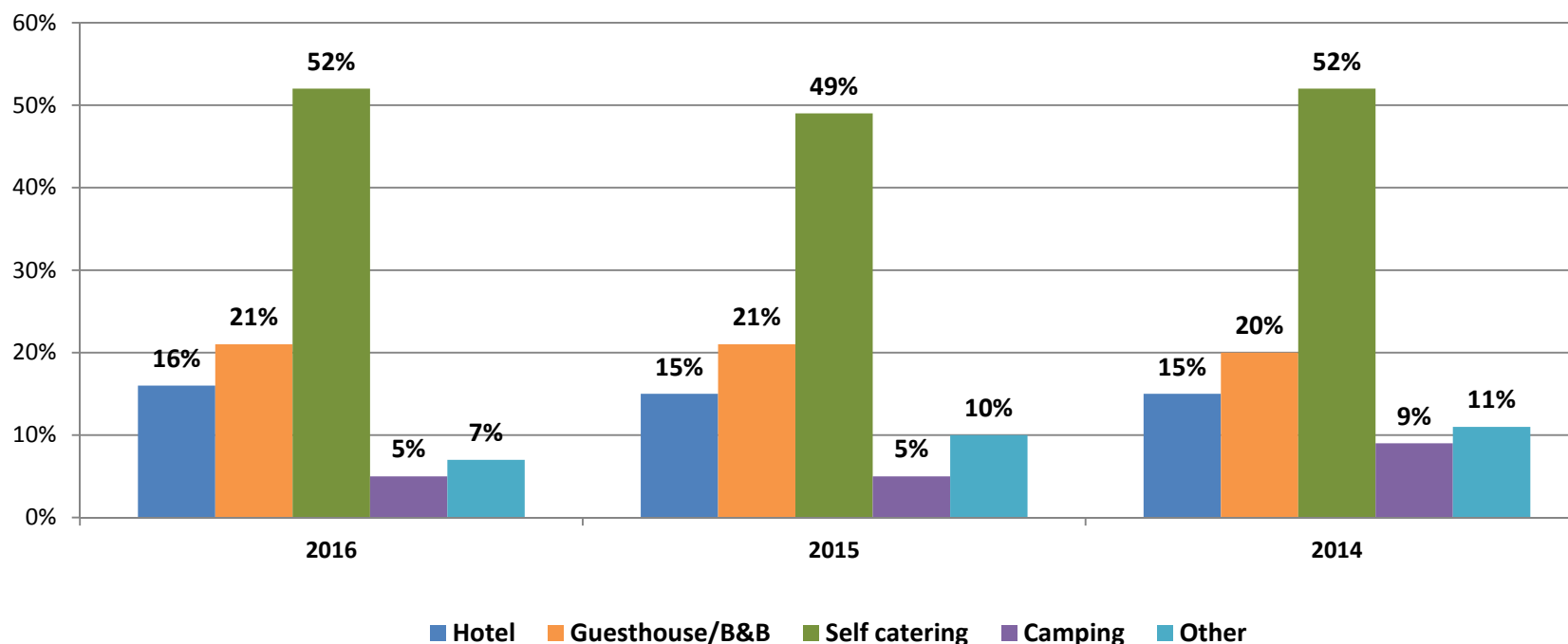
52% of respondents were staying in self-catering accommodation on the Islands whilst a further 37% were staying in a serviced hotel or B&B/guest house.

52% of respondents were staying in self-catering accommodation on the Islands (49% and 52% during 2015 and 2014 respectively) whilst a further 37% (36% 2015 and 35% 2014) were staying in a hotel (16%) or B&B/guest house (21%).

Just 5% of respondents were camping during their visit (the same proportion as during 2015 and compared with 9% during 2014) whilst 7% 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.

Accommodation used 2014-2016



53% of first time visitors, 67% of those on a short break and 81% staying for 2-4 days used serviced accommodation on the Islands.

53% of first time visitors, 67% of those on a short break and 81% staying for 2-4 days used serviced accommodation on the Islands.

69% of those visiting during January to March, 60% of previous visitors, 58% on visitors on their main holiday of the year, 57% of those staying on TreSCO, 54% arriving by Skybus, 53% arriving by Scillonian and 57% staying for 5-7 days were using self catering accommodation.

28% of visitors staying on St. Agnes were camping.

Accommodation used by analysis segment 2016	Hotel	Guesthouse /B&B	Self catering	Camping	Other	Accommodation used by analysis segment 2016	Hotel	Guesthouse /B&B	Self catering	Camping	Other
JAN-MAR	14%	10%	69%	-	12%	SKYBUS	20%	19%	54%	1%	7%
APR-JUN	16%	20%	55%	4%	6%	SCILLONIAN	12%	22%	53%	9%	4%
JUL-SEP	14%	22%	50%	7%	6%	PRIVATE	14%	7%	18%	14%	46%
OCT-DEC	24%	19%	51%	1%	6%	CRUISE	-	-	17%	-	83%
FIRST TIME	25%	28%	34%	7%	7%	OTHER TRANSPORT	11%	24%	47%	4%	12%
REPEAT	12%	18%	60%	5%	8%	2-4 days	39%	42%	9%	6%	6%
MAIN	11%	18%	58%	7%	7%	5-7 days	14%	20%	57%	4%	4%
SECOND	17%	19%	56%	3%	5%	8+ days	8%	13%	63%	9%	10%
SHORT	32%	35%	18%	6%	10%						
ST MARY'S	15%	24%	52%	3%	6%						
ST AGNES	5%	7%	43%	28%	15%						
BRYHER	23%	11%	49%	9%	8%						
TRESCO	16%	4%	57%	2%	21%						
ST MARTIN'S	15%	7%	44%	21%	13%						

Base 2,116 Please note that multiple responses were provided for this question.

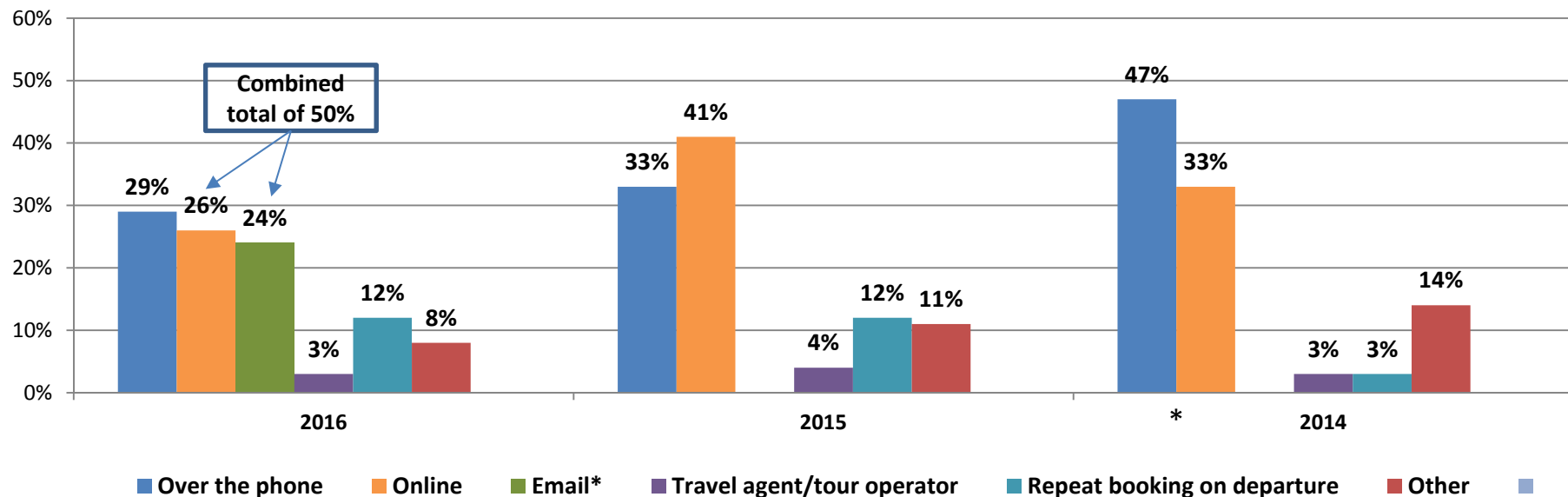
29% of respondents booked their accommodation over the phone, 26% booked it online and 24% booked via email.

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

12% of respondents booked during their last visit (the same proportion as during 2015 and compared with 3% during 2014) and 3% booked through a travel agent or tour operator (4% and 3% during 2015 and 2014 respectively). There was little variation in the results by analysis segment.

To see the full list of 'other' ways in which respondents had booked their accommodation (8%) please see the appendices which accompany this report.

How booked accommodation 2014-2016



47% of respondents would have preferred to book online had the option been available to them compared with the 26% of respondents who actually did so.

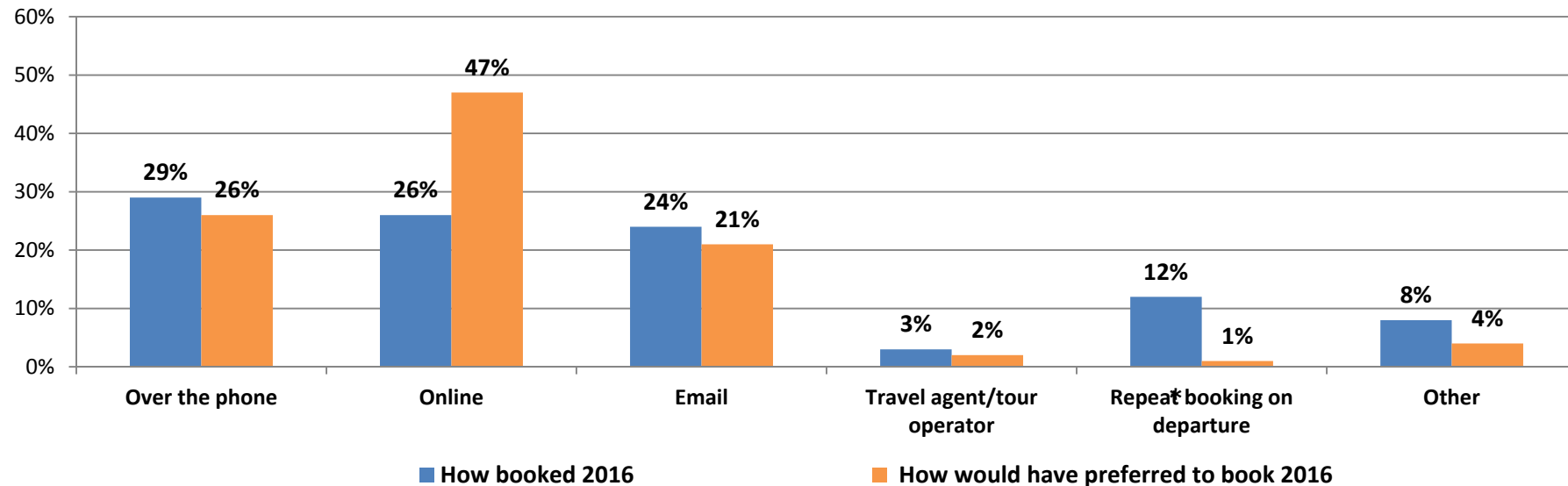
When asked if all booking options had been available to them, which they would have preferred to use, 47% of respondents would have preferred to do so online, compared with the 29% who actually did so.

26% of respondents would have preferred to book over the phone (the same proportion who actually did so) and 21% via email, compared with the 24% who actually did so.

Only 1% would have preferred to make a repeat booking on their departure, compared with the 12% 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.

Preferred method of booking 2016

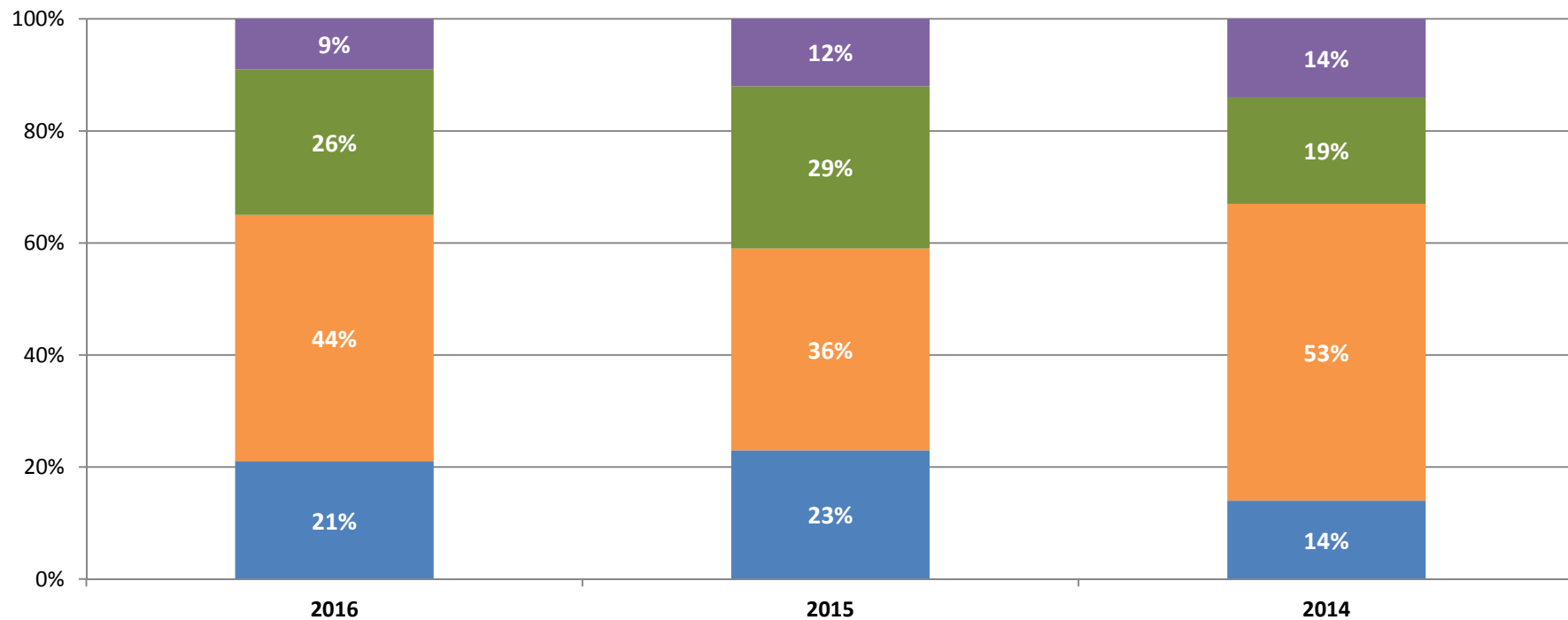


65% of respondents felt it was 'very important' or 'important' that their accommodation on the Islands had a quality (star) rating.

65% of respondents felt it was 'very important' (21%) or 'important' (44%) that their accommodation on the Islands had a quality (star) rating compared with 59% during 2015 and 67% during 2014.

There was little variation in the results by analysis segment.

Importance of accommodation having a quality (star) rating 2014-2016



Base 1,918

■ Very important ■ Important ■ Not very important ■ Not important at all

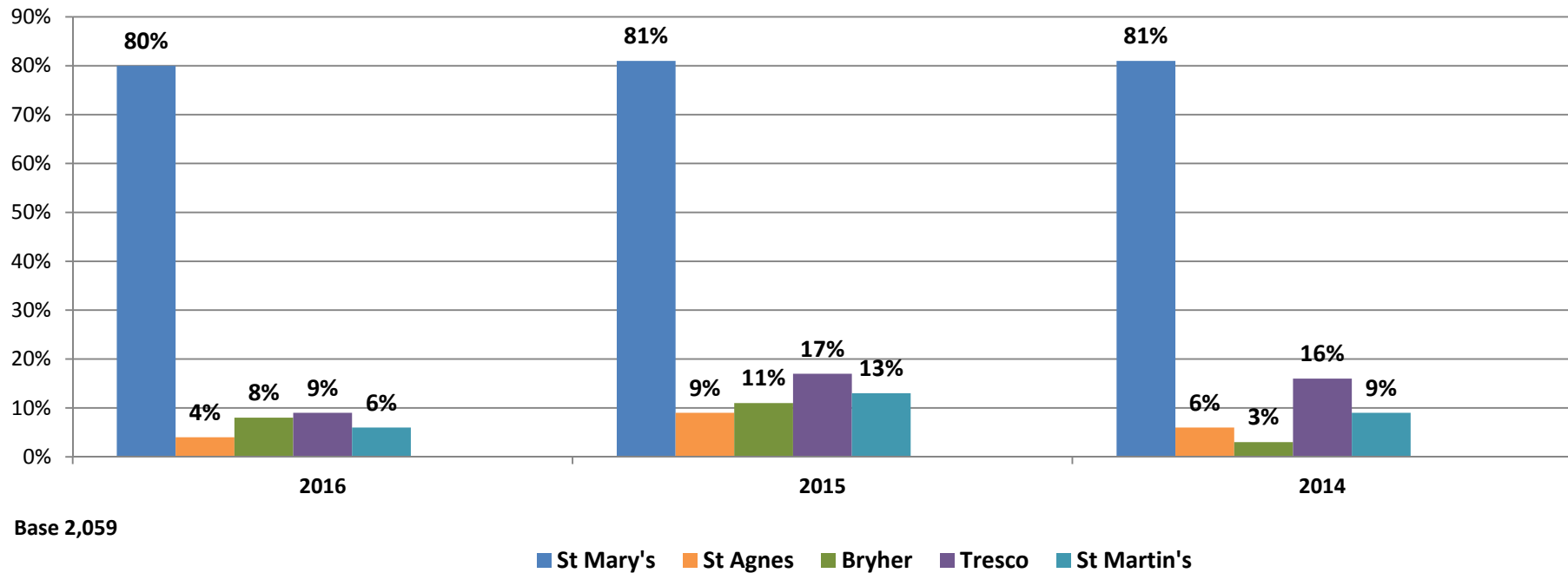
80% of respondents had stayed on St. Mary's.

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

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

There was little variation in the results by analysis segment.

Island where stayed 2014-2016



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

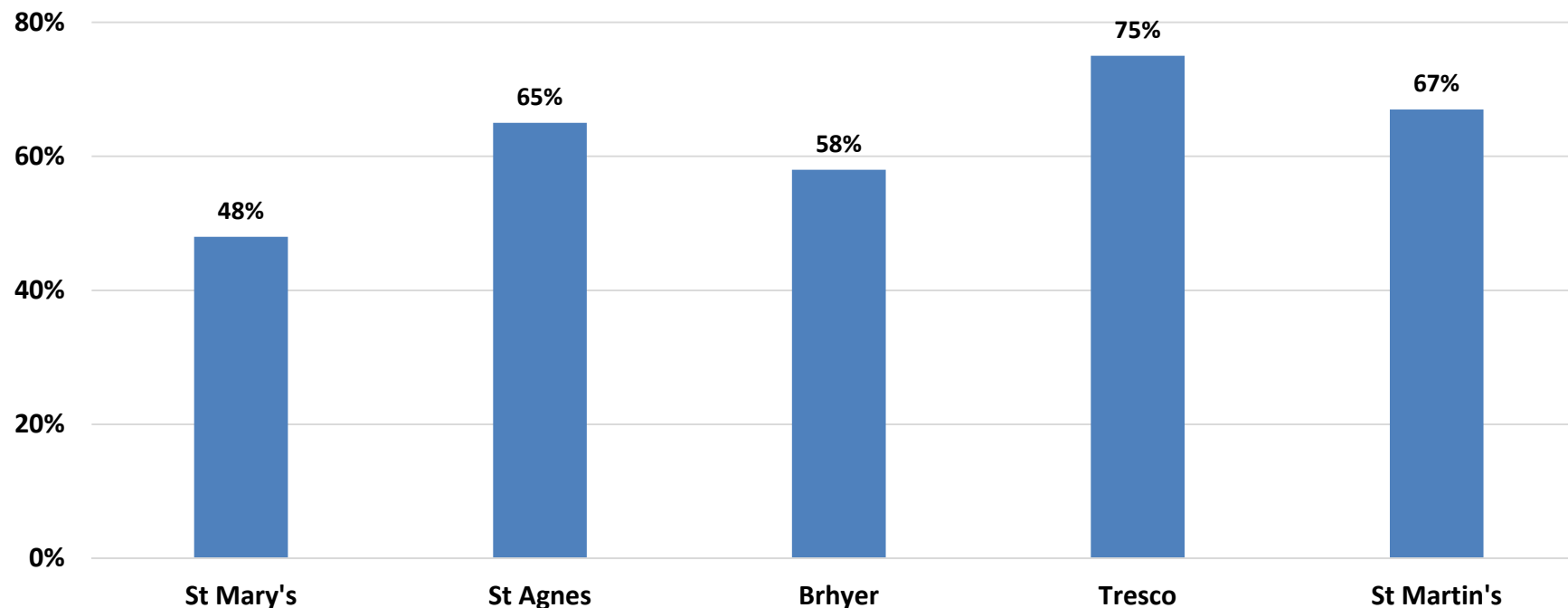
Other than the island where they had stayed, 75% of respondents had visited Tresco, 67% St. Martin's and 65% St. Agnes.

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

75% of respondents had visited Tresco during their visit to the Islands, 67% had visited St. Martin's and 65% St. Agnes. 58% had visited Bryher and 48% St. Mary's (80% had stayed on St Mary's).

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

Islands visited (other than the Island where they had stayed) 2016



Excluding the island they had stayed on 81% of respondents staying on St. Mary's had visited Tresco, along with 82% of those staying on Bryher. 82% of respondents staying on St. Agnes had visited St. Mary's, along with 80% of those staying on St. Martin's. 77% of respondents staying on Tresco had visited Bryher.

Again, excluding the island they had stayed on, 81% of respondents staying on St. Mary's had visited Tresco, along with 82% of those staying on Bryher.

82% of respondents staying on St. Agnes had visited St. Mary's, along with 80% of those staying on St. Martin's, 79% staying on Brhyer and 75% staying on Tresco.

77% of respondents staying on Tresco had visited Bryher.

Islands visited (excluding the island where stayed)	Island where stayed				
	ST MARY'S	ST AGNES	BRYHER	TRESCO	ST MARTINS
TRESCO	81%	60%	82%	-	65%
ST. MARTIN'S	74%	51%	59%	50%	-
ST. AGNES	72%	-	56%	41%	47%
BRYHER	61%	51%	-	77%	48%
ST. MARY'S	-	82%	79%	75%	80%

Base 2,120

The scenery and/or peace and quiet (91% and 87% respectively) inspired the largest proportions of respondents to visit the Islands.

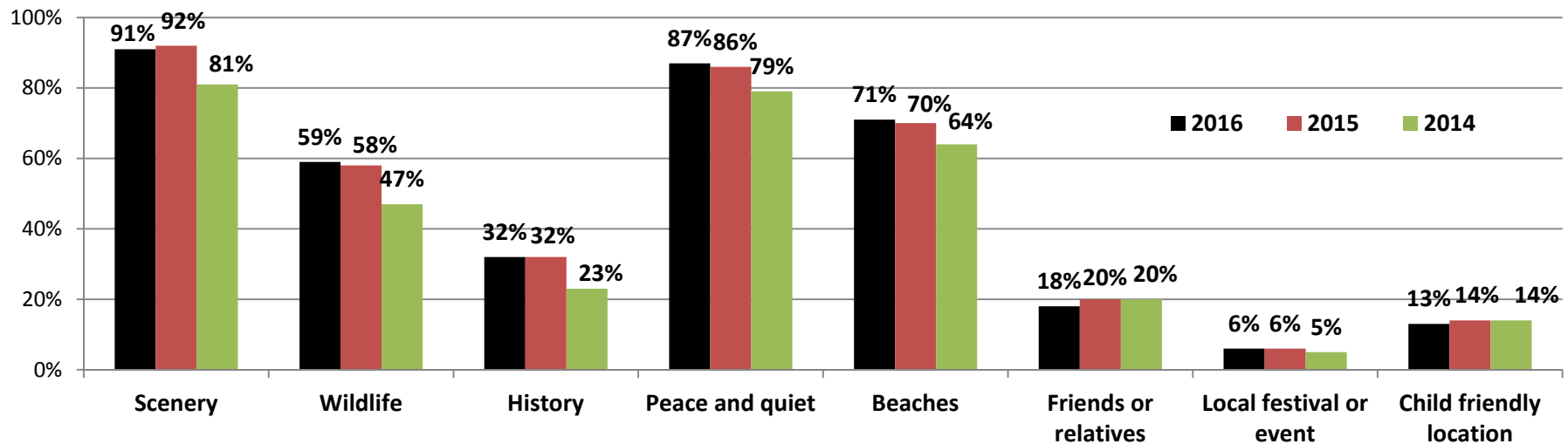
Survey respondents were asked what inspired them to visit the Isles of Scilly. The scenery (91%, compared with 92% and 81% during 2015 and 2014 respectively) and/or the peace and quiet (87%, compared with 86% and 79% during 2015 and 2014 respectively) inspired the largest proportions of respondents to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

59% of respondents said the wildlife on the Islands had inspired their visit (compared with 58% and 47% during 2015 and 2014 respectively), 32% said the history of the Isles of Scilly (the same proportion as during 2015 and compared with 23% during 2014) and 18% said their friends or relatives who live on the Islands (20% in each case during 2015 and 2014).

22% 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.

What inspired visit to the Isles of Scilly 2014-2016



Base 2,300

90% of first time visitors were inspired to visit the Islands because of the scenery and 79% by the peace and quiet.

	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	92%	85%	80%	92%	91%	92%	90%	92%	94%	92%	81%	85%	93%	92%
Peace & Quiet	88%	63%	78%	88%	87%	82%	79%	90%	91%	87%	78%	78%	88%	93%
History	31%	33%	37%	34%	30%	33%	29%	32%	34%	30%	25%	27%	32%	32%
Event/Festival	6%	5%	6%	7%	5%	9%	4%	7%	5%	6%	8%	6%	6%	6%
Beaches	71%	58%	55%	67%	75%	57%	63%	74%	78%	65%	56%	58%	71%	79%
Friends/Relatives	18%	8%	16%	16%	19%	13%	11%	21%	19%	17%	16%	10%	17%	25%
Wildlife	60%	43%	57%	62%	56%	68%	56%	60%	63%	58%	50%	52%	61%	61%
Child Friendly	14%	5%	12%	8%	17%	7%	6%	16%	18%	9%	5%	4%	12%	22%
Other	22%	19%	24%	22%	21%	20%	19%	23%	21%	23%	21%	20%	23%	20%

 Analysis segment ranking the individual factor the highest

Information Sourcing

islands
partnership



The largest proportion of visitors (44%) 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, 44% of respondents said from a previous visit (49% 2015) and 26% from a personal recommendation (20% 2015), including 39% of first time visitors (38% 2015).

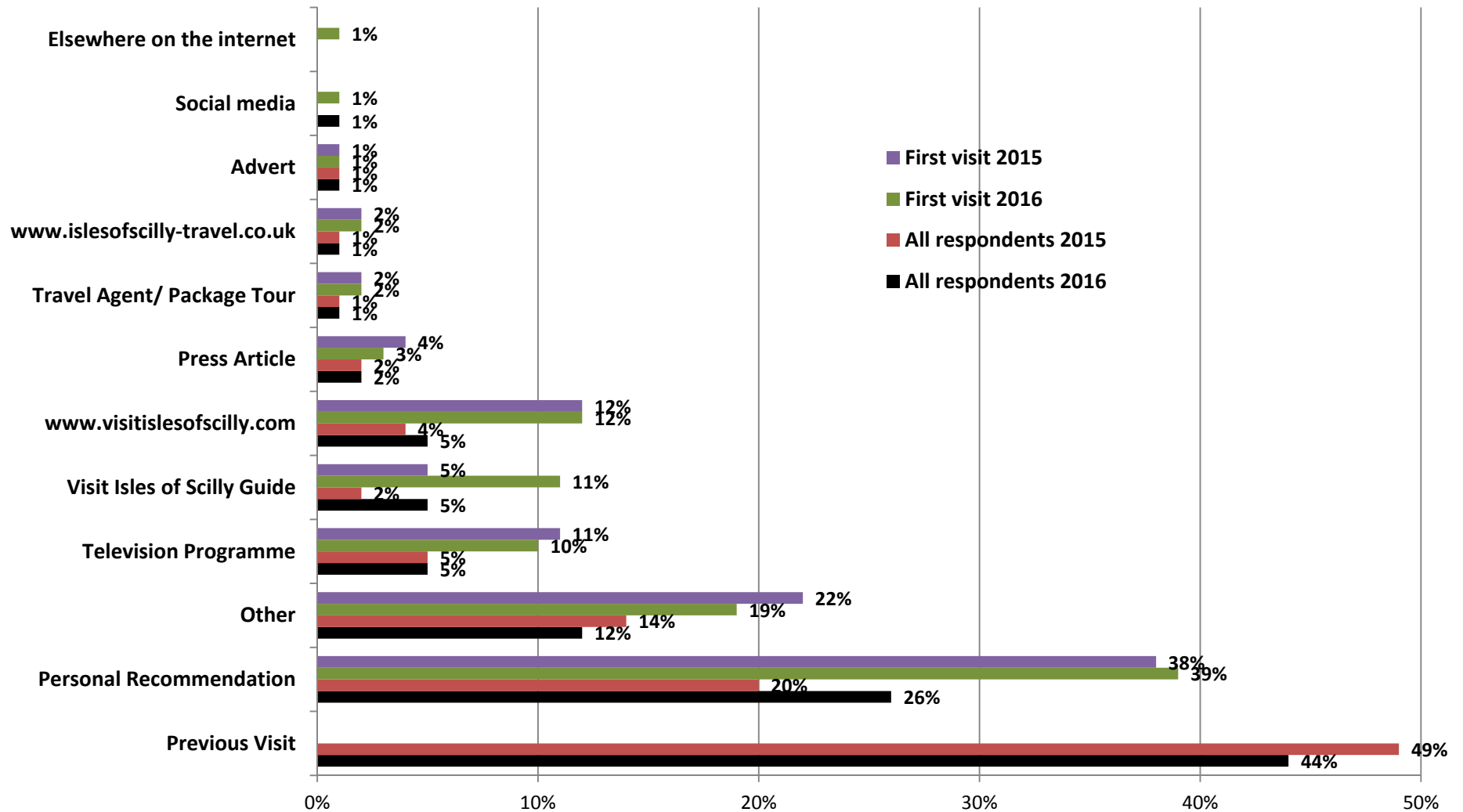
12% of first time visitors had initially been prompted to visit by the www.visitislesofscilly.com website (the same proportion as during 2015) and/or a similar proportion (11%) by the Visit Isles of Scilly Guide (5% 2015) 10% of first time visitors to the Islands had initially been prompted to visit by a television programme (11% 2015).

The results by segment are shown on page 41. 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 (10 respondents), the social media sites used (1%) and the full list of the other information sources used please refer to the appendices which accompany his report.

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

Initial prompt to visit the Isles of Scilly 2015-2016



62% of repeat visitors were initially prompted to visit by their previous visit to the Islands.
39% 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	44%	28%	40%	43%	44%	48%	2%	62%	46%	45%	36%	29%	44%	52%
Personal Recommendation	26%	20%	25%	26%	25%	26%	39%	20%	25%	25%	30%	33%	25%	23%
Other	12%	19%	15%	12%	12%	13%	19%	9%	10%	14%	17%	15%	12%	11%
Television Programme	5%	3%	8%	6%	6%	1%	10%	3%	6%	5%	3%	4%	6%	5%
Visit Isles of Scilly Guide	4%	8%	2%	5%	4%	3%	11%	2%	5%	3%	5%	4%	5%	3%
www.visitislesofscilly.com	4%	6%	4%	4%	5%	5%	12%	1%	4%	4%	6%	9%	4%	3%
Press Article	2%	-	2%	2%	2%	3%	3%	1%	2%	2%	1%	1%	2%	2%
Travel Agent/Package Tour	1%	4%	2%	1%	1%	2%	2%	-	-	1%	1%	1%	1%	-
www.islesofscilly-travel.co.uk	1%	3%	-	1%	1%	1%	2%	-	1%	1%	1%	1%	1%	-
Advert	-	4%	-	-	1%	-	1%	-	1%	-	-	-	-	1%
Social media	-	3%	-	1%	1%	1%	1%	-	-	-	1%	1%	-	-
Elsewhere on the internet	-	2%	-	-	1%	1%	1%	-	-	-	-	-	1%	-
Radio	-	-	2%	-	-	-	-	-	-	-	-	-	-	-

Analysis segment ranking the individual factor the highest

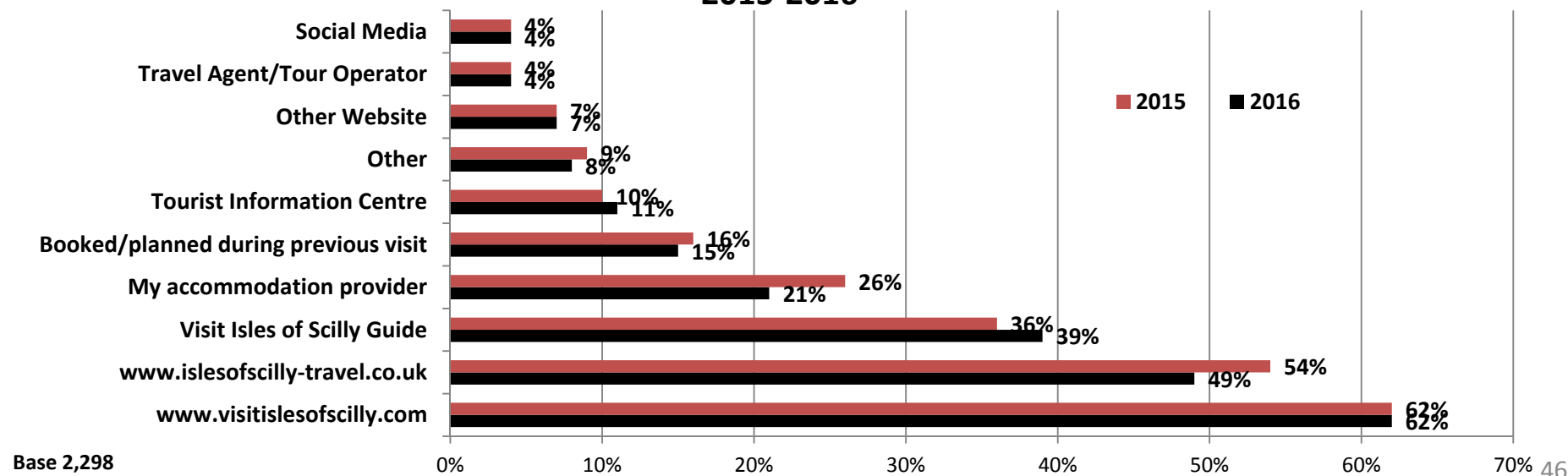
The www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites had been used by 62% and 49% of respondents respectively when planning and booking their visit to the Isles of the Islands.

Respondents were asked what information sources they had used when planning and booking their visit to the Isles of Scilly. The www.visitislesofscilly.com and www.islesofscilly-travel.co.uk websites had been used by 62% and 49% of respondents respectively (62% and 54% during 2015 respectively).

39% of respondents had used the Visit Isles of Scilly brochure (36% 2015) whilst 21% said they had sourced information from their accommodation provider (26% 2015).

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 (7%), the social media sites used (4%) and the full list of the other information sources used to plan and book please refer to the appendices which accompany his report.

Sources of information used when planning and booking visit to the Isles of Scilly 2015-2016



The www.visitislesofscilly.com website was used by 62% and 77% of staying and first time visitors respectively when planning and booking their visit to the Islands. The www.islesofscilly-travel.co.uk website was used by 49% and 52% of staying and repeat visitors respectively. 40% of staying visitors had used the Visit Isles of Scilly Guide.

	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	62%	54%	49%	59%	65%	56%	77%	55%	61%	64%	62%	68%	67%	51%
www.islesofscilly-travel.co.uk	49%	46%	51%	46%	51%	47%	42%	52%	52%	46%	40%	42%	51%	49%
Visit Isles of Scilly Guide	40%	32%	37%	41%	39%	29%	54%	33%	42%	37%	34%	37%	45%	31%
My accommodation provider	22%	5%	12%	22%	21%	22%	12%	25%	24%	21%	15%	15%	22%	26%
Booked/planned during previous visit	15%	3%	14%	15%	14%	9%	2%	20%	18%	13%	7%	4%	10%	30%
Tourist Information Centre	11%	12%	18%	11%	11%	9%	14%	10%	10%	11%	15%	14%	10%	10%
Other	8%	7%	14%	9%	7%	12%	7%	8%	8%	6%	13%	10%	8%	7%
Other website	7%	3%	6%	6%	7%	11%	7%	7%	8%	7%	6%	7%	7%	7%
Travel Agent/Tour Operator	4%	10%	2%	4%	4%	7%	8%	2%	3%	5%	6%	6%	4%	1%
Social media	4%	5%	6%	3%	4%	2%	3%	4%	4%	3%	5%	5%	3%	4%

Analysis segment ranking the individual factor the highest

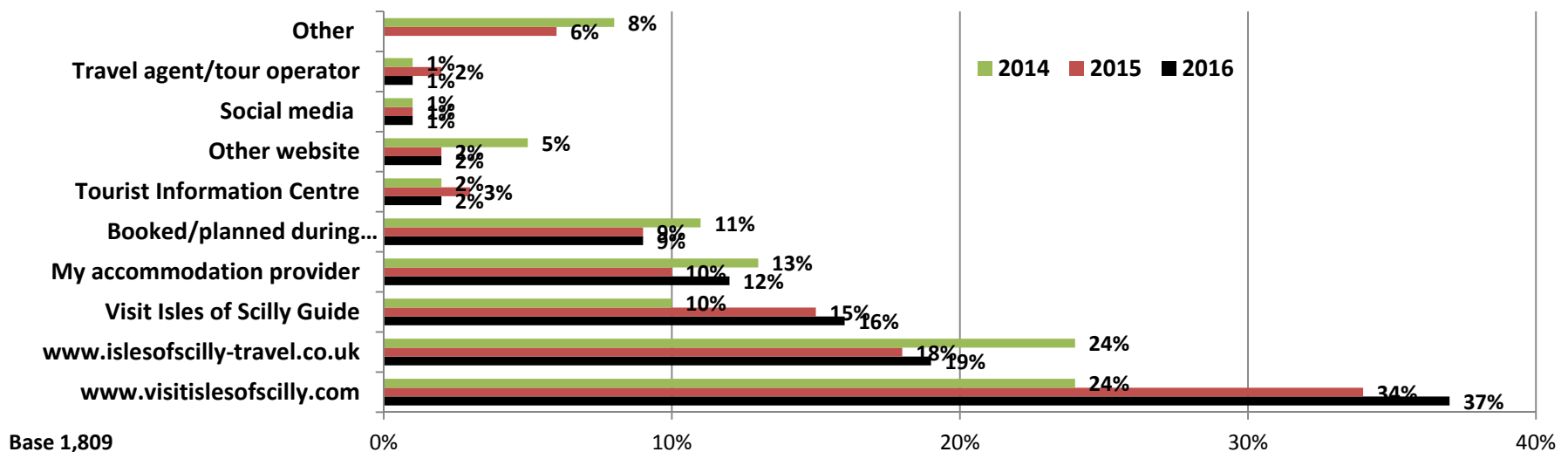
37% of respondents considered the www.visitislesofscilly.com website most useful to them when planning and booking their visit to the Isles of Scilly.

Respondents were asked what information sources they considered most useful when planning and booking their visit to the Isles of Scilly. 37% of respondents said the www.visitislesofscilly.com website was most useful (34% and 24% during 2015 and 2014 respectively) and 19% said the www.islesofscilly-travel.co.uk website (18% 2015 and 24% 2014).

A further 16% of respondents said the Visit Isles of Scilly brochure (15% and 10% during 2015 and 2014 respectively) whilst 12% said their accommodation provider (10% 2015 and 13% 2014) and a similar proportion (9%) said they had booked/planned their trip during a previous visit to the Islands (the same proportion as 2015 and compared with 11% during 2014).


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

Most useful information source when planning and booking visit to the Isles of Scilly 2014-2016



The www.visitislesofscilly.com website was found most useful by 37% and 38% of staying and repeat visitors respectively. The www.islesofscilly-travel.co.uk website was found most useful by 22% and 21% of day and first time visitors respectively.

	STAYING	DAY	JAN-MAR	APR-JUN	JUL-SEPT	OCT-DEC	FIRST TIME	REPEAT	MAIN	SECOND	SHORT	2-4 DAYS	5-7 DAYS	8+ DAYS
www.visitislesofscilly.com	37%	34%	27%	38%	36%	37%	35%	38%	37%	37%	35%	35%	38%	35%
www.islesofscilly-travel.co.uk	19%	22%	22%	19%	19%	24%	21%	19%	19%	18%	23%	23%	19%	18%
Visit Isles of Scilly Guide	16%	15%	22%	16%	16%	10%	16%	16%	16%	18%	12%	11%	17%	16%
My accommodation provider	11%	18%	5%	11%	12%	13%	13%	11%	12%	11%	13%	15%	10%	12%
Booked/planned during previous visit	10%	3%	11%	9%	9%	10%	10%	9%	9%	10%	11%	12%	10%	9%
Tourist Information Centre	2%	1%	3%	3%	2%	2%	1%	3%	2%	2%	1%	1%	2%	2%
Other website	2%	4%	3%	1%	2%	3%	1%	2%	2%	1%	1%	1%	2%	2%
Social media	2%	-	5%	1%	2%	-	1%	1%	2%	1%	1%	1%	1%	3%
Travel Agent/Tour Operator	1%	4%	3%	1%	1%	2%	1%	1%	1%	1%	2%	1%	1%	1%

 Analysis segment ranking the individual factor the highest

The majority of those on social media (85%) used Facebook on a regular basis.

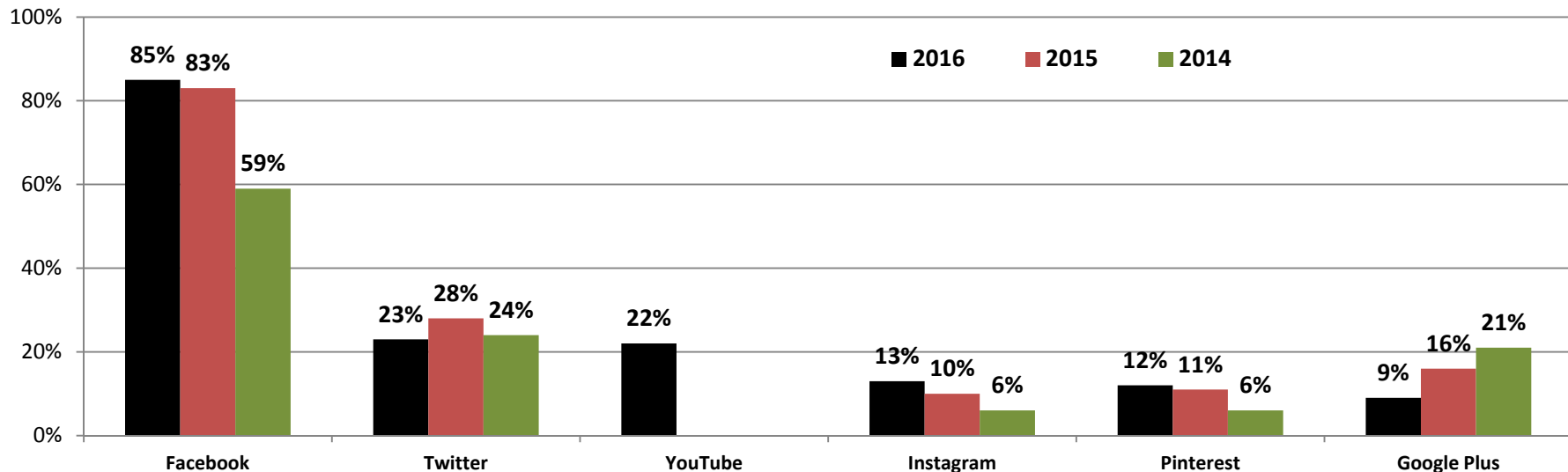
Respondents were asked what social media sites they regularly used. 33% of all respondents said they were not on social media and these respondents have been removed from the results below to allow for comparisons with the previous survey years' data to be made.

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

A further 23% of respondents (28% and 24% during 2015 and 2014 respectively) regularly used Twitter, 22% YouTube (not asked during 2015 and 2014), 13% Instagram (10% and 6% during 2015 and 2014 respectively), 12% Pinterest (11% 2015 and 6% 2014) and 9% Google Plus (16% 2015 and 21% 2014). There was little variation in the results according to analysis segment.

To see the list of other social media used regularly (5%) please refer to the appendices which accompany this report

Social media sites regularly used 2014-2016



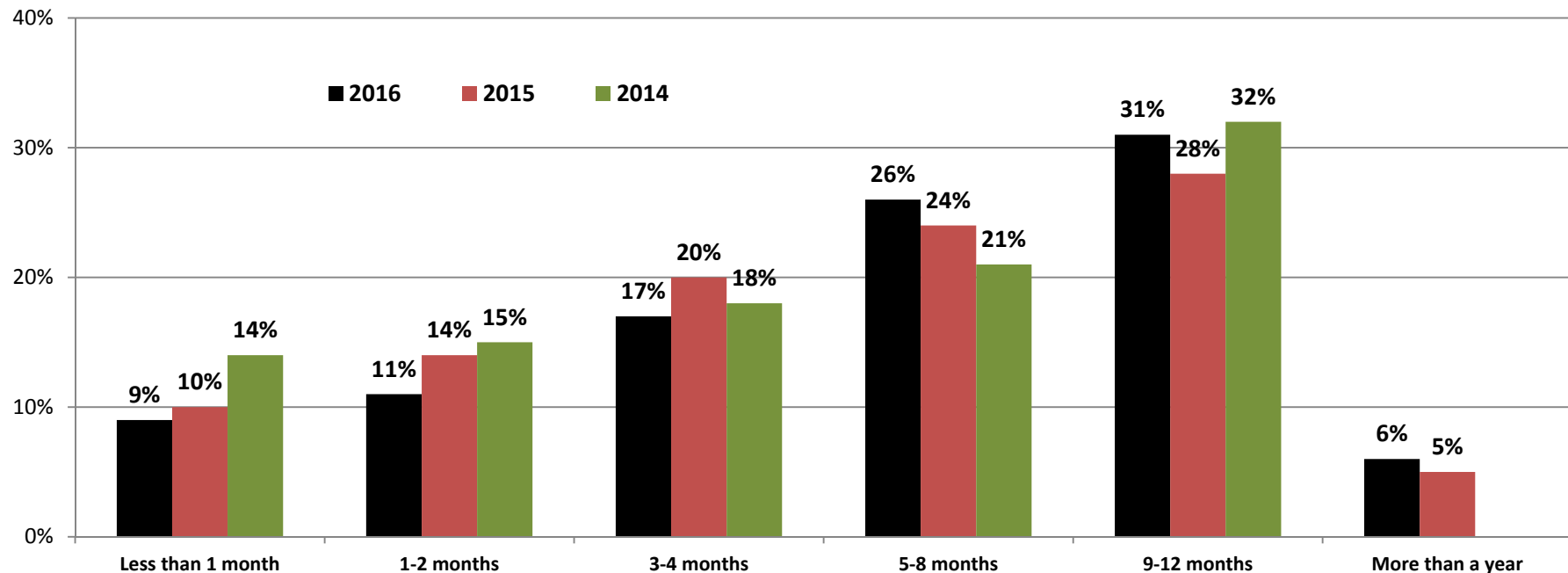
**37% of respondents had booked their holiday to the Islands 9 months or more in advance.
20% had booked up to 2 months before their visit.**

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

17% of respondents had booked 3-4 months in advance (20% and 18% during 2015 and 2014 respectively), 11% 1-2 months in advance (14% 2015 and 15% 2014) and just 9% less than one month before their actual holiday to the Islands (10% and 14% during 2015 and 2014 respectively).

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

Booking lead times 2014-2016



Staying visitors, those visiting the Islands during July to September, previous visitors, those on their main holiday, those arriving by Skybus and Scillonian 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 (40%), those visiting the Islands during July to September (40%), previous visitors (47%), those on their main holiday (47%), those arriving by Skybus and Scillonian (39% and 37% respectively) and those staying for 8 or more days (61%) were the most likely to book their visit to the Isles of Scilly 9 months or more in advance.

Day visitors (53%), those arriving by private transport (44%) and those staying for 2-4 nights (20%) were the most likely to book less than 1 month before their actual visit.

Booking lead times by analysis segment 2016	Less than 1 month	1-2 months	3-4 months	5-8 months	9-12 months	More than a year	Booking lead times by analysis segment 2016	Less than 1 month	1-2 months	3-4 months	5-8 months	9-12 months	More than a year
STAYING	7%	11%	17%	26%	33%	7%	SKYBUS	5%	11%	18%	27%	32%	7%
DAY	53%	18%	14%	9%	6%	1%	SCILLONIAN	11%	12%	15%	25%	31%	6%
JAN-MAR	16%	18%	22%	16%	22%	4%	PRIVATE	44%	13%	22%	13%	9%	
APR-JUN	6%	7%	20%	31%	31%	6%	CRUISE	21%	7%	29%	29%	14%	
JUL-SEP	10%	13%	13%	23%	33%	7%	OTHER TRANSPORT	8%	10%	17%	24%	35%	7%
OCT-DEC	11%	14%	28%	24%	19%	4%	2-4 days	20%	26%	25%	21%	7%	1%
FIRST TIME	14%	15%	24%	31%	14%	3%	5-7 days	5%	10%	19%	29%	30%	6%
REPEAT	7%	10%	14%	23%	39%	8%	8+ days	3%	5%	8%	23%	50%	11%
MAIN	4%	7%	13%	27%	40%	8%							
SECOND	6%	14%	18%	28%	28%	5%							
SHORT	19%	24%	29%	20%	7%	2%							

The Travel Experience

islands
partnership

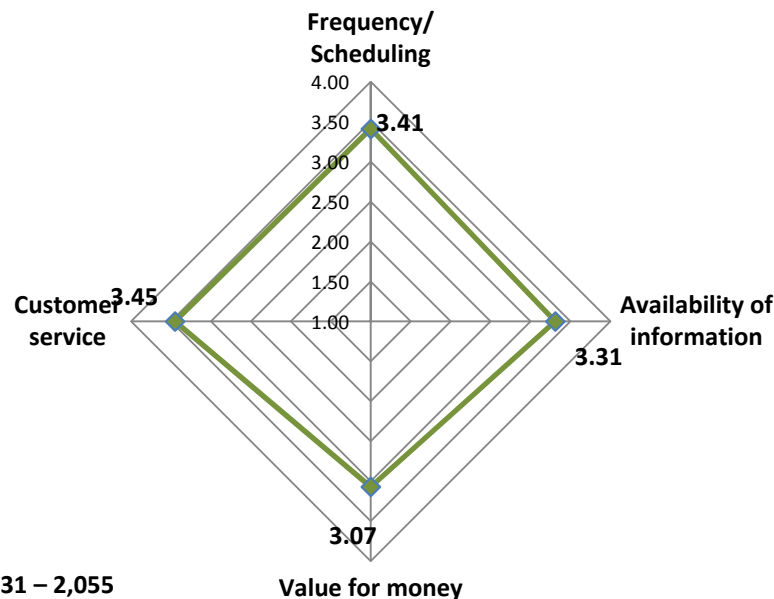


All factors related to satisfaction with inter-island boat travel received good average scores of between 3.07 and 3.45 out of a max. of 4.00.

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.

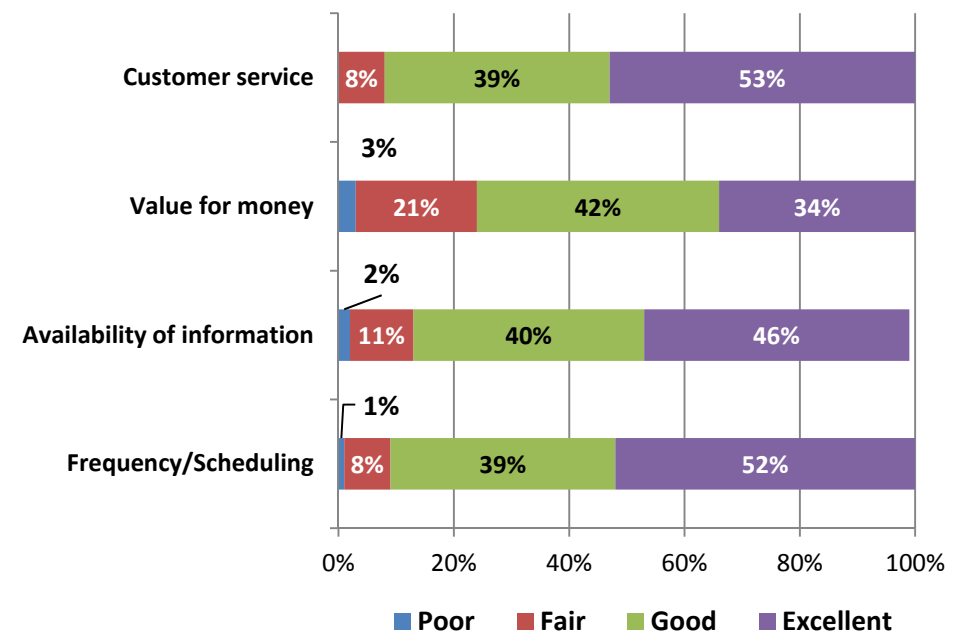
All four indicators received good average scores of between 3.07 and 3.45. The highest level of satisfaction was with customer service (3.45), followed by frequency/scheduling (3.41) and the availability of information (3.31) and was lowest for the value for money (3.07). The results by analysis segment are shown in the table overleaf.

Satisfaction with inter-island boat travel



Base 2,031 – 2,055

Satisfaction with inter-island boat travel



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

On the whole, satisfaction levels with inter-island boat travel were higher amongst staying visitors, those visiting the Islands during April to June, amongst repeat visitors, those on their main holiday, those staying on St. Agnes and those travelling to the Islands via the Skybus or other transport and those staying 5-7 nights.

Mean satisfaction score out of a max. of 4.00	Frequency/Scheduling	Availability of information	Value for money	Customer service
STAYING	3.42	3.31	3.07	3.45
DAY	3.18	3.12	3.00	3.28
JAN-MAR	3.26	3.03	3.03	3.27
APR-JUN	3.44	3.33	3.12	3.45
JUL-SEP	3.41	3.31	3.03	3.45
OCT-DEC	3.38	3.29	3.06	3.47
FIRST TIME	3.34	3.19	3.13	3.42
REPEAT	3.44	3.35	3.04	3.46
MAIN	3.45	3.32	3.08	3.47
SECOND	3.36	3.30	3.03	3.42
SHORT	3.35	3.25	3.09	3.38
ST MARY'S	3.48	3.36	3.15	3.47
ST AGNES	3.31	3.27	2.96	3.41
BRYHER	3.15	3.19	2.69	3.23
TRESCO	3.17	3.17	2.80	3.35
ST MARTIN'S	2.96	2.89	2.47	3.27
SKYBUS	3.45	3.34	3.10	3.45
SCILLONIAN	3.39	3.29	3.04	3.46
PRIVATE	2.81	2.57	2.62	2.91
CRUISE	3.00	3.00	3.00	3.00
OTHER TRANSPORT	3.39	3.31	3.18	3.47
2-4 NIGHTS	3.31	3.21	3.09	3.39
5-7 NIGHTS	3.44	3.33	3.12	3.46
8+ NIGHTS	3.42	3.30	2.96	3.45

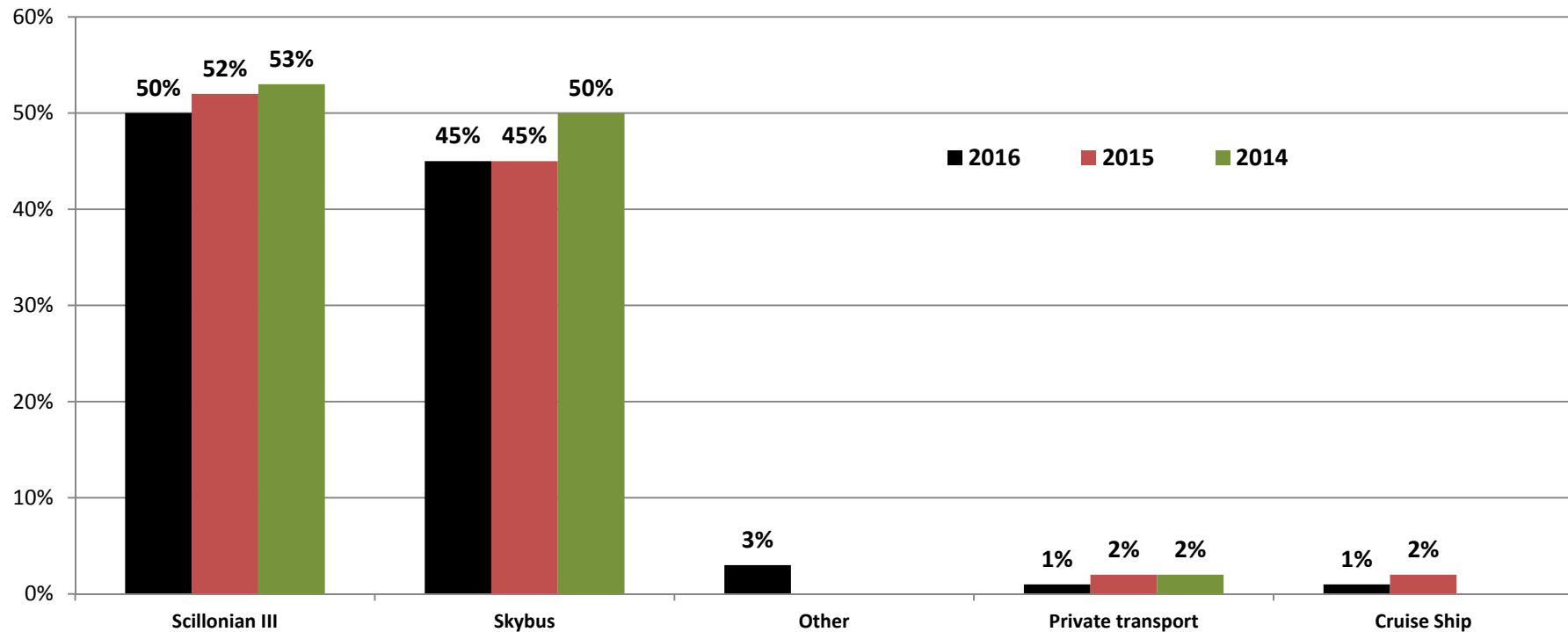
Analysis segment ranking the individual factor the highest

50% of respondents had travelled to the Islands on the Scillonian and a further 45% via the Skybus.

50% of respondents had travelled to the Islands on the Scillonian (52% and 53% during 2015 and 2014 respectively) and a further 45% via the Skybus (the same proportion as during 2015 and compared with 50% during 2014).

The results by analysis segment are shown overleaf.

How travelled to the Islands 2014-2016



Base 2,256

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

48% of repeat visitors, 51% of those on a short break, 67% of those staying on Tresco and 48% of those staying 8+ days had arrived on the Islands by Skybus.

48% of repeat visitors, 51% of those on a short break, 67% of those staying on Tresco and 48% of those staying 8+ days had arrived on the Islands by Skybus.

11% of day visitors arrived on a cruise ship.

How travelled to the Islands by analysis segment 2016	Skybus	Scillonian III	Private Boat	Private Plane	Cruise Ship	Other	How travelled to the Islands by analysis segment 2016	Skybus	Scillonian III	Private Boat	Private Plane	Cruise Ship	Other
STAYING	46%	50%	1%			3%	ST MARY'S	45%	50%	1%			4%
DAY	28%	54%	3%	1%	11%	3%	ST AGNES	25%	63%	6%			6%
JAN-MAR	76%	20%		2%		2%	BRYHER	39%	56%	3%	1%		1%
APR-JUN	49%	46%	1%		1%	4%	TRESCO	67%	23%	5%	1%	1%	3%
JUL-SEP	41%	54%	1%		1%	3%	ST MARTIN'S	30%	63%	3%		1%	3%
OCT-DEC	52%	45%				3%	2-4 days	43%	50%	3%	1%		3%
FIRST TIME	37%	56%	2%	1%	2%	3%	5-7 days	46%	51%	1%			3%
REPEAT	48%	47%	1%			3%	8+ days	48%	48%				4%
MAIN	44%	53%				3%							
SECOND	49%	46%	2%			3%							
SHORT	51%	42%	2%	1%		4%							

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

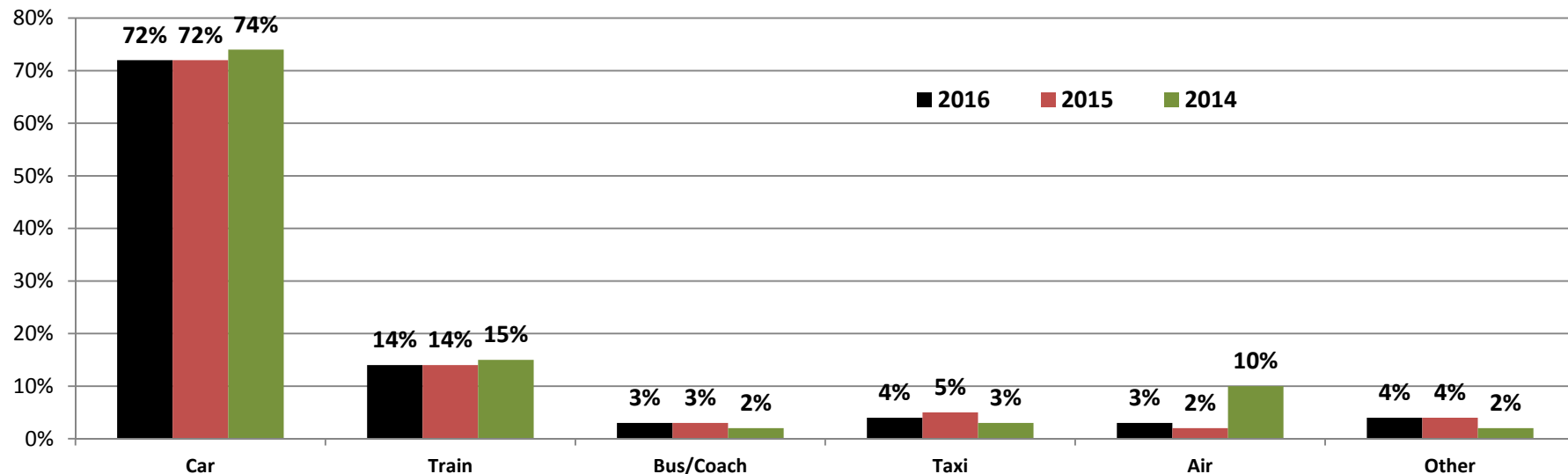
Around three quarters of respondents (72%) had reached their connecting flight or boat to the Islands by car (the same proportion as during 2015 and compared with 74% during 2014).

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

There was little variation in the results according to segment.

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

How reached connecting flight/boat to the Islands 2014-2016



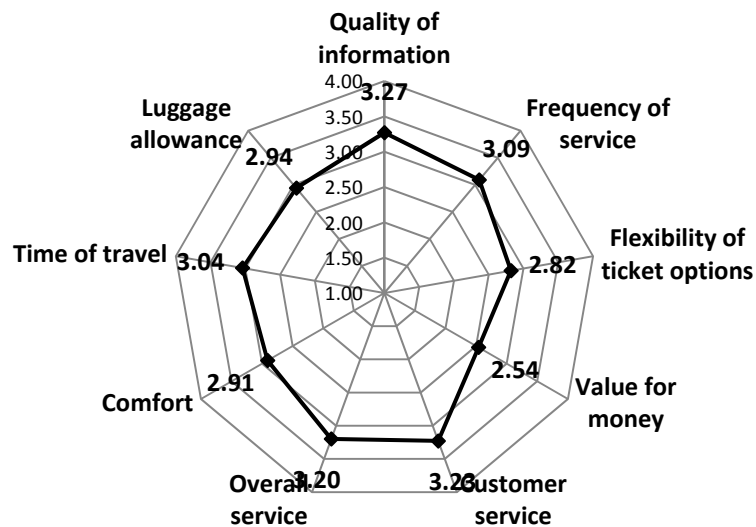
The quality of the travel information, frequency of service, customer service and overall service all received good average scores of between 3.04 and 3.27 out of 4.00.

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, overall service and time of travel all received good average scores of between 3.04 and 3.27. The flexibility of ticket options, value for money of travel, comfort of travel and luggage allowance all received lower average scores of between 2.54 and 2.94 out of 4.00. The highest level of satisfaction was with the quality of travel information (3.27) and was lowest for value for money of travel to the Islands (2.54).

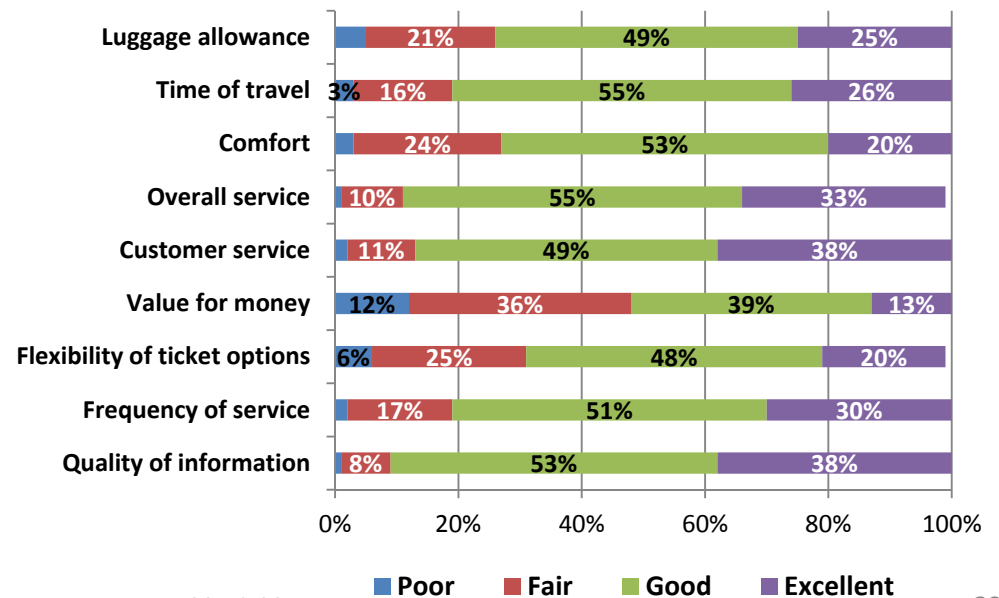
The results by segment are shown in the table overleaf. Overall, satisfaction levels amongst visitors regarding their travel experience were higher than during 2015 but remained slightly lower than during 2014.

Satisfaction with travel experience



Base 1,981-2,085

Satisfaction with travel experience



Base 1,981-2,085

On the whole, satisfaction levels with the travel experience were higher amongst day visitors, those visiting the Islands during July to September, amongst first time visitors, those on their main holiday of the year, those staying on St. Agnes, those travelling to the Islands via the Skybus and those staying 2-4 or 8+ nights.

Mean satisfaction score out of a max. of 4.00	Quality of information	Frequency of service	Flexibility of ticket options	Value for money	Customer service	Overall service	Comfort	Time of travel	Luggage allowance
STAYING	3.24	2.93	2.80	2.68	3.14	3.13	2.87	2.86	3.16
DAY	3.45	3.25	3.02	3.06	3.45	3.45	3.12	3.13	3.13
JAN-MAR	3.10	2.98	2.63	2.27	2.98	3.00	2.82	2.90	2.68
APR-JUN	3.28	3.11	2.82	2.51	3.21	3.20	2.90	3.06	2.91
JUL-SEP	3.28	3.08	2.83	2.57	3.25	3.22	2.93	3.03	2.96
OCT-DEC	3.29	3.13	2.78	2.55	3.24	3.16	2.90	3.06	2.97
FIRST TIME	3.26	3.04	2.88	2.72	3.27	3.26	3.01	3.07	3.04
REPEAT	3.28	3.11	2.80	2.47	3.22	3.18	2.87	3.03	2.90
MAIN	3.29	3.12	2.84	2.53	3.24	3.20	2.93	3.03	2.95
SECOND	3.23	3.04	2.79	2.46	3.20	3.18	2.87	3.04	2.89
SHORT	3.22	3.02	2.79	2.57	3.18	3.17	2.88	3.03	2.98
ST MARY'S	3.28	3.09	2.84	2.54	3.23	3.22	2.92	3.04	2.96
ST AGNES	3.19	3.13	2.92	2.57	3.27	3.25	2.91	3.06	3.14
BRYHER	3.15	2.99	2.70	2.46	3.09	3.06	2.78	2.86	2.75
TRESCO	3.19	3.03	2.61	2.30	3.20	3.06	2.80	2.99	2.71
ST MARTIN'S	3.18	2.98	2.71	2.37	3.11	3.10	2.86	2.93	2.89
SKYBUS	3.30	3.25	2.84	2.37	3.32	3.27	2.95	3.23	2.70
SCILLONIAN	3.25	2.94	2.80	2.70	3.15	3.15	2.88	2.86	3.16
2-4 NIGHTS	3.23	3.03	2.81	2.61	3.18	3.19	2.94	3.09	3.10
5-7 NIGHTS	3.26	3.09	2.81	2.52	3.21	3.19	2.89	3.03	2.95
8+ NIGHTS	3.29	3.09	2.81	2.46	3.26	3.20	2.91	3.02	2.84
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

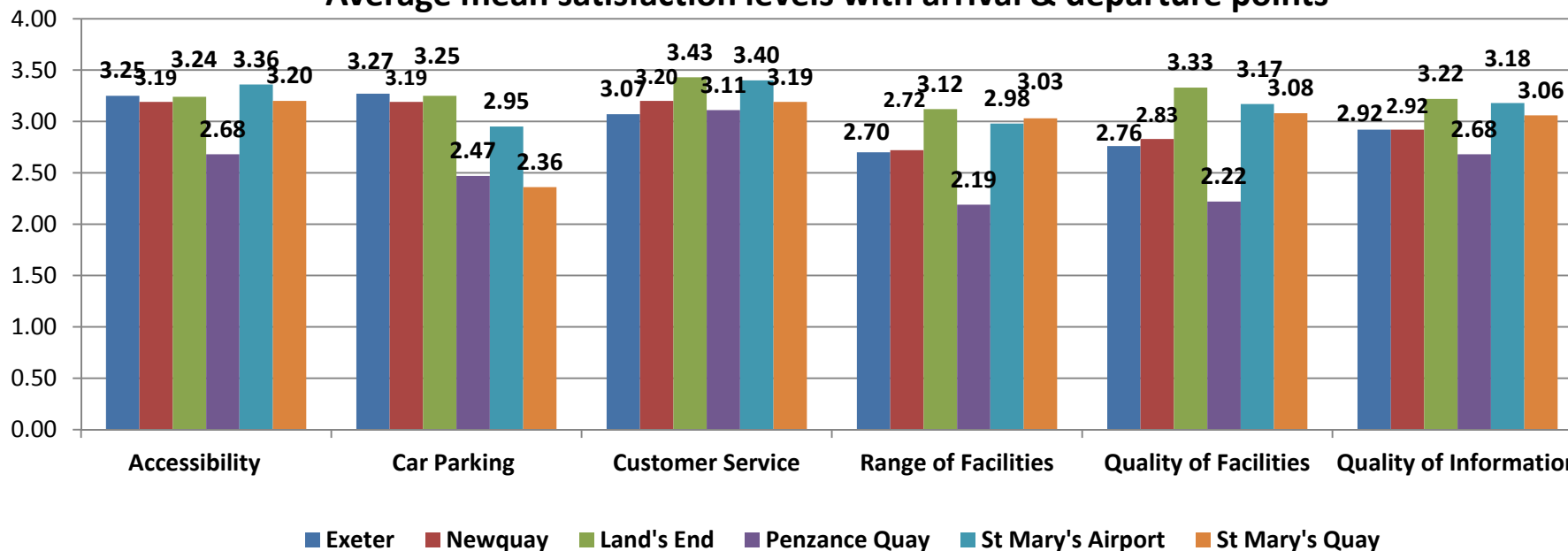
Analysis segment ranking the individual factor the highest

Land's End received the highest levels of satisfaction amongst visitors across all categories except accessibility and Penzance Quay the lowest.

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

Visitors' satisfaction levels in terms of accessibility were highest at St. Mary's Airport (3.36) and lowest at Penzance Quay (2.68). In terms of car parking, they were highest at Exeter (3.27) and lowest at St. Mary's Quay (2.36). Visitors' satisfaction levels in terms of customer service were highest at Land's End (3.43) and lowest at Exeter (3.07) and in terms of the range of facilities were highest at Land's End (3.12) and lowest at Penzance Quay (2.19). Visitors' satisfaction levels in terms of the quality of facilities were also highest at Land's End (3.33) and lowest again at Penzance Quay (2.22) and finally, in terms of the quality of information, they were highest at Land's End (3.22) and lowest at Penzance Quay (2.68).

Average mean satisfaction levels with arrival & departure points



Base 1,597-1,680

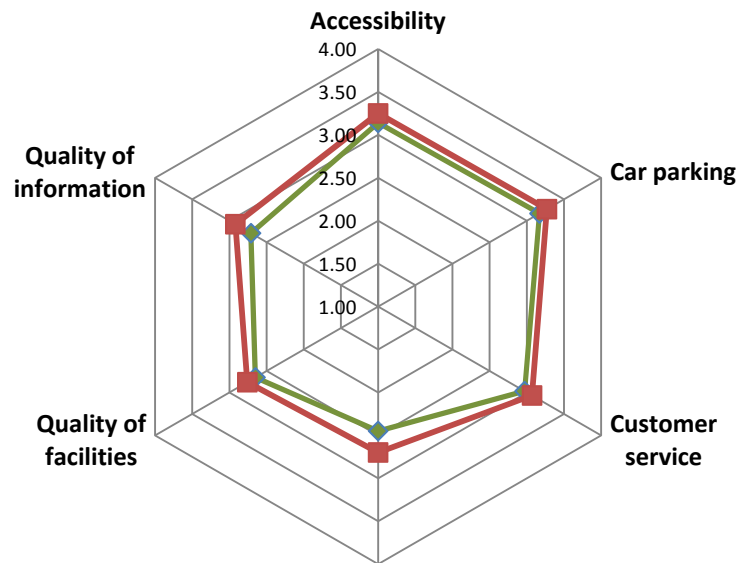
A number of respondents provided a comment about their arrival/departure points and these can be found in the appendices which accompany this report.

Exeter satisfaction scores in 2016 were higher than 2015 across all indicators.

All average scores at Exeter increased in 2016 compared to 2015, with accessibility, car parking and customer service receiving good average scores of 3.25, 3.27 and 3.07 respectively. All other indicators received average scores of 2.92 or lower – the lowest being for the range of facilities at 2.7 out of 4.00 with 36% of respondents rating this aspect as ‘poor’ or ‘fair’.

There was little variation in the results according to segment.

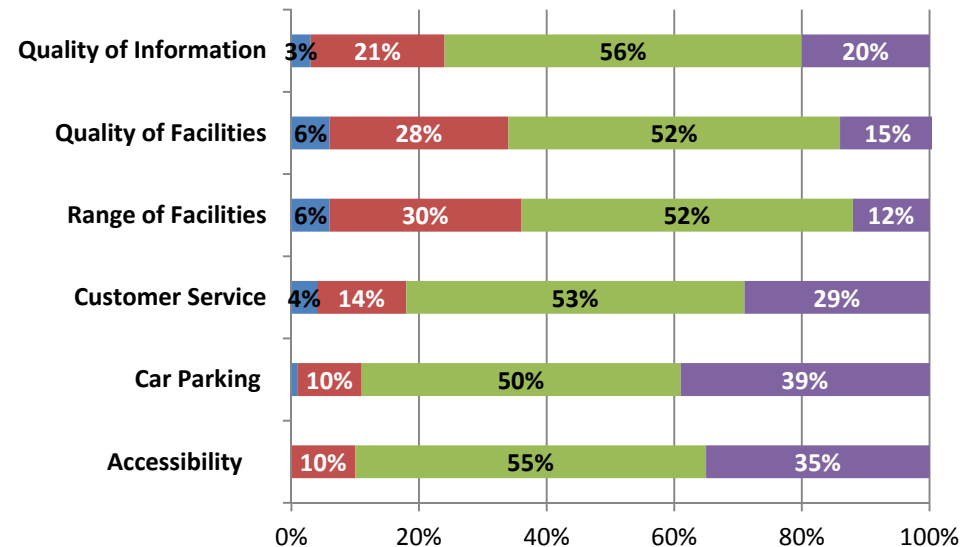
Satisfaction with arrival & departure points - EXETER



—◆— 2015 —■— 2016

Range of facilities

Satisfaction with arrival & departure points - EXETER



■ Poor ■ Fair ■ Good ■ Excellent

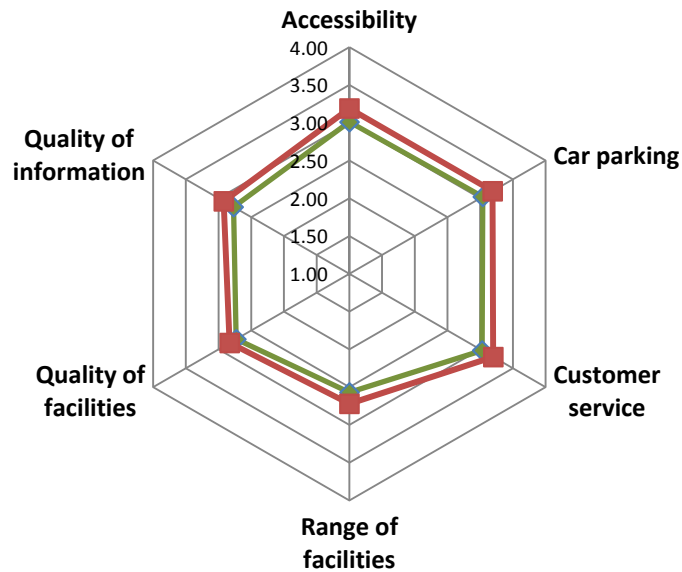
Exeter	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2016	3.25	3.27	3.07	2.7	2.76	2.92
2015	3.14	3.17	2.97	2.45	2.65	2.71

Newquay satisfaction scores in 2016 were higher than 2015 across all indicators.

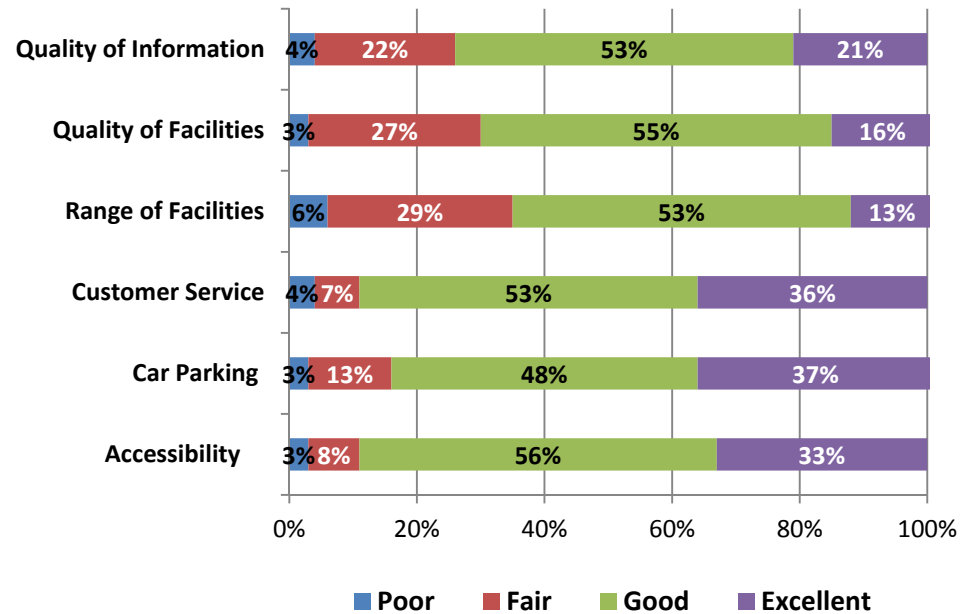
At Newquay, all factors saw increased satisfaction levels in 2016 compared to 2015. Three indicators received good average scores; 3.19 for accessibility, 3.19 for car parking and 3.2 for customer service. All other indicators received average scores of 2.92 or lower – the lowest being for the range of facilities at 2.72 out of 4.00 with 35% of respondents rating this aspect as ‘poor’ or ‘very poor’.

There was little variation in the results according to segment.

Satisfaction with arrival & departure points - NEWQUAY



Satisfaction with arrival & departure points - NEWQUAY



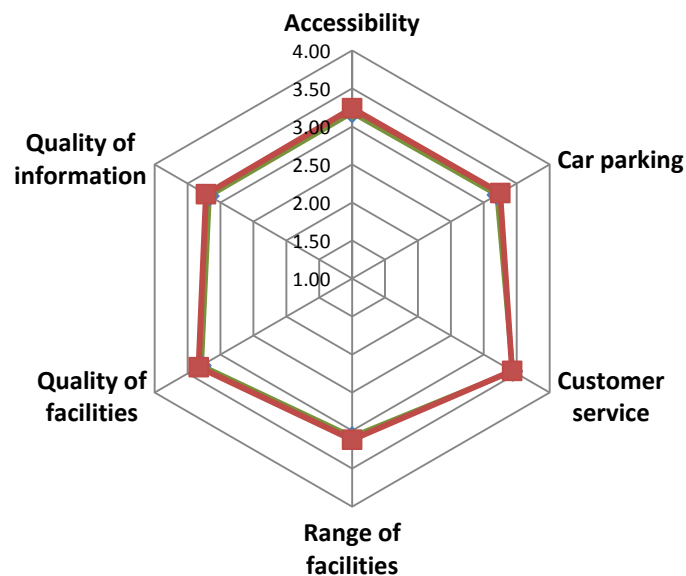
Newquay	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2016	3.19	3.19	3.2	2.72	2.83	2.92
2015	3.01	3.04	3.03	2.57	2.73	2.77

Five out of the six indicators witnessed increased satisfaction levels at Land's End in 2016 compared to 2015 with the exception of customer service which remained at a broadly similar level.

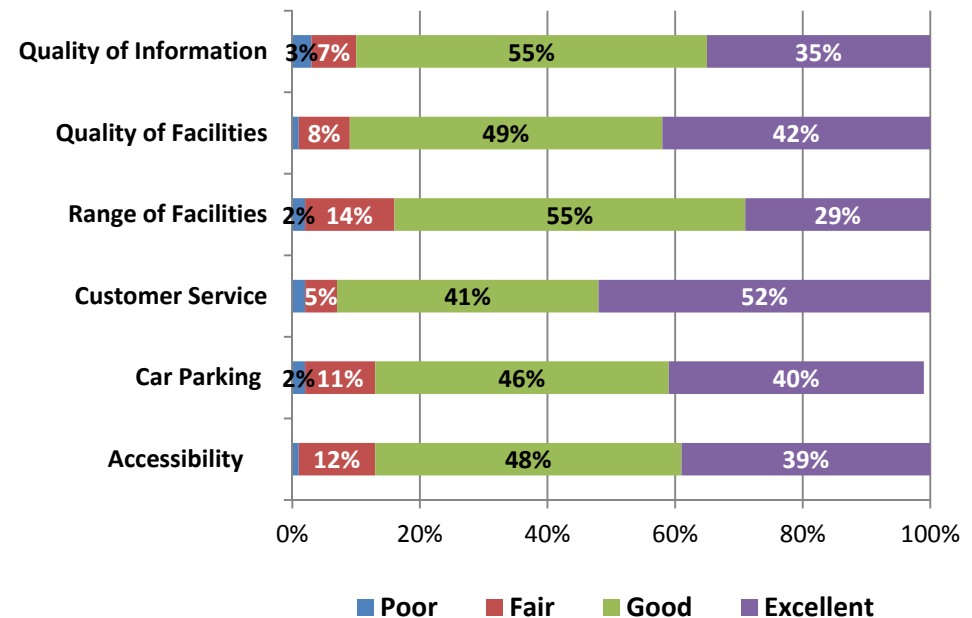
All six indicators for Land's End received good average scores of 3.12 or higher – the highest being for customer service (3.43) and the lowest for the range of facilities at 3.12 out of 4.00. Between 84% and 93% of respondents rated each of the indicators as 'good' or 'very good'.

There was little variation in the results according to segment.

Satisfaction with arrival & departure points – LAND'S END



Satisfaction with arrival & departure points – LAND'S END



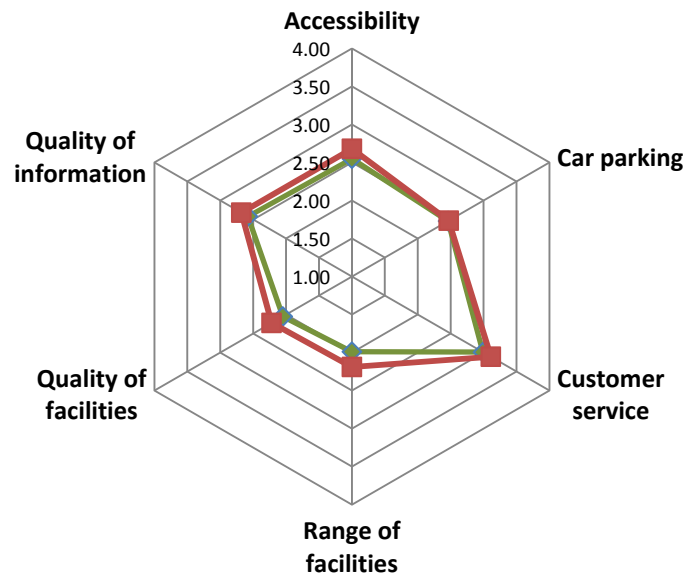
Land's End	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2016	3.24	3.25	3.43	3.12	3.33	3.22
2015	3.18	3.20	3.44	3.08	3.29	3.17

All six indicators for Penzance Quay in 2016 increased compared to 2015.

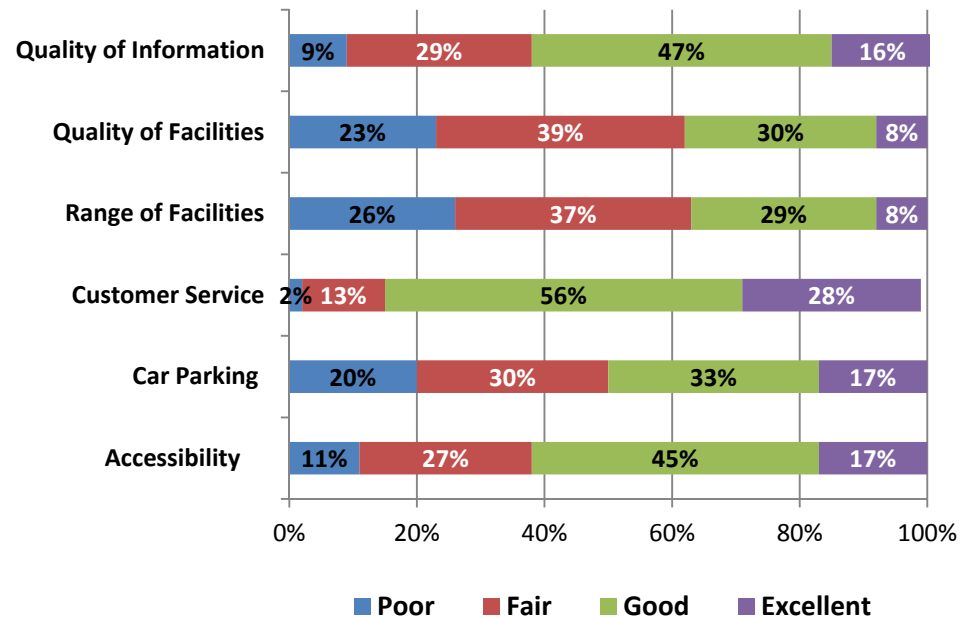
There were improvements across all indicators for Penzance Quay although the increase in car parking satisfaction was minimal and is probably best viewed as similar to 2015. Customer service received a good average score of 3.11 with the remaining five indicators receiving lower average scores of 2.68 or lower – the lowest being for the range of facilities at 2.19 out of 4.00 with 63% of respondents rating this indicator as ‘poor’ or ‘very poor’.

There was little variation in the results according to segment.

Satisfaction with arrival & departure points – PENZANCE QUAY



Satisfaction with arrival & departure points – PENZANCE QUAY



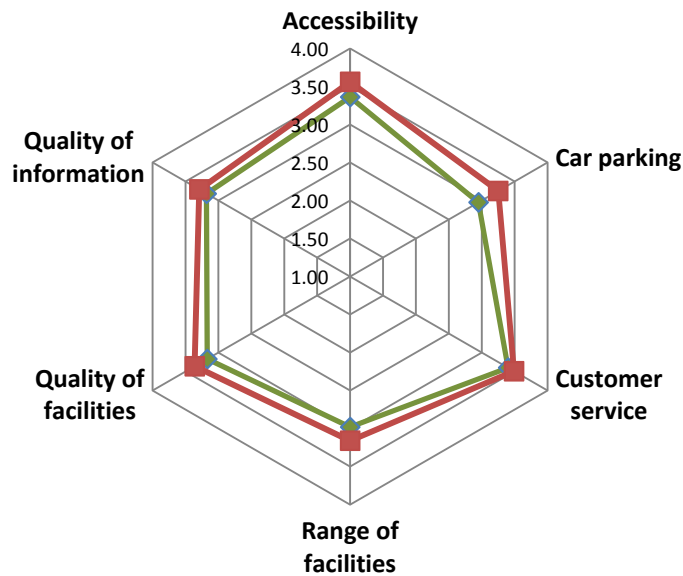
Penzance Quay	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2016	2.68	2.47	3.11	2.19	2.22	2.68
2015	2.55	2.46	2.99	1.99	2.05	2.58

All six indicators for St. Mary's Airport in 2016 increased compared to 2015.

At St. Mary's Airport all indicators witnessed increased satisfaction levels compared to 2015. All six indicators received good average scores of 3.16 or higher including accessibility (3.56), car parking (3.25), customer service (3.49), range of facilities (3.16), quality of facilities (3.36) and quality of information (3.29).

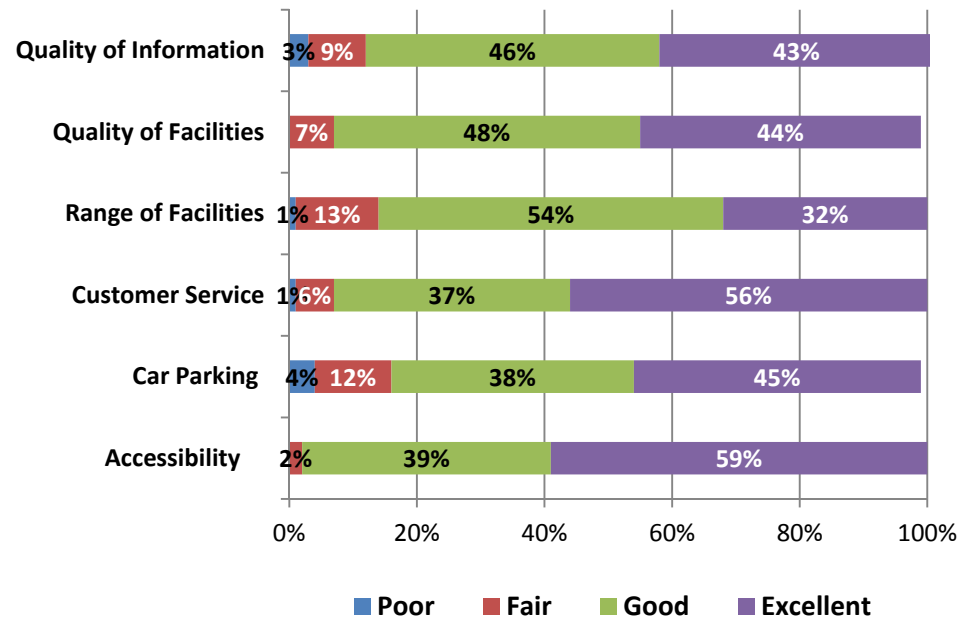
There was little variation in the results according to segment.

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



—◆— 2015 —■— 2016

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



■ Poor ■ Fair ■ Good ■ Excellent

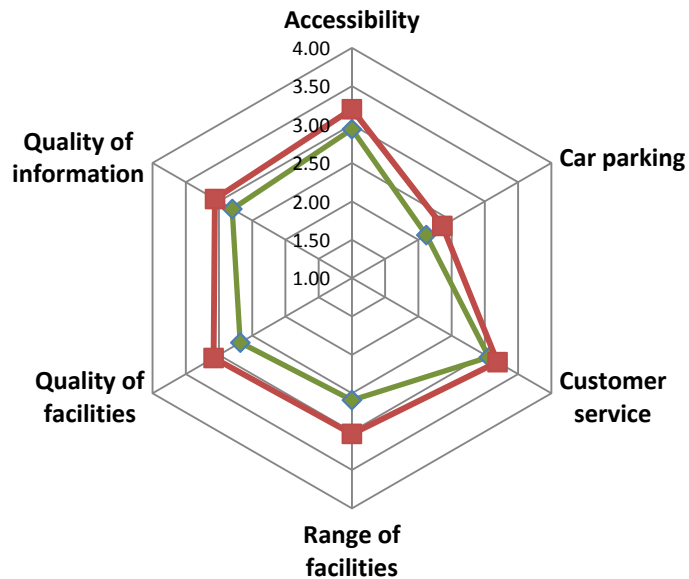
St. Mary's Airport	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2016	3.56	3.25	3.49	3.16	3.36	3.29
2015	3.36	2.95	3.40	2.98	3.17	3.18

All six indicators for St. Mary's Quay in 2016 increased compared to 2015.

At St. Mary's Quay all indicators also witnessed increased satisfaction levels compared to 2015. Accessibility, customer service, the range and quality of facilities and the quality of information all received a good average score of 3.03 out of 4.00 or higher. Car parking at the quay was rated the lowest (2.36) with 53% of respondents rating this indicator as 'poor' or 'very poor'.

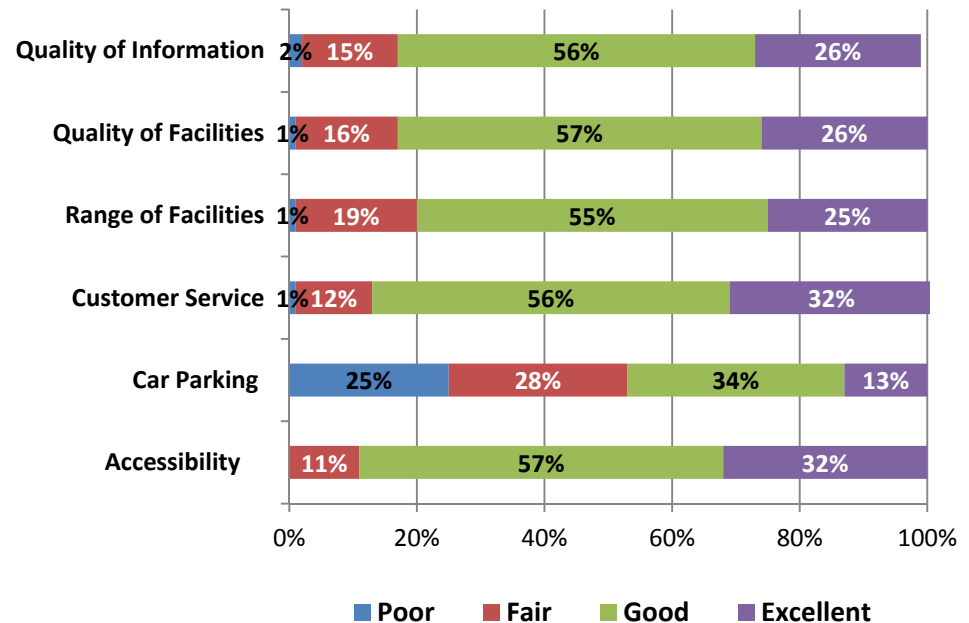
There was little variation in the results according to segment.

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



—◆— 2015 —■— 2016

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



St. Mary's Quay	Accessibility	Car parking	Customer service	Range of facilities	Quality of facilities	Quality of information
2016	3.2	2.36	3.19	3.03	3.08	3.06
2015	2.94	2.12	3.06	2.59	2.68	2.8

Just over three quarters of respondents (78%) included a stop over in the South West as part of their visit to the Isles of Scilly.

Just over three quarters of respondents (78%) included a stop over in the South West as part of their visit to the Isles of Scilly (including 79% of staying visitors). A further 3% lived outside of the region but did not include a stop over in their trip and 18% lived in the South West and also didn't include a stop over in their trip. There was little significant variation amongst the analysis segments for this question.

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

Approximately two thirds (68%) of those including an overnight stop stayed for one night before travelling on to the Isles of Scilly (67% Cornwall and 68% in other South West locations). 27% had a longer stay before going to Scilly, 3% had a longer stay upon returning from Scilly and 2% stayed for one night when returning from Scilly.

Visitors' Opinions

islands
partnership



Introduction

The 2016 Isles of Scilly Online Visitor Survey obtained visitors' satisfaction levels with a wide range of factors or indicators which together comprise the 'visitor experience'. Each factor, or indicator, was rated on a range of '1' to '4' scale where '1' = 'poor' (or the most negative response), '2' = 'fair', '3' = 'good', '4' = 'excellent' (or the most positive response), allowing a satisfaction 'score' (out of a maximum of four) to be calculated.

The areas explored in terms of satisfaction were:

- Accommodation
- Activities
- 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 very high.

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

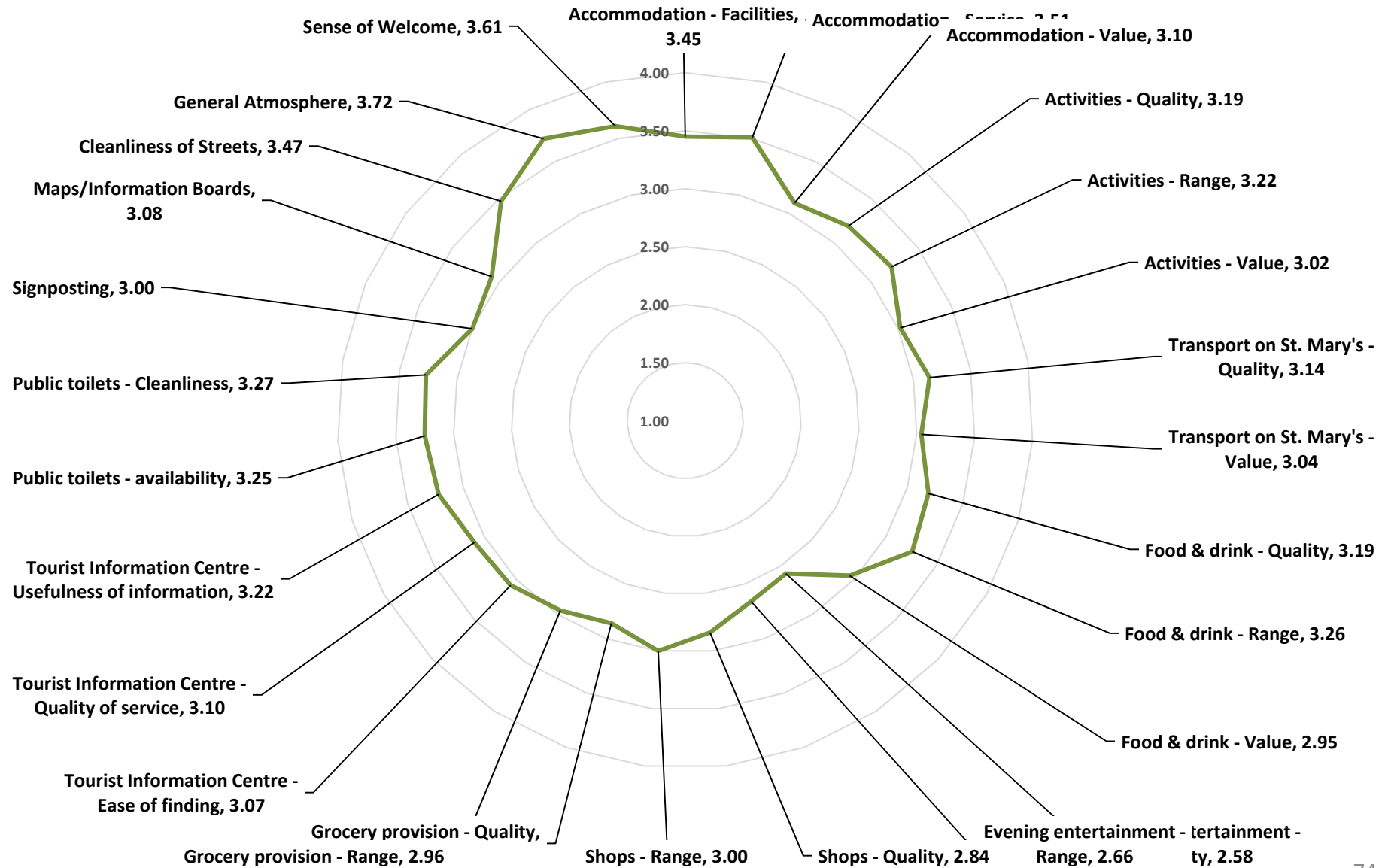
#	Indicator	Mean score	Ranking	#	Indicator	Mean score	Ranking
1	Accommodation – Facilities	3.45	5	16	Grocery provision – Quality	2.86	24
2	Accommodation – Service	3.51	3	17	Grocery provision – Range	2.96	22
3	Accommodation – Value	3.10	14	18	TIC- Ease of finding	3.07	17
4	Activities – Quality	3.19	11	19	TIC- Quality of service	3.10	15
5	Activities – Range	3.22	9	20	TIC- Usefulness of information	3.22	10
6	Activities – Value	3.02	19	21	Public toilets – availability	3.25	8
7	Transport on St. Mary's – Quality	3.14	13	22	Public toilets – Cleanliness	3.27	6
8	Transport on St. Mary's – Value	3.04	18	23	Signposting	3.00	21
9	Food & drink – Quality	3.19	12	24	Maps/Information Boards	3.08	16
10	Food & drink – Range	3.26	7	25	Cleanliness of Streets	3.47	4
11	Food & drink – Value	2.95	23	26	General Atmosphere	3.72	1
12	Evening entertainment – Quality	2.58	27	27	Sense of Welcome	3.61	2
13	Evening entertainment – Range	2.66	26				
14	Shops – Quality	2.84	25				
15	Shops – Range	3.00	20				

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

The highest levels of satisfaction were for the general atmosphere (3.72) and sense of welcome (3.61). The lowest levels of satisfaction were with the quality and range of evening entertainment (2.58 and 2.66 out of 4.00 respectively).

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

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



On the whole, visitor satisfaction scores remained broadly similar to 2015 levels.

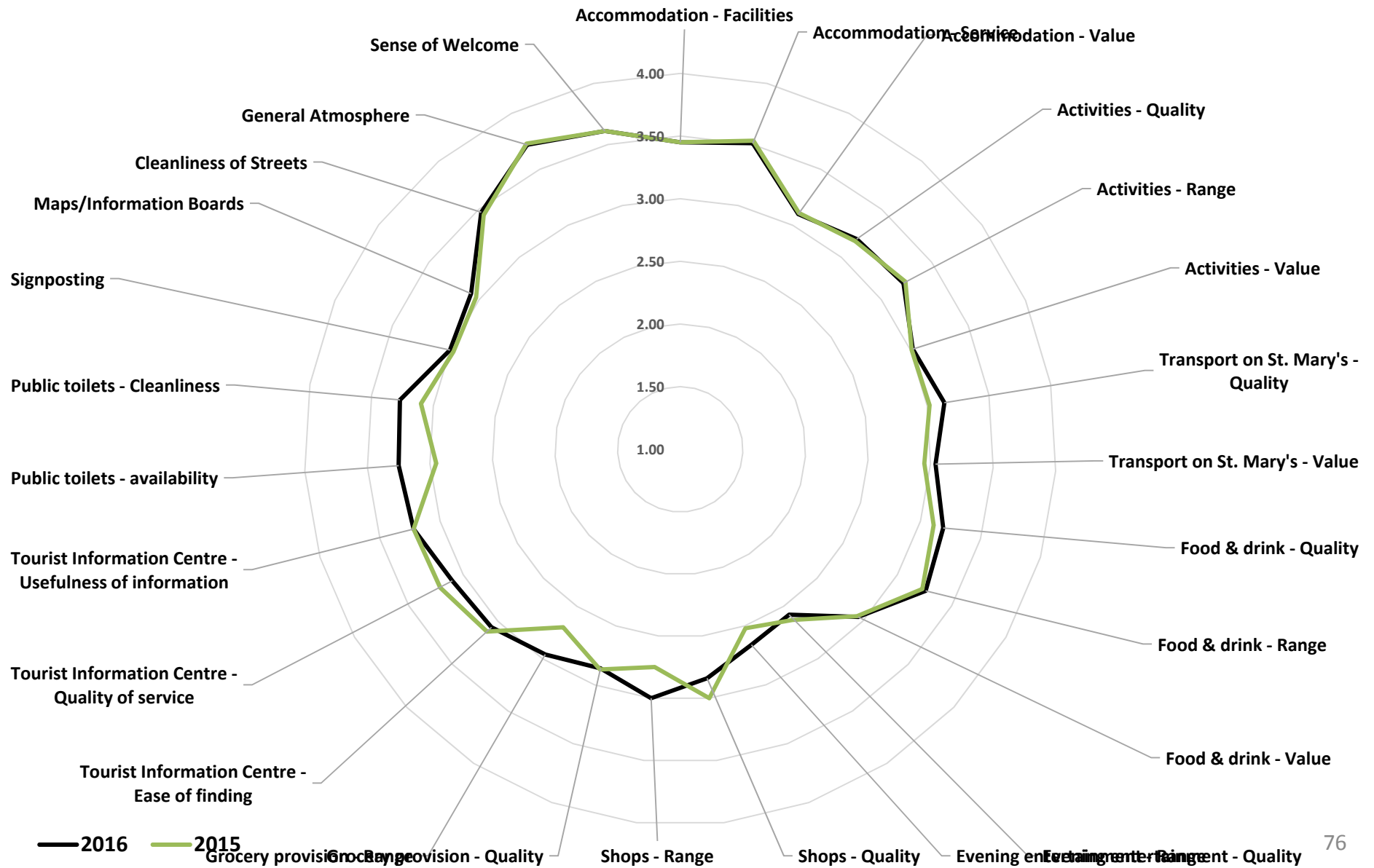
#	Indicator	2016	2015	#	Indicator	2016	2015
1	Accommodation – Facilities	3.45	3.45	16	Grocery provision – Quality	2.86	2.87
2	Accommodation – Service	3.51	3.53	17	Grocery provision - Range	2.96	2.70
3	Accommodation – Value	3.10	3.11	18	TIC- Ease of finding	3.07	3.12
4	Activities – Quality	3.19	3.17	19	TIC- Quality of service	3.10	3.21
5	Activities - Range	3.22	3.24	20	TIC- Usefulness of information	3.22	3.22
6	Activities – Value	3.02	3.01	21	Public toilets - availability	3.25	2.95
7	Transport on St. Mary's - Quality	3.14	3.02	22	Public toilets - Cleanliness	3.27	3.10
8	Transport on St. Mary's - Value	3.04	2.95	23	Signposting	3.00	2.97
9	Food & drink - Quality	3.19	3.11	24	Maps/Information Boards	3.08	3.03
10	Food & drink – Range	3.26	3.23	25	Cleanliness of Streets	3.47	3.44
11	Food & drink – Value	2.95	2.94	26	General Atmosphere	3.72	3.73
12	Evening entertainment – Quality	2.58	2.63	27	Sense of Welcome	3.61	3.61
13	Evening entertainment - Range	2.66	2.52				
14	Shops - Quality	2.84	3.00				
15	Shops - Range	3.00	2.75				

	Score increased by more than + 0.05 compared with 2015
	Score level or within +/- 0.05 compared with 2015
	Score decreased by more than -0.05 compared with 2015

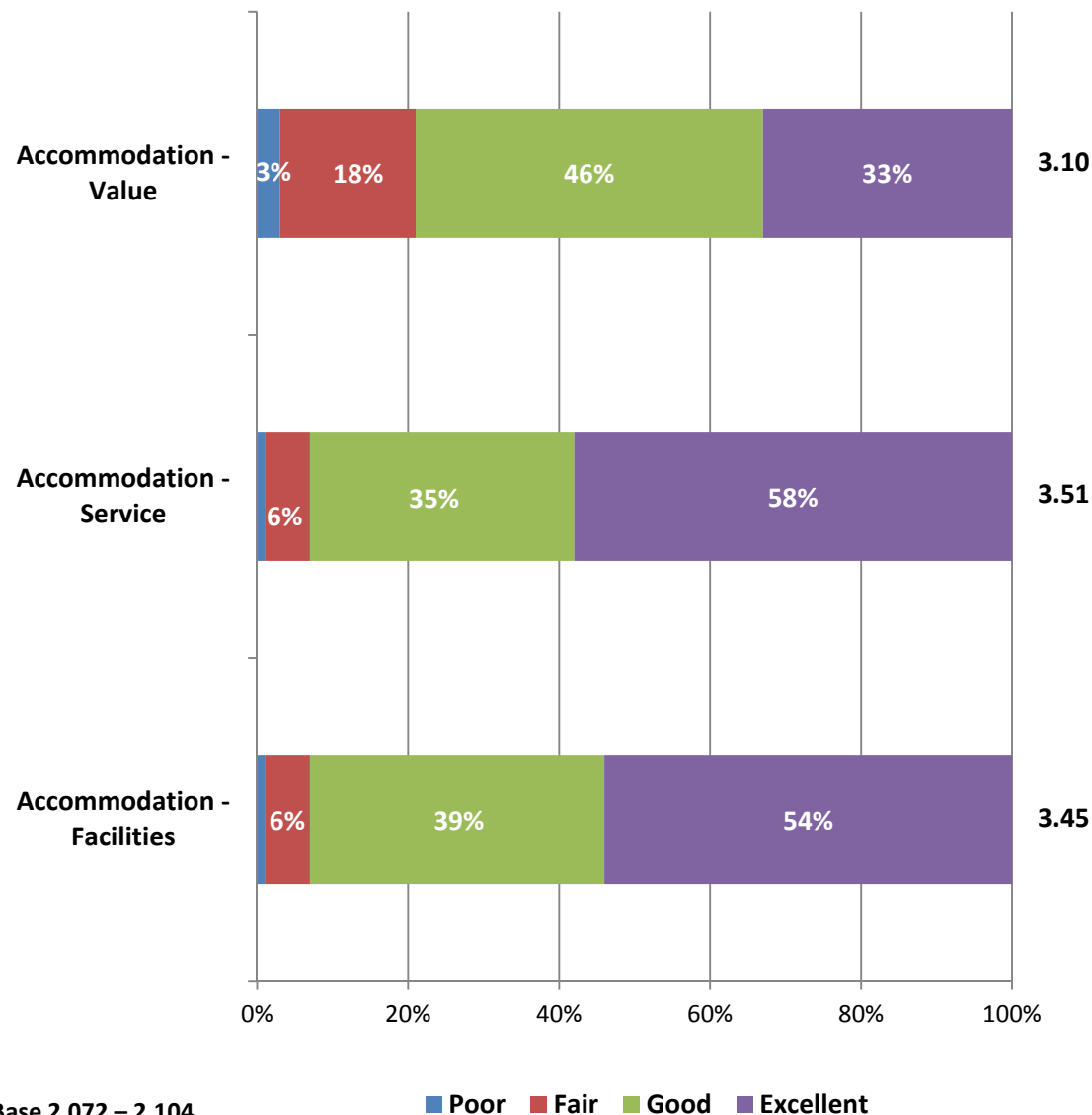
On the whole, visitor satisfaction scores remained broadly similar to 2015 levels. The quality and value of transport on St. Mary's, the range of evening entertainment, the range of shops, the range of grocery provision and the availability and cleanliness of the public toilets all of which increased by +0.05 or more compared with 2015 scores. The average scores for the quality of shops and quality of service at the TIC both decreased by -0.05 or more compared with the 2015 satisfaction scores for these indicators.

The radar chart overleaf displays the mean average scores for each indicator in a visual format for both 2016 and 2015.

15 out of the 27 indicators explored in terms of visitor satisfaction with the Isles of Scilly during 2016 increased in satisfaction compared with 2015. 3 indicators remained at the same level as last year and 9 indicators decreased in satisfaction compared with 2015.



The mean satisfaction scores calculated for all aspects of accommodation on the Islands were high. Scores ranged from 3.10 for value to 3.51 for service.



93% of visitors rated the facilities at their accommodation on the Islands as 'good' or 'excellent', as did 93% for service at their accommodation and 79% in terms of value.

18% 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 3.10 out of 4.00 for value to 3.51 for service (third highest ranked indicator of all those explored during the 2016 survey).

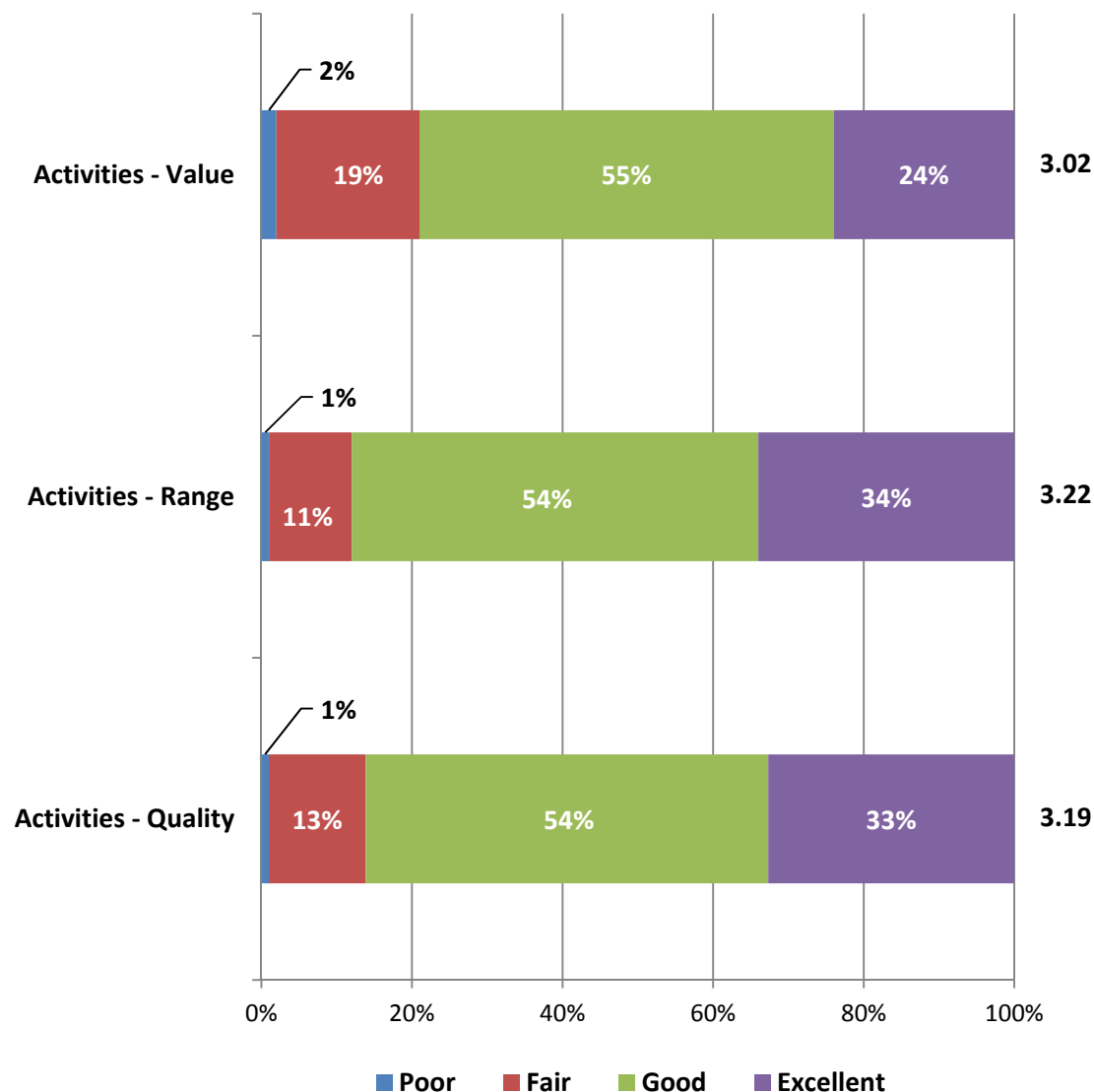
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2015.

On the whole, levels of satisfaction with the different aspects of accommodation were highest amongst October to December visitors, those on a repeat visit, those on a secondary holiday, those staying on Treasco, those who had travelled by Skybus and those staying 5-7 days on the Islands.

Accommodation - mean satisfaction scores (out of a max. of 4.00)	Facilities	Service	Value
JAN-MAR	3.41	3.54	3.20
APR-JUN	3.48	3.54	3.10
JUL-SEP	3.42	3.49	3.09
OCT-DEC	3.58	3.63	3.19
FIRST TIME	3.41	3.48	3.13
REPEAT	3.47	3.53	3.09
MAIN	3.45	3.53	3.13
SECOND	3.47	3.53	3.07
SHORT	3.45	3.47	3.06
ST MARY'S	3.44	3.51	3.12
ST AGNES	3.34	3.46	3.24
BRYHER	3.59	3.66	3.11
TRESCO	3.64	3.68	2.89
ST MARTIN'S	3.40	3.46	3.15
SKYBUS	3.52	3.57	3.12
SCILLONIAN	3.40	3.47	3.09
PRIVATE	2.76	3.15	2.81
CRUISE	3.33	3.33	3.17
OTHER TRANSPORT	3.48	3.51	3.03
2-4 NIGHTS	3.45	3.55	3.06
5-7 NIGHTS	3.47	3.51	3.12
8+ NIGHTS	3.44	3.53	3.09
2015	3.45	3.53	3.11

 Analysis segment ranking the individual factor the highest

The mean satisfaction scores calculated for all aspects of activities on the Islands were high. Scores ranged from 3.02 out of 4.00 for value to 3.22 for the range of activities.



88% of visitors rated the range of activities on the Islands as 'good' or 'excellent', as did 87% for the quality of the activities and 79% in terms of value for money.

19% of visitors rated the value of the activities on the Islands as 'fair' and 2% as 'poor'.

The mean satisfaction scores calculated for all aspects of activities on the Islands were high. Scores ranged from 3.02 out of 4.00 for value to 3.22 for the range of activities (ninth highest ranked indicator of all those explored during the 2016 survey).

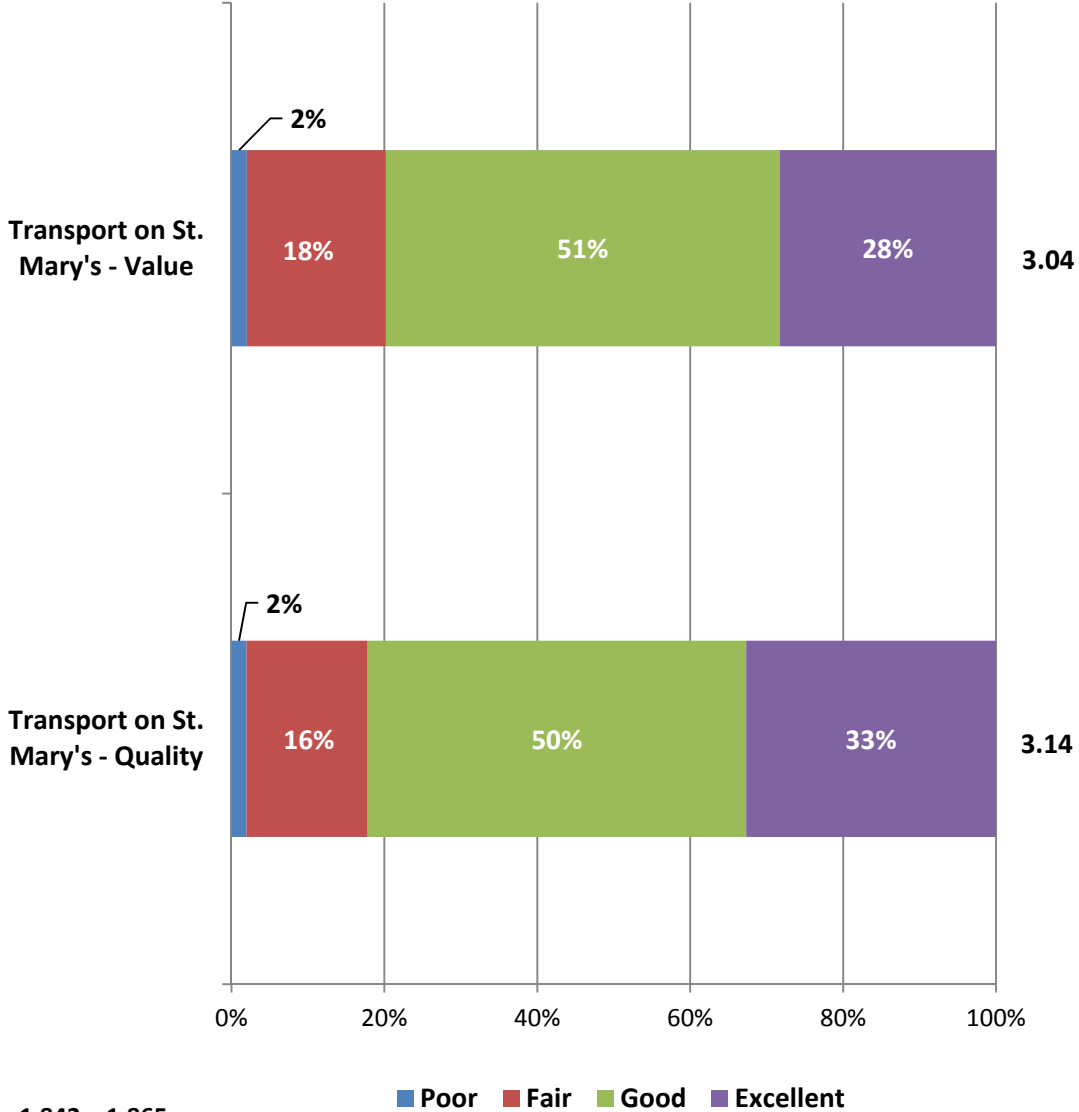
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2015.

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

Activities - mean satisfaction scores (out of a max. of 4.00)	Quality	Range	Value
STAYING	3.19	3.22	3.02
DAY	3.17	3.15	3.03
JAN-MAR	3.08	3.11	2.89
APR-JUN	3.10	3.19	3.22
JUL-SEP	3.19	3.22	3.01
OCT-DEC	3.28	3.27	3.10
FIRST TIME	3.19	3.21	3.08
REPEAT	3.19	3.22	2.99
MAIN	3.24	3.26	3.05
SECOND	3.15	3.19	3.00
SHORT	3.05	3.08	2.91
ST MARY'S	3.19	3.21	3.03
ST AGNES	3.27	3.30	3.07
BRYHER	3.18	2.94	3.07
TRESCO	3.25	3.30	2.94
ST MARTIN'S	3.12	3.24	2.97
SKYBUS	3.18	3.21	3.03
SCILLONIAN	3.21	3.23	3.01
PRIVATE	3.09	3.14	2.70
CRUISE	3.22	3.11	3.11
OTHER TRANSPORT	3.05	3.15	2.91
2-4 NIGHTS	3.15	3.18	3.00
5-7 NIGHTS	3.18	3.21	3.02
8+ NIGHTS	3.24	3.25	3.01
2015	3.24	3.17	3.01

 Analysis segment ranking the individual factor the highest

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



In terms of transport on St. Mary's, 83% of visitors rated the quality as 'good' or 'excellent' whilst 79% said the same in terms of value.

The quality and value of the transport on St. Mary's was rated 'fair' by 16% and 18% of visitors respectively and as 'poor' by 2% of visitors in each case.

The mean satisfaction scores calculated for both aspects of transport on St. Mary's were good. Scores ranged from 3.04 for value to 3.14 for quality of service of transport on St. Mary's.

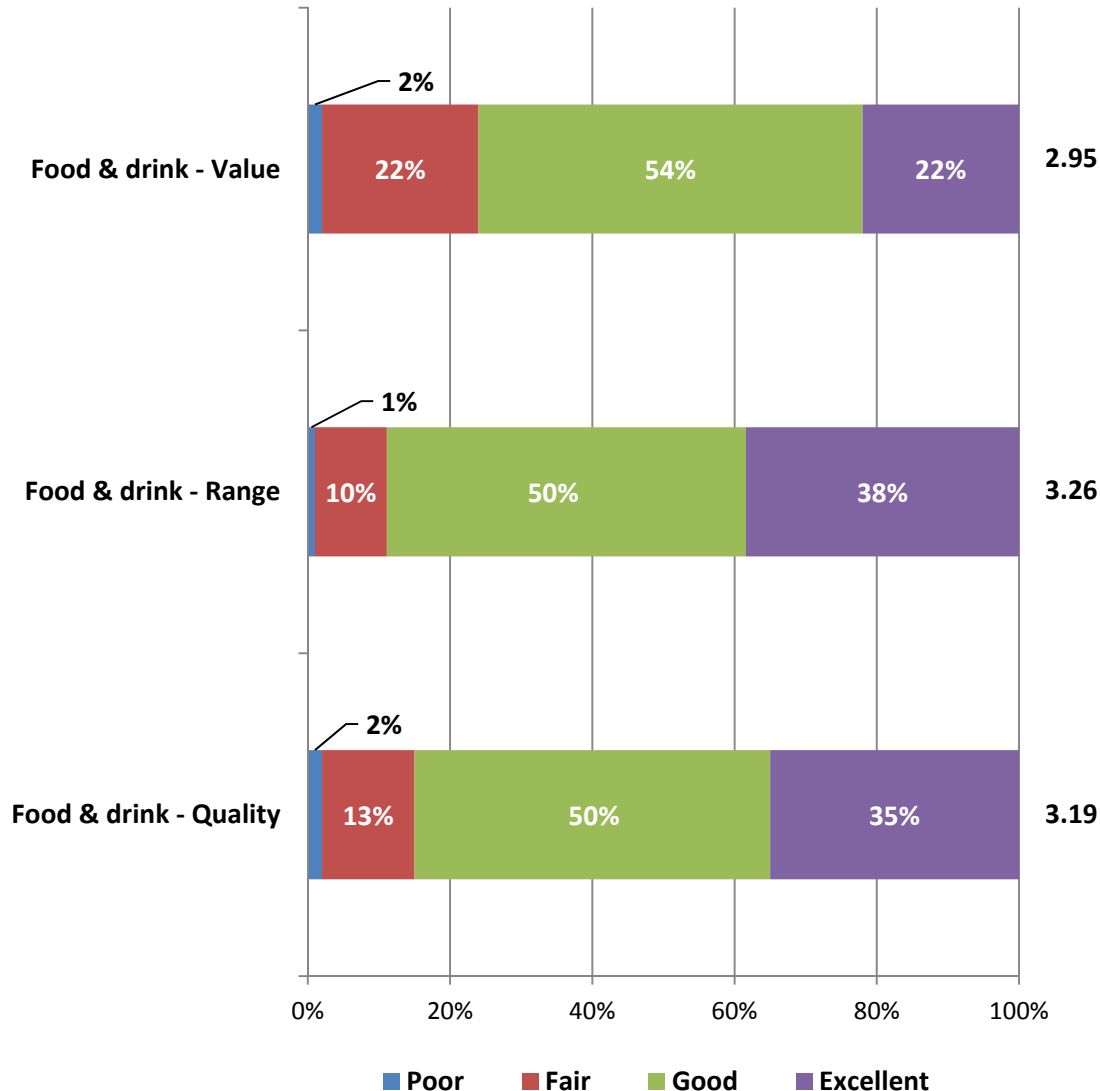
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2015.

On the whole, levels of satisfaction with the transport on St. Mary's were highest amongst staying visitors, January to March and April to June visitors, first time visitors, those on a short break, those staying on Treasco, cruise ship passengers 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	Value
STAYING	3.14	3.05
DAY	3.08	2.94
JAN-MAR	3.13	3.13
APR-JUN	3.15	3.06
JUL-SEP	3.14	3.03
OCT-DEC	3.10	3.08
FIRST TIME	3.17	3.11
REPEAT	3.13	3.02
MAIN	3.16	3.04
SECOND	3.10	3.04
SHORT	3.17	3.11
ST MARY'S	3.14	3.06
ST AGNES	3.05	3.06
BRYHER	3.07	2.98
TRESCO	3.34	3.19
ST MARTIN'S	3.06	2.88
SKYBUS	3.24	3.12
SCILLONIAN	3.05	2.98
PRIVATE	2.84	2.74
CRUISE	3.25	3.25
OTHER TRANSPORT	3.07	2.93
2-4 NIGHTS	3.15	3.11
5-7 NIGHTS	3.17	3.08
8+ NIGHTS	3.08	2.97
2015	3.02	2.95

 Analysis segment ranking the individual factor the highest

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



88% of visitors rated the range of food & drink on the Islands as 'good' or 'excellent', as did 85% for the quality and 76% for value.

22% of visitors rated the value of the food & drink on the Islands as 'fair' and 2% as 'poor'.

With the exception of the value for money, the mean satisfaction scores calculated for all aspects of food & drink on the Islands were high, ranging from 3.19 out of 4.00 for the quality of food & drink to 3.26 for the range of food & drink.

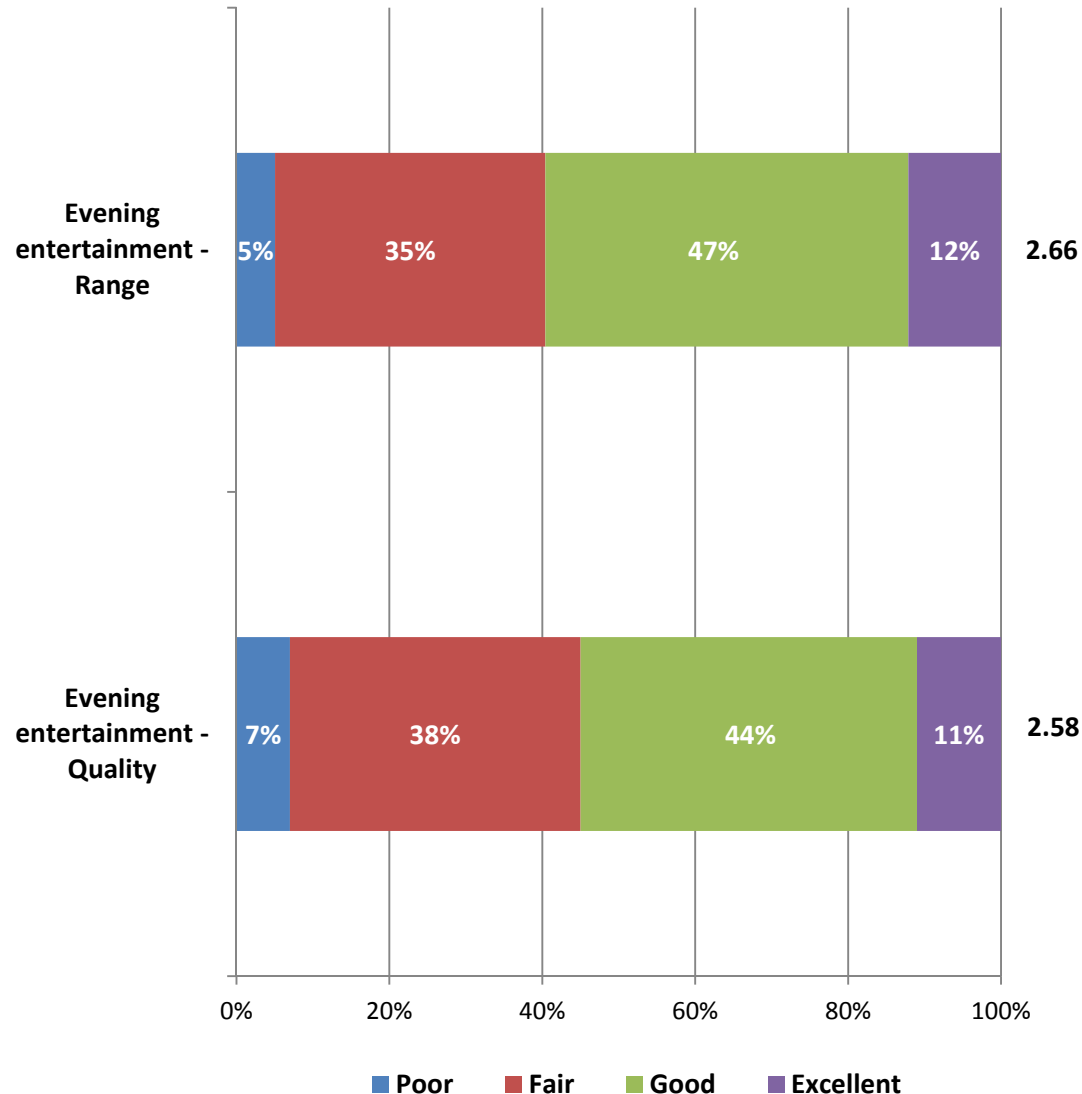
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2015.

On the whole, levels of satisfaction with the food & drink on the Islands were highest amongst staying visitors, October to December visitors, first time visitors, those on their main holiday of the year, those staying on St. Agnes and St. Martin's and those staying 5-7 days.

Food & drink - mean satisfaction scores (out of a max. of 4.00)	Quality	Range	Value
STAYING	3.19	3.26	2.94
DAY	3.11	3.16	3.04
JAN-MAR	2.82	2.97	2.76
APR-JUN	3.18	3.24	2.93
JUL-SEP	3.28	2.96	2.57
OCT-DEC	3.15	3.24	2.95
FIRST TIME	3.17	3.30	3.01
REPEAT	3.19	3.24	2.92
MAIN	3.23	3.29	2.96
SECOND	3.13	3.23	2.91
SHORT	3.11	3.20	2.94
ST MARY'S	3.19	3.28	2.96
ST AGNES	3.21	3.37	2.99
BRYHER	3.08	3.24	2.97
TRESCO	3.11	3.26	2.83
ST MARTIN'S	3.11	3.20	2.84
SKYBUS	3.19	3.26	2.97
SCILLONIAN	3.18	3.25	2.93
PRIVATE	2.89	3.00	2.72
CRUISE	3.11	3.33	2.88
OTHER TRANSPORT	3.27	3.38	2.99
2-4 NIGHTS	3.11	3.24	2.95
5-7 NIGHTS	3.20	3.27	2.97
8+ NIGHTS	3.21	3.25	2.89
2015	3.23	3.11	2.94

 Analysis segment ranking the individual factor the highest

The two mean satisfaction scores calculated for evening entertainment on the Islands were the lowest of all the indicators explored during the 2016 survey.



59% of visitors rated the range of evening entertainment on the Islands as 'good' or 'excellent', as did 55% in terms of quality.

35% of visitors rated the range of evening entertainment on the Islands as 'fair' and 5% as 'poor'. The quality of evening entertainment on the Islands was rated as 'fair' or 'poor' by 38% and 7% of visitors respectively.

The two mean satisfaction scores calculated for evening entertainment on the Islands were the lowest of all the indicators explored during the 2016 survey at 2.58 out of 4.00 for the quality of evening entertainment and 2.66 in terms of quality. This was also the case during the 2015 survey.

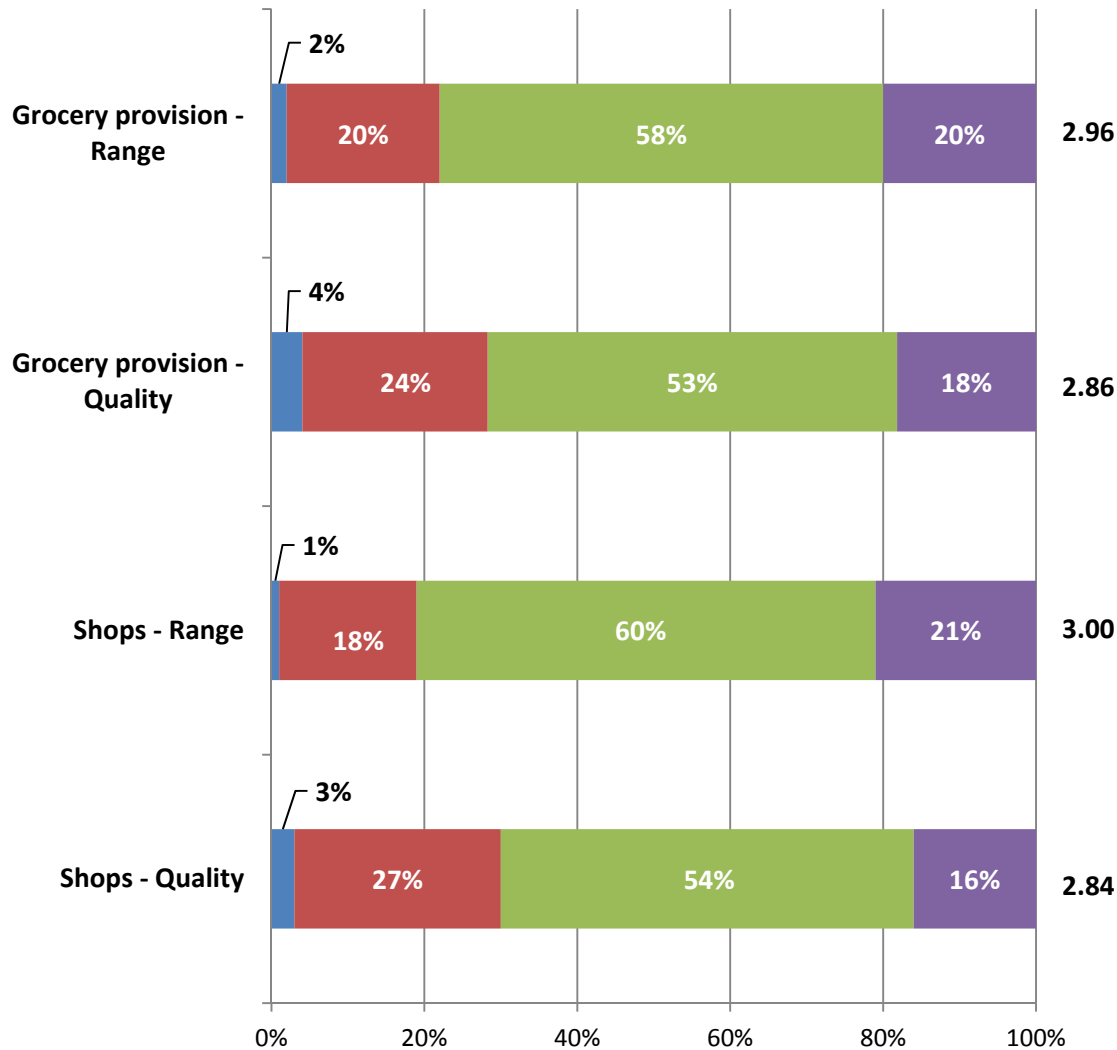
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2015.

On the whole, levels of satisfaction with evening entertainment on the Islands were highest amongst day visitors, October to December visitors, those on their main holiday of the year, those staying on St. Agnes and those staying 8+ days on the Islands.

Evening entertainment- mean satisfaction scores (out of a max. of 4.00)	Quality	Range
STAYING	2.57	2.66
DAY	2.75	2.80
JAN-MAR	2.28	2.33
APR-JUN	2.59	2.67
JUL-SEP	2.57	2.67
OCT-DEC	2.61	2.68
FIRST TIME	2.58	2.64
REPEAT	2.57	2.67
MAIN	2.61	2.71
SECOND	2.53	2.63
SHORT	2.49	2.53
ST MARY'S	2.57	2.67
ST AGNES	2.77	2.87
BRYHER	2.49	2.58
TRESCO	2.54	2.64
ST MARTIN'S	2.45	2.64
SKYBUS	2.55	2.63
SCILLONIAN	2.61	2.69
PRIVATE	2.38	2.48
CRUISE	2.60	3.00
OTHER TRANSPORT	2.52	2.69
2-4 NIGHTS	2.57	2.61
5-7 NIGHTS	2.55	2.64
8+ NIGHTS	2.61	2.72
2015	2.63	2.52

 Analysis segment ranking the individual factor the highest

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



81% of visitors rated the range of shops on the Islands as 'good' or 'excellent', as did 70% for the quality of the shops. 78% rated the range of grocery provision as 'good' or 'excellent' as did 71% for the quality of the grocery provision.

27% of visitors rated the quality of shops as 'fair' as did 24% for the quality of the grocery provision. 18% of visitors rated the range of shops as 'fair', as did 20% of visitors for the range of grocery provision.

The mean satisfaction scores calculated for all aspects of shopping on the Islands were fair to good and ranged from 2.84 out of 4.00 for the quality of the shops (third lowest ranked indicator of all those explored during the 2016 survey) to 3.00 for the range of shops. The quality and range of the grocery provision received average scores of 2.86 (fourth lowest ranked indicator) and 2.96 (sixth lowest ranked indicator) respectively.

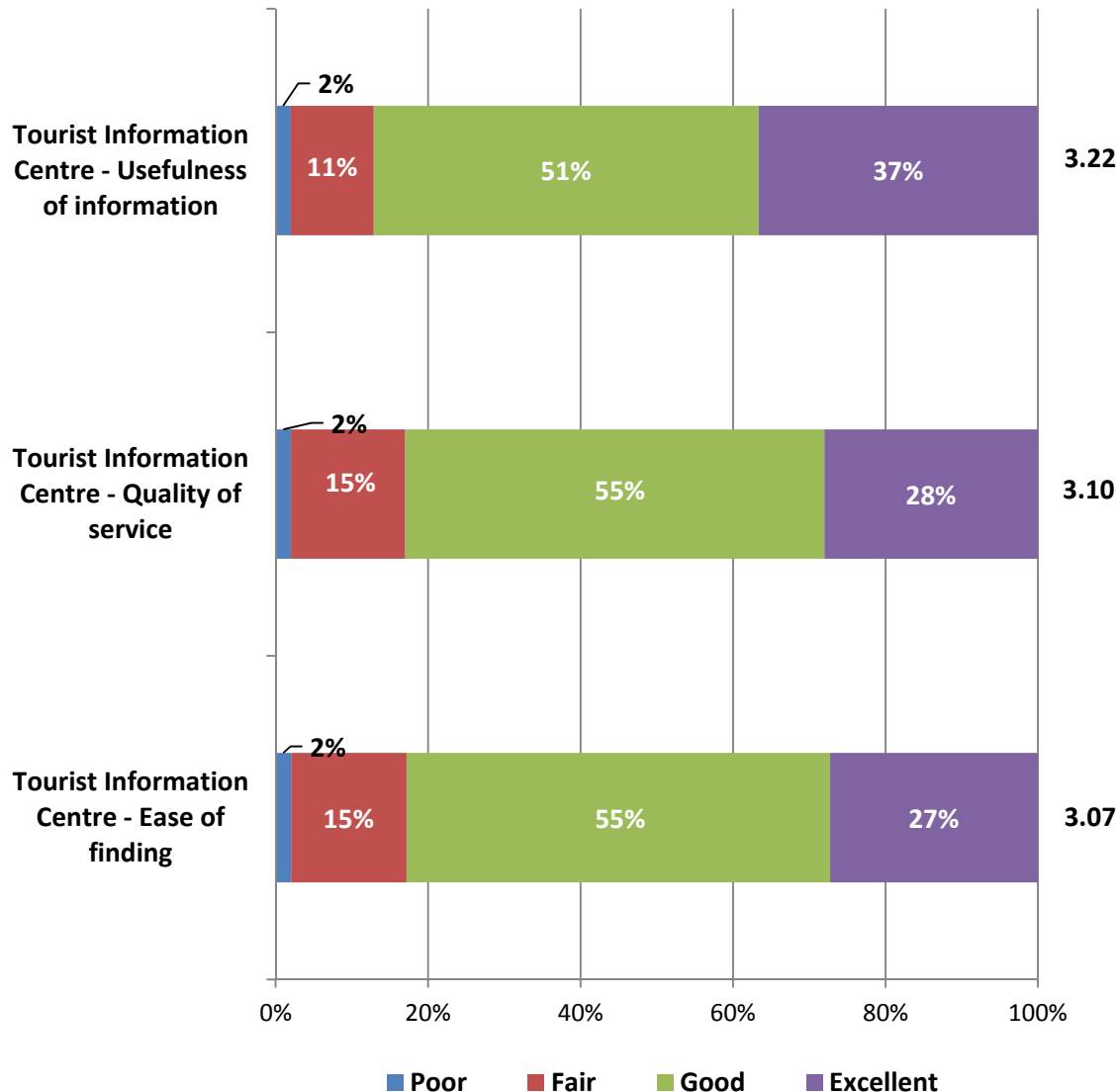
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2015.

On the whole, levels of satisfaction with shopping provision on the Islands were highest amongst staying visitors, April to June visitors, those on their main holiday of the year, those staying on St. Agnes, those arriving by Skybus or on a cruise and those spending 5-7 days on the Islands.

Shopping - mean satisfaction scores (out of a max. of 4.00)	Quality of shops	Range of shops	Quality of grocery provision shops	Range of grocery provision shops
STAYING	2.84	3.00	2.86	2.96
DAY	2.76	2.98	2.82	3.03
JAN-MAR	2.68	2.95	2.74	2.69
APR-JUN	2.85	3.01	2.86	2.97
JUL-SEP	2.83	2.99	2.86	2.96
OCT-DEC	2.82	3.00	2.84	2.99
FIRST TIME	2.83	2.99	2.90	3.03
REPEAT	2.84	3.01	2.84	2.94
MAIN	2.89	3.05	2.87	2.99
SECOND	2.78	2.94	2.83	2.92
SHORT	2.79	2.93	2.83	2.90
ST MARY'S	2.85	3.02	2.83	2.96
ST AGNES	2.90	3.22	2.96	3.15
BRYHER	2.78	3.03	2.97	3.09
TRESCO	2.75	2.95	3.00	3.07
ST MARTIN'S	2.68	2.87	2.62	2.77
SKYBUS	2.87	3.02	2.87	2.94
SCILLONIAN	2.82	3.00	2.86	3.00
PRIVATE	2.62	2.84	2.70	2.78
CRUISE	2.80	2.89	3.00	3.00
OTHER TRANSPORT	2.68	2.89	2.68	2.90
2-4 NIGHTS	2.78	2.95	2.89	2.95
5-7 NIGHTS	2.86	3.02	2.88	2.99
8+ NIGHTS	2.83	2.98	2.81	2.91
2015	3.00	2.75	2.87	2.70

 Analysis segment ranking the individual factor the highest

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



In terms of the tourist information centre (TIC), 82% rated the ease of finding it as 'good' or 'excellent', 83% rated it the same in terms of quality of service and 88% the same in terms of the usefulness of the information they received.

The mean satisfaction scores calculated for all aspects of the TIC were good. Scores ranged from 3.07 out of 4.00 for the ease of finding the TIC to 3.22 for the usefulness of the information received at the TIC. The quality of service at the TIC achieved an average score of 3.10 out of 4.00.

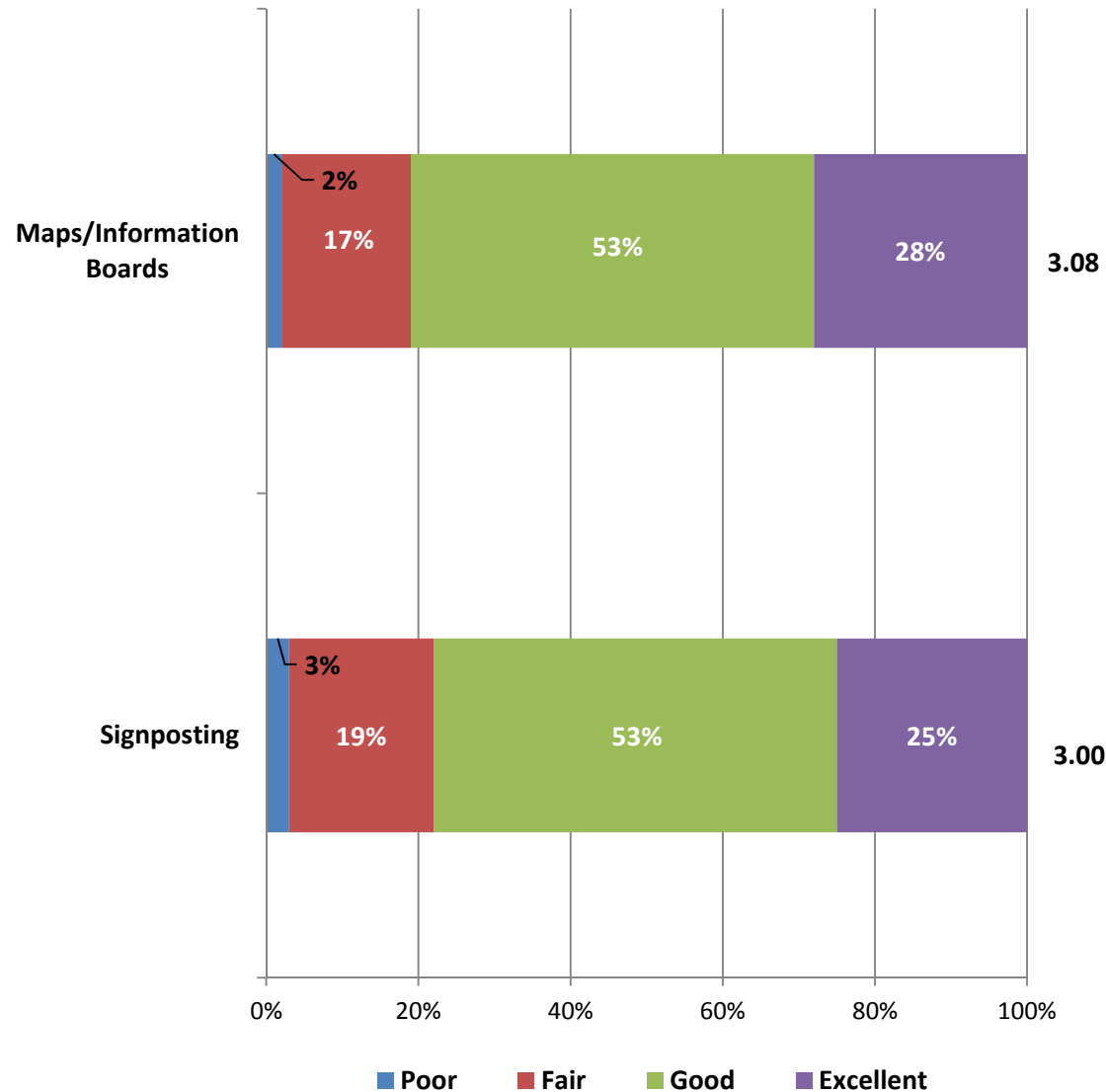
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2015.

On the whole, levels of satisfaction with the TIC were highest amongst staying visitors, April to June and October to December visitors, repeat visitors, those on their main holiday of the year, those staying on Tresco, those arriving by Skybus or other transport and those staying 2-4 days or 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	3.07	3.10	3.23
DAY	3.11	3.12	3.16
JAN-MAR	3.08	3.05	3.03
APR-JUN	3.09	3.11	3.20
JUL-SEP	3.06	3.10	3.25
OCT-DEC	3.05	3.09	3.19
FIRST TIME	3.08	3.10	3.22
REPEAT	3.07	3.10	3.23
MAIN	3.08	3.12	3.25
SECOND	3.01	3.06	3.18
SHORT	3.14	3.11	3.22
ST MARY'S	3.05	3.09	3.26
ST AGNES	3.18	3.11	3.16
BRYHER	2.97	3.01	2.96
TRESCO	3.21	3.19	3.19
ST MARTIN'S	2.93	3.00	2.91
SKYBUS	3.09	3.26	3.27
SCILLONIAN	3.04	3.12	3.20
PRIVATE	3.00	3.04	3.00
CRUISE	3.60	3.25	2.90
OTHER TRANSPORT	2.95	2.94	3.14
2-4 NIGHTS	3.13	3.14	3.20
5-7 NIGHTS	3.05	3.09	3.23
8+ NIGHTS	3.07	3.10	3.22
2015	3.12	3.21	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.



78% of visitors rated the signposting on the Islands as 'good' or 'excellent', compared with 81% for the maps/information boards. The signposting and maps/information boards on the Islands were rated as 'fair' by 19% and 17% of visitors respectively.

The mean satisfaction scores calculated for both aspects of the ease of finding your way around were good. Scores ranged from 3.00 out of 4.00 for signposting to 3.08 for the maps/information boards.

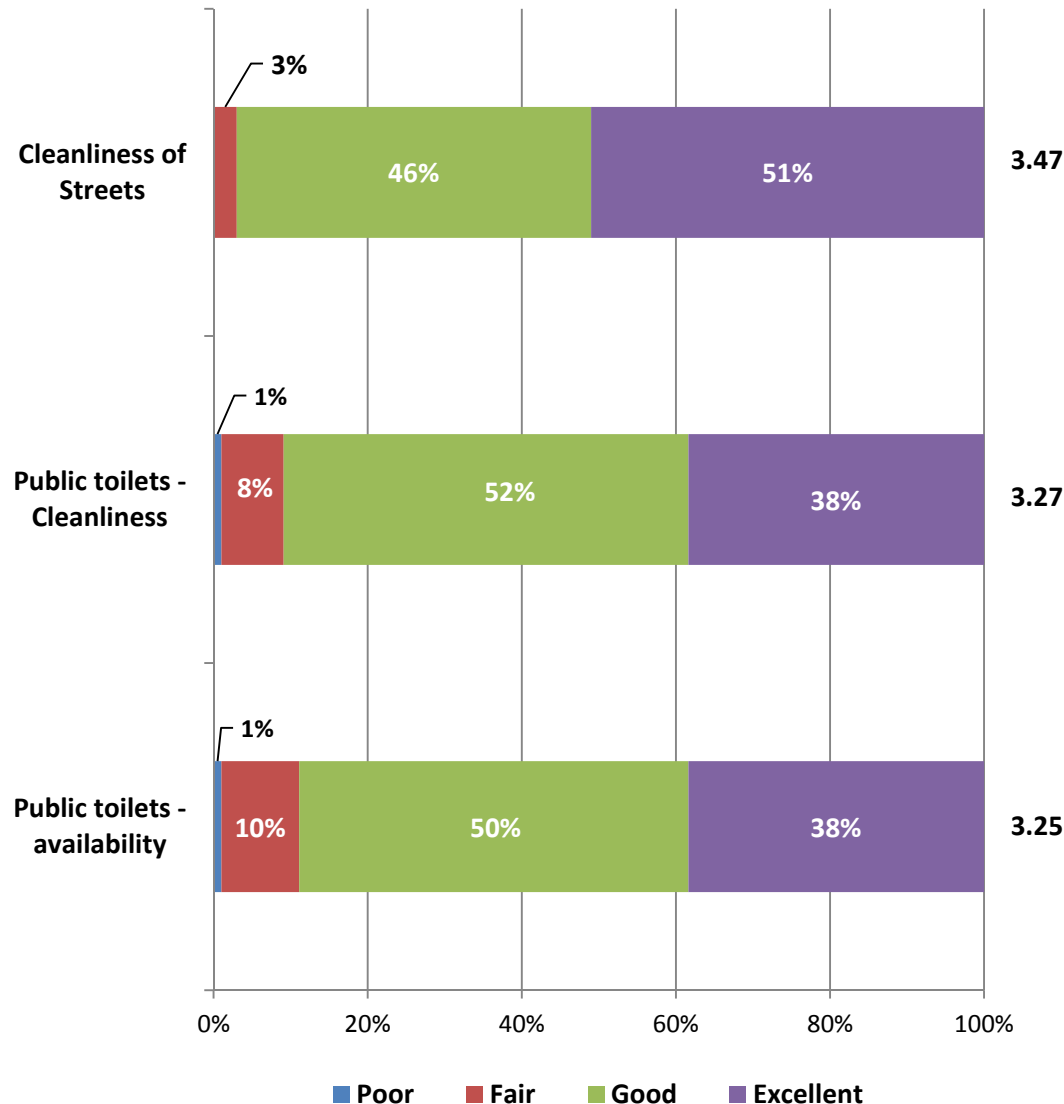
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2015.

On the whole, levels of satisfaction with ease of finding way around were highest amongst staying visitors, April to June and October to December visitors, repeat visitors, those on their main holiday of the year, those staying on Treasco, those arriving by Skybus or other transport and those staying 2-4 days or 8+ days.

Ease of finding way around - mean satisfaction scores (out of a max. of 4.00)	Signposting	Maps/ Information Boards
STAYING	3.00	3.07
DAY	2.98	3.15
JAN-MAR	2.76	2.76
APR-JUN	2.96	3.08
JUL-SEP	3.03	3.07
OCT-DEC	3.08	3.25
FIRST TIME	2.96	3.07
REPEAT	3.02	3.08
MAIN	3.02	3.09
SECOND	2.98	3.07
SHORT	2.99	3.04
ST MARY'S	3.03	3.11
ST AGNES	3.07	3.06
BRYHER	2.81	2.81
TRESCO	2.94	2.97
ST MARTIN'S	2.84	2.88
SKYBUS	2.98	3.07
SCILLONIAN	3.01	3.08
PRIVATE	2.92	2.96
CRUISE	2.92	3.08
OTHER TRANSPORT	3.16	3.17
2-4 NIGHTS	2.98	3.05
5-7 NIGHTS	3.00	3.07
8+ NIGHTS	3.03	3.10
2015	2.97	3.03

 Analysis segment ranking the individual factor the highest

The mean satisfaction scores for the public toilets and cleanliness of the streets on the Islands were rated highly with the cleanliness of the streets ranked the fifth highest indicator of all those explored in terms of satisfaction during the 2016 survey.



88% of visitors rated the availability of the public toilets on the Islands as 'good' or 'excellent' compared with 90% who said the same for their cleanliness. 97% of visitors rated the cleanliness of the streets as 'good' or 'excellent'.

10% of visitors rated the availability of the public toilets as 'fair', compared with 8% who said the same in terms of their cleanliness (8%).

The mean satisfaction scores for the availability and cleanliness of the public toilets (3.25 and 3.27 respectively) and the cleanliness of the streets on the Islands (3.47) were all high. The cleanliness of the streets ranked the fourth highest indicator of all those explored in terms of satisfaction during the 2016 survey.

At 3.25 the availability of public toilets on the Islands was the seventh lowest ranked indicator in terms of satisfaction during the 2016 survey.

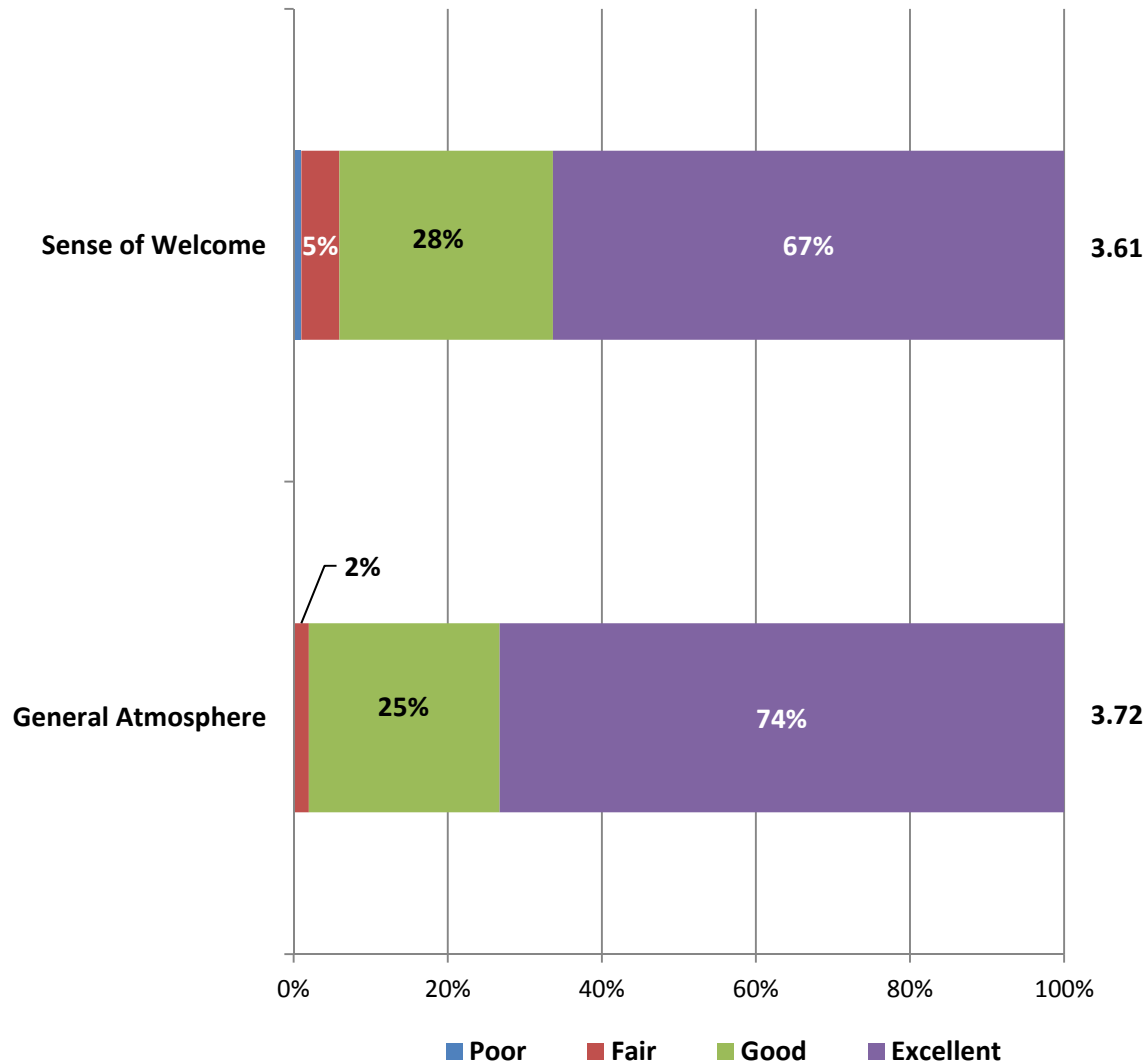
The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2015.

On the whole, levels of satisfaction with public toilets and cleanliness of the streets were highest amongst day visitors, July to September visitors, repeat visitors, those on a short break, those staying on St. Mary's, those arriving by Skybus and those staying 5-7 or 8+ days on the Islands.

Public toilets/cleanliness of the streets - mean satisfaction scores (out of a max. of 4.00)	Public Toilets – Availability	Public Toilets - Quality/Cleanliness	Cleanliness of the Streets
STAYING	3.25	3.27	3.47
DAY	3.31	3.28	3.49
JAN-MAR	3.27	3.16	3.35
APR-JUN	3.23	3.26	3.47
JUL-SEP	3.26	3.28	3.47
OCT-DEC	3.29	3.23	3.46
FIRST TIME	3.24	3.25	3.51
REPEAT	3.26	3.28	3.45
MAIN	3.26	3.29	3.49
SECOND	3.23	3.23	3.41
SHORT	3.28	3.25	3.48
ST MARY'S	3.28	3.31	3.48
ST AGNES	3.21	3.30	3.47
BRYHER	3.06	3.10	3.31
TRESCO	3.25	3.22	3.45
ST MARTIN'S	3.13	3.14	3.40
SKYBUS	3.27	3.29	3.45
SCILLONIAN	3.24	3.26	3.49
PRIVATE	3.18	3.09	3.43
CRUISE	3.20	3.20	3.45
OTHER TRANSPORT	3.25	3.20	3.49
2-4 NIGHTS	3.25	3.27	3.49
5-7 NIGHTS	3.25	3.27	3.47
8+ NIGHTS	3.25	3.27	3.44
2015	2.95	3.10	3.44

 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 2016 survey.



99% of visitors rated the general atmosphere on the Islands as 'good' or 'excellent', as did 95% for the sense of welcome on the Islands.

Only 5% of visitors rated the sense of welcome as 'fair', compared with 2% of visitors doing so for the general atmosphere.

At 3.72 out of 4.00 for the general atmosphere and 3.61 for the sense of welcome on the Islands, these were the two highest ranked indicators amongst visitors explored by the 2016 survey.

The mean satisfaction scores for each of the analysis segments are shown in the table overleaf, along with the comparative scores for 2015.

On the whole, levels of satisfaction with the general atmosphere and sense of welcome on the Islands were highest amongst staying visitors, repeat visitors, those on their main holiday of the year and those staying 8+ days on the Islands.

General atmosphere and sense of welcome- mean satisfaction scores (out of a max. of 4.00)	General atmosphere	Sense of welcome
STAYING	3.72	3.62
DAY	3.64	3.51
JAN-MAR	3.55	3.55
APR-JUN	3.72	3.64
JUL-SEP	3.73	3.61
OCT-DEC	3.69	3.53
FIRST TIME	3.71	3.64
REPEAT	3.72	3.60
MAIN	3.75	3.64
SECOND	3.67	3.58
SHORT	3.70	3.60
ST MARY'S	3.73	3.64
ST AGNES	3.75	3.63
BRYHER	3.65	3.55
TRESCO	3.69	3.62
ST MARTIN'S	3.69	3.51
SKYBUS	3.71	3.65
SCILLONIAN	3.73	3.59
PRIVATE	3.50	3.36
CRUISE	3.58	3.42
OTHER TRANSPORT	3.80	3.59
2-4 NIGHTS	3.71	3.60
5-7 NIGHTS	3.72	3.62
8+ NIGHTS	3.74	3.63
2015	3.73	3.61

 Analysis segment ranking the individual factor the highest

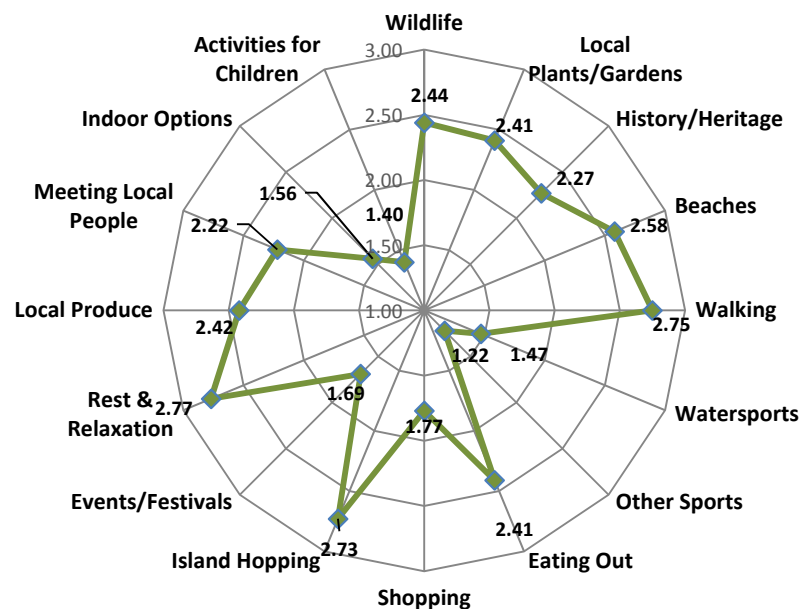
The features and activities on the Islands which visitors considered of highest importance to them were rest and relaxation, walking, island-hopping, the beaches, wildlife, local produce, local plants and gardens and eating out.

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

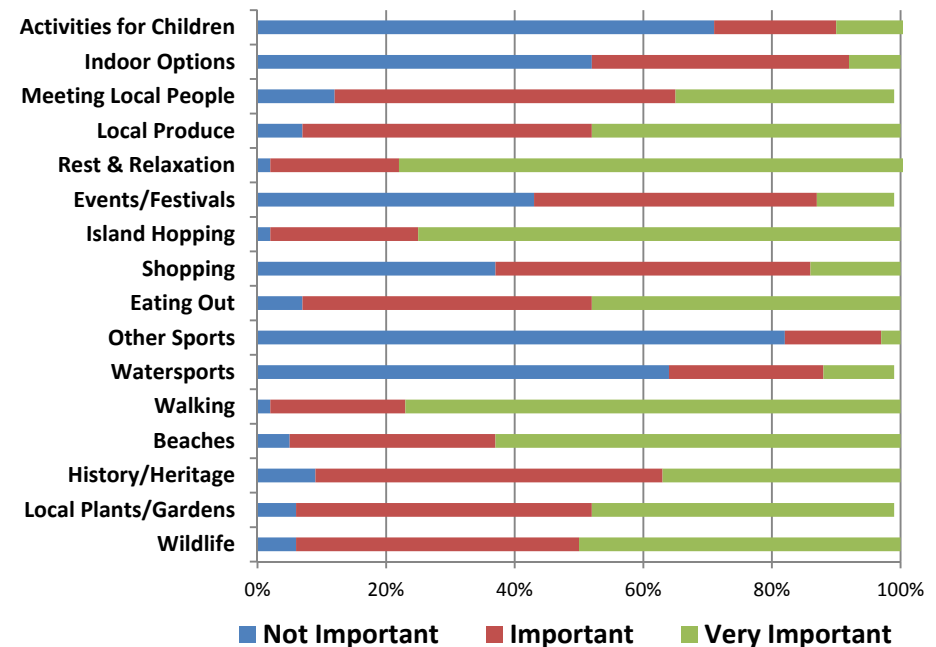
As the graphs below and table overleaf illustrate, the features and activities on the Islands which visitors considered of highest importance to them were rest and relaxation and walking scoring 2.77 and 2.75 out of 3.00 respectively. These were closely followed by island-hopping (2.73), beaches (2.58), wildlife (2.44), local produce (2.42), local plants and gardens and eating out (2.41 in each case).

Those features/activities considered of lower importance amongst visitors were other sports (1.22), activities for children (1.40), watersports (1.47), indoor options (1.56), events/festivals (1.69) and shopping (1.77). There was little variation in the results year on year or by analysis segment.

Importance of features & activities



Importance of features & activities



The features and activities on the Islands which visitors considered of least importance to them were other sports, activities for children, water sports and indoor options.

Importance of features & activities	Not Important	Important	Very Important
Wildlife	6%	44%	50%
Local Plants/Gardens	6%	46%	47%
History/Heritage	9%	54%	37%
Beaches	5%	32%	63%
Walking	2%	21%	77%
Water sports	64%	24%	11%
Other Sports	82%	15%	3%
Eating Out	7%	45%	48%
Shopping	37%	49%	14%
Island Hopping	2%	23%	75%
Events/Festivals	43%	44%	12%
Rest & Relaxation	2%	20%	79%
Local Produce	7%	45%	48%
Meeting Local People	12%	53%	34%
Indoor Options	52%	40%	8%
Activities for Children	71%	19%	11%

Base 2,053 – 2,155

60% of visitors said food and drink festivals would encourage them to visit with walking festivals (52%), music events (45%) and maritime festivals (40%) the next most popular. The least popular were comedy events (13%) and sporting events (16%).

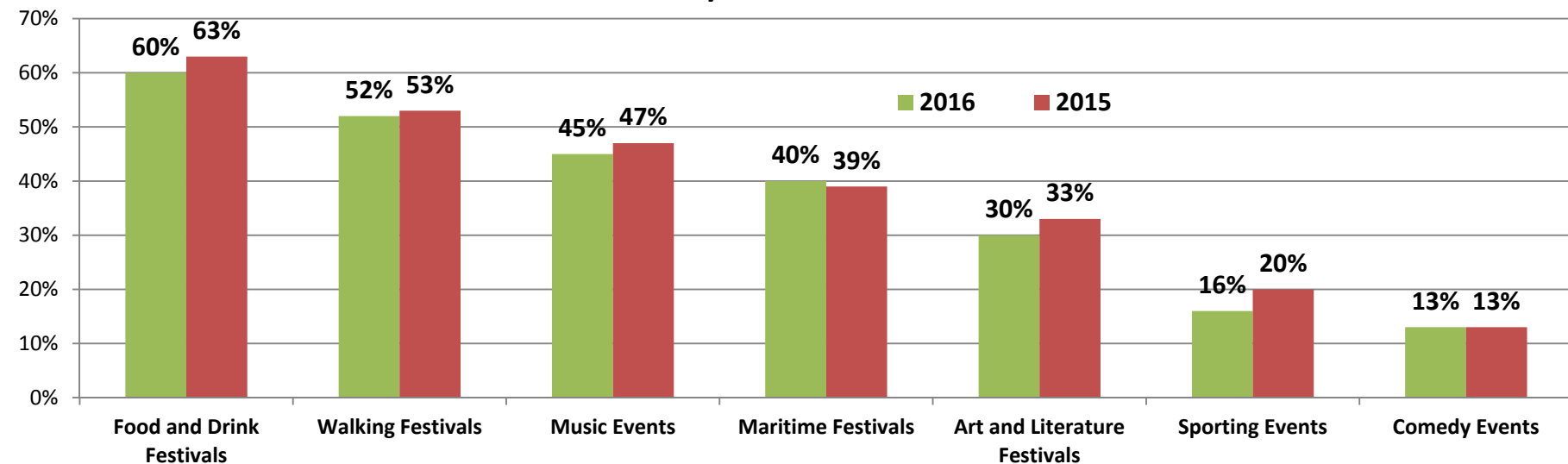
Respondents were also asked what types of events would encourage them to visit the Isles of Scilly. 26% of all respondents said none of the types of events or festivals listed would encourage them to visit the islands and a further 7% listed an 'other' festival or event. Both of these sets of respondents 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 60% said food and drink festivals would encourage them to visit (63% 2015) with walking festivals (52%, 53% 2015), music events (45%, 47% 2015) and maritime festivals (40%, 39% 2015) the next most popular. The least popular were comedy events (13%, same proportion as during 2015), sporting events (16%, 20% 2015) and art and literature festivals (30%, 33% 2015).

There was little variation in the results by segment.

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

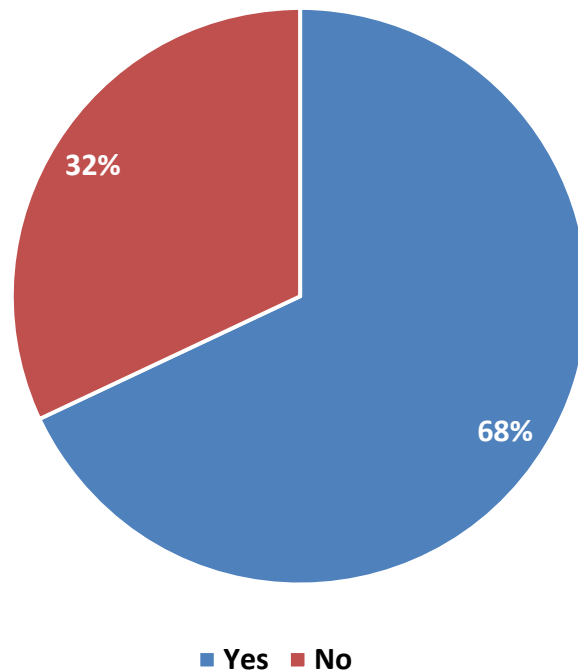
Events/festivals 2015-2016



Base 1,700

68% of respondents said they would consider taking a winter break on the Isles of Scilly.

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



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

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

Whilst there was little variation in the results between the analysis segment, this proportion decreased to 57% of first time visitors to the Islands (56% 2015).

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

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

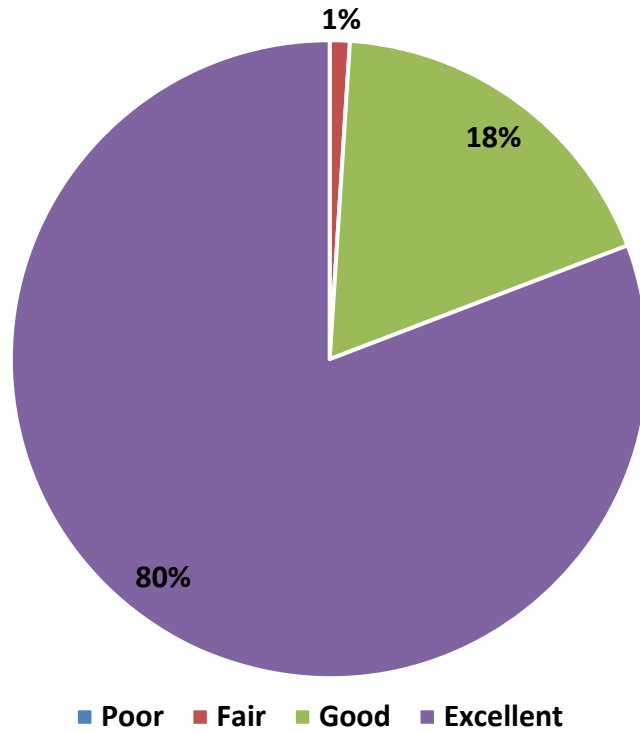
Respondents were asked what would encourage them to visit the Islands during the winter (Nov-March) and the responses are summarised in the Word cloud below. There was a wide and varied range of responses provided and the full list should be examined to gain a full understanding of this area.

Many mentioned the need for a better transport, improved weather and accommodation.



**80% of visitors gave their holiday to the Islands an overall rating of 'excellent' and a further 18% as 'good'.
The average mean score for their holiday overall was calculated at 3.79 out of 4.00.**

Overall rating of holiday



80% of visitors gave their holiday to the Islands an overall rating of 'excellent' (77% 2015) and a further 18% as 'good' (20% 2015).

Only 1% of visitors rated their holiday as 'fair' compared with 3% during 2015.

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


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

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

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

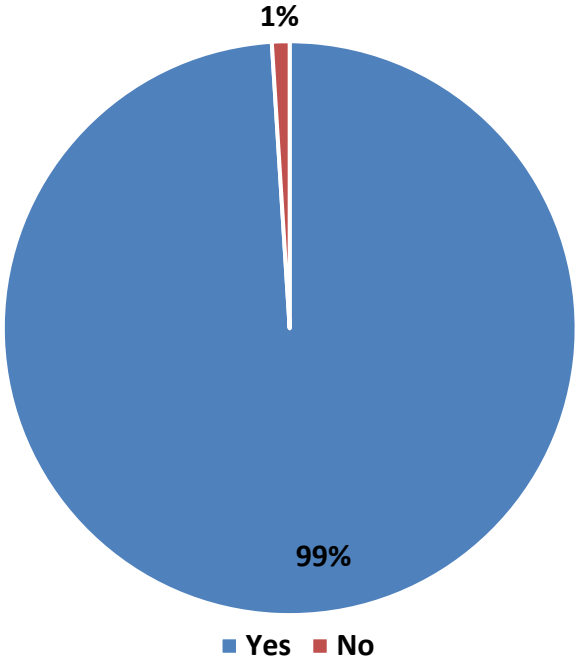
General atmosphere and sense of welcome- mean satisfaction scores (out of a max. of 4.00)

STAYING	3.80
DAY	3.55
JAN-MAR	3.67
APR-JUN	3.78
JUL-SEP	3.80
OCT-DEC	3.77
FIRST TIME	3.74
REPEAT	3.81
MAIN	3.85
SECOND	3.76
SHORT	3.68
ST MARY'S	3.80
ST AGNES	3.89
BRYHER	3.83
TRESCO	3.83
ST MARTIN'S	3.86
SKYBUS	3.80
SCILLONIAN	3.79
PRIVATE	3.54
CRUISE	3.42
OTHER TRANSPORT	3.79
2-4 NIGHTS	3.69
5-7 NIGHTS	3.80
8+ NIGHTS	3.86

 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.

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

There was little variation in the results by analysis segment.

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

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 a better transport, improved accommodation and information about visiting the Islands and that it was expensive.

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

Many mentioned the need for a better transport, improved accommodation and information about visiting the Islands and that it was expensive.



Visitor Expenditure

islands
partnership



Average visitor spend per person per day on the Islands (excluding accommodation) was £41.51. Staying visitors spent an average of £41.34 per person per night on their accommodation.

Average visitor spend per person per day on the Islands (excluding accommodation) was £41.51 (£49.30 in 2015 and £44.88 in 2014) ranging from £41.39 for staying visitors to £46.17 for those visiting the Islands for the day.

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

VISITOR SPEND BY CATEGORY 2016
(£/per person/per day)

	Accommodation (staying visitors only)	Meals/ snacks	Tourist shopping	Transport	Activities	Other	TOTAL	TOTAL (EXCLUDING ACCOMMODATION)
ALL 2016	£41.34	£16.81	£8.73	£7.15	£5.76	£3.06	£82.85	£41.51
STAYING	£41.34	£16.94	£8.60	£7.08	£5.72	£3.05	£82.73	£41.39
DAY	-	£13.77	£13.02	£9.25	£6.87	£3.26	£46.17	£46.17
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 2016

The South West Research Company Ltd

www.tswrc.co.uk

