

Isles of Scilly Steamship Group

Isles of Scilly Resident Consultation

February 2021

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# 1 Executive Summary

## 1.1 Introduction

The Isles of Scilly Steamship Group is working to replace the Scillonian III passenger ferry and the Gry Maritha, the freight vessel, to the Isles of Scilly. The company is consulting on the specification and design of a new passenger and freight ship, and associated service provision.

Isles of Scilly residents have been asked to submit responses to a survey to capture their views as part of a wider consultation. PFA Research, as an independent market research company, was commissioned to facilitate the survey and analysis of findings.

The survey opened on 5<sup>th</sup> August 2020 and the last response was received 7<sup>th</sup> September to allow analysis and reporting. A total of 373 valid responses were received and analysed, representing a response rate of approximately 20%<sup>1</sup>.

## 1.2 Conclusions

The estimated population for the Isles of Scilly (as at mid-2019) is 2,224 residents of which around 1,900 are adults aged 18 or over.

### 1.2.1 Scillonian III Journeys

The survey sample accounts for approximately 1,560 sailings on the Scillonian III annually, which represents around 7,730 passenger journeys per annum extrapolated to the full adult population.

On average, islanders forecast that over the next five years, the number of journeys they will make will increase conservatively by 28%. This is forecast across each of the sailing periods, summarised in the following table:

Sailing Period	Estimated journeys Now	Estimated journeys 5 years*	Increase
First sailing to 30th April	1,730	2,270	31%
1st May – 30th June	1,920	2,490	30%
1st July – 31st August	1,730	2,130	23%
1st September to last sailing	2,350	3,040	29%
<b>Total</b>	<b>7,730</b>	<b>9,920</b>	<b>28%</b>

\* Assumes those who say journeys will increase in any period will make just one additional journey in the period. Similarly, those who say journeys will decrease will make just one fewer journey.

In the main, the Scillonian III is used because it is the most cost-effective means of making the Islands to mainland crossing, and the most reliable in terms of being least likely to be disrupted by bad weather. Whilst environmental considerations are important for a quarter of survey respondents in choosing the Scillonian III over flying, only 3% state this as a main reason.

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<sup>1</sup> The survey invitation email was issued to Travel Club members who are residents of the Islands. There are approximately 1,900 residents aged 18 or over and this figure is used to estimate the response rate.

### 1.2.2 Freight to/from the mainland

The ability to reliably and safely send and receive freight is essential. Most (62%) value the reliability and the service provided by Gry Maritha crew members and quay hands (59%) and four in five survey respondents have used the freight service at least occasionally, with over 40% using it at least twice a month.

In terms of frequency and volumes of freight movements:

- Send/receive freight volumes will increase over the next five years, for a half of those using (and significantly increase for 16%).
- Sending freight is constituent to core activities for one in five businesses – and a quarter estimate the volume of their business freight will increase over the next five years.
- Over a third order frozen goods from the mainland, which has increased over the last five years for nearly half (46%). Of those ordering frozen goods, 29% expect the amount to increase over the next five years.
- The current availability of being able to send/receive freight three times a week is satisfactory for two thirds of users. A small proportion (8%) would value a daily service and pay a premium for it.

Occasional delays may be inevitable and most users (77%) have experienced a delay in goods being accepted onto the next sailing departing Penzance, at least once. 30% of those transporting larger goods inwards say they always experience delays in receiving them.

Four in ten purchase oil/kerosene from island suppliers, which is likely to increase for 14% of them over the next five years. Two thirds (65%) purchase unleaded or diesel fuel, of which 14% expect purchase levels will increase

### 1.2.3 Inter-island freight

The Lyonesse Lady is used for inter-island freight services by 30% of respondents. The existing level of service (six times weekly) is satisfactory for two thirds (68%), though a full quarter would accept a reduced service for reduced freight prices. The reliability of sailings and the regular scheduled service is what is most liked about the service.

Delays have been experienced at least occasionally by most, typically as a result of weather though sometimes as a result of mis-delivery to the wrong address or island, and some (30%) have experienced issues with the on-deck carrying capacity of the craft. Overall, most appear broadly satisfied with service, with a few frustrated when there has been a breakdown in service.

### 1.2.4 Views in consideration of a new service

Journey choice is a complex decision, which for many is a considered balance of timing, urgency, cost, criticality and purpose. 65% have at some time made an onward journey from Penzance Railway Station upon disembarking the Scillonian III. Based upon majority views, and experience of the Scillonian III, the sea crossing service should ideally:

- Be as quick as possible and within 90 minutes as preferred by almost two thirds (63%).
- Have a one-way journey cost in the range £40-£60, which would be acceptable for the vast majority of 79%.
- Offer a departure from St Mary's between 8am-12noon, three days a week (though just 13% would be likely to use this more than 10 times a year.
- Sail during December and January, for two thirds of survey respondents who would be likely to use it at least once during the period.

In consideration of a new vessel, a joint purpose (travel + freight) would be preferred by four in ten (41%) with a half (49%) indifferent to the proposal. Over half (57%) think environmental credentials are an important consideration when travelling or transporting goods.

For the Islands' economy, a winter boat service would encourage almost two thirds (64%) of business owners to open their businesses during one or more of the winter holiday markets: February half term (57%), Christmas Holidays (55%), during November (54%) and over the New Year (52%). These businesses are most commonly in holiday accommodation, hospitality and related (transport/logistics).

## 1.3 Key findings

The key findings from the survey questions are as follows.

### 1.3.1 Passenger profile

- The estimated population<sup>2</sup> for the Isles of Scilly mid-2019 is 2,224 residents, of which 337 are under 18 years of age. The survey respondent profile in terms of age fairly reflects the 18 and over population for Isles of Scilly, with a slight over-representation of those aged 35-65 and under-representation of those aged 18-34.
- 68% of respondents live on St Mary's.
- Whereas 76% of respondents living on St Mary's are aged 55 or over, across the other islands the figures decreased to 43%.
- The results include a number of respondents (7%) who are not resident on the Isles of Scilly, but are entitled to Travel Club membership due to their work/business interests on the Islands.
- 45% of respondents own a business on the Isles of Scilly. Among those, the most commonly represented business sector is holiday accommodation (43%).

### 1.3.2 Scillonian III – Travel frequency and habits

- Sailings on the Scillonian III are relatively evenly frequented throughout the sailing season, with a spike (at least 68% traveling at least once) during the period from September to the last sailing in early November, presumably as some island residents are less occupied following the summer holiday season.
- In 2019, 59% of respondents have travelled at least 3 times on the Scillonian III, 12% having travelled 10 or more times.
- Travel across the seasons is overall equal across residents of the different islands.
- The highest increase of times travelled over the next five (5) years is expected between 1 September and the last sailing (40%). The lowest increase registered for the period 1 July to 30 August, i.e. the main holiday season (27%).
- Respondents who did not travel on the Scillonian in 2019 are overall less like to increase that way of travelling over the next five (5) years. 25% said they envision an increase during the period from first sailing to 30<sup>th</sup> April, whereas 45% of those travelling 6 to 9 in 2019 are foreseeing an increase of travel by Scillonian.

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<sup>2</sup> Source: Office for National Statistics licensed under the Open Government Licence. Population estimates, mid-2019

- For the period 1 September to last sailing, 44% of those respondents travelling 6 to 9 times during 2019 can foresee and increase over the next five (5) years.
- 76% use the Scillonian III because it is less expensive than flying and for 44% of respondents this is the main reason for travelling by Scillonian III. 69% make the sea voyage as the service is less like to be disrupted by bad weather and for just over a third (34%) this is the main reason.
- Although nearly a quarter (23%) say they travel via Scillonian III as the more environmentally friendly option compared to flying, for only 3% of those is it the main reason for choosing to travel via Scillonian III.
- Travelling as quickly as possible is preferred by most respondents. 63% would prefer a fast crossing of 90 minutes and an additional 21% a crossing that takes less than 2½ hours. Only 3% would prefer a slow, cruise like journey.
- Over three quarters (79%) think costs between £40 to £60 for the crossing (one way) would be acceptable.
- For 85% of respondents leaving St Mary's between 8 am and 12 noon for up to three days per week is appealing. 47% said they would be likely to use the service 3 to 10 per year and 13% thought they would utilise the service more than 10 times per year. A quarter (25%) thought they would at least make use of the early sailing on one or two occasions per year.
- Likewise, if the ferry services would be offered during December and January, only a quarter (26%) of respondent thought they would not use the service at all. Two thirds (66%) thought they would use the service at least once during the period.
- For those who would not use the ferry service during December and January, the sea conditions (40%) and a preference for the Skybus service during the winter (41%) were the main reasons.
- If a winter boat service would encourage business owners to open their businesses during February half term (57%), the Christmas Holidays (55%), during November (54%) and over the New Year (52%). However, just over a third (36% said it would not encourage them to open/remain open).
- Most likely to open during at least one of the periods outside the current sailing times were businesses within the holiday accommodation sector and retail (76% each), transport/logistics (75%) and hospitality (62%).

### 1.3.3 Scillonian III – Facilities

- 43% of respondents ranked the quiet area as the most or second-most important when travelling on the Scillonian III, and the café/bar was ranked as the most or second-most important for 40%. Seats that fully recline were ranked in the top two by 36%, closely followed by Wi-Fi (35%).
- The reliability of service achieved the highest satisfaction net rating<sup>3</sup> (89%), closely followed by the service delivered by the on-board crew (88%) and the service provided by the on-shore staff (80%).

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<sup>3</sup> The Net score is calculated by subtracting the proportion of those responding 'not very' and 'not at all satisfied' from the proportion of those saying 'satisfied' and 'very satisfied'.

- Sailing times is the only area which scored a negative rating (-19%), meaning there more people dissatisfied/very dissatisfied (46%) with the service than satisfied/very satisfied (27%).
- Respondents were asked to consider what improvements they would like of a new vessel (in an ideal world, where budgets or other limitations are not a consideration). Respondents would most like to see consideration given to the improvement of the ship's motion during the voyage (89%) and improved vessel speed (87%).

#### 1.3.4 Onward Travel

- 65% of respondents have travelled by train from Penzance Railway Station after disembarking the Scillonian III as part of the same onward journey.
- Of those 65%, over half (55%) travel onward to a London train station.
- 50% of those travelling from Penzance Railway Station have used the Sleeper Service since the facilities at the station have been upgraded.
- Nearly two thirds (64%) of those traveling onward by train would like the option of upgrading their ticket to include transport from Penzance Quay to the railway station.

#### 1.3.5 Gry Maritha

- 16% of respondents have travelled on the Gry Maritha within the last 5 years.
- Of the 84% who have not, 38% have not done so because of the length of the journey.
- 20% of respondents who own a business on the Isles of Scilly say sending freight is part of their core business. Just over a quarter (26%) of the business owners think their levels of freight will increase over the next five (5) years, and 2% think it will decrease. For the remaining 72% the current levels will remain approximately the same.
- 81% of respondents have sent freight at least occasionally to/from the Isles of Scilly to the mainland. 43% have done so at least twice a month.
- Of those who send freight, 52% do as an individual as opposed to it being part of business activities (13%). 35% send as both an individual and for business purposes.
- 67% of those sending freight are happy with the current availability of being able to send/receive freight three times a week. 8% would be willing to pay a premium for being able to use the service daily; however, a quarter (25%) would accept a reduction in service and receive goods only once or twice a week if they saw freight prices reflect this change.
- 23% of those receiving freight find that their orders, on arrival at Penzance, are received on the next sailing departing Penzance. However, 77% have sometimes experienced a delay in goods being accepted onto the next sailing departing Penzance.
- Just over half (51%) of those sending/receiving freight expect the level of freight to increase over the next five (5) years. Of these, 16% expect a significant increase and 35% expect a marginal increase.
- Of those who order large goods, 64% experience delays (34% sometimes and 30% always) in receiving the goods. Only 16% were unable to send freight by sea to/from the mainland, which was due to the dimensions of the item (14%) or because of weight restrictions (2%).
- The reliability of the freight service is cited as the most liked aspect of the freight service (62%) followed by the service provided by crew members and quay hands (59%).



### 1.3.6 Frozen Goods

- 37% of respondents order frozen goods from the mainland, of which 31% have received damaged frozen goods within in the last 12 months.
- Nearly half (46%) of those ordering frozen goods say their volumes ordered have increased over the last 5 years, whereas nearly the same amount (49%) say orders have stayed approximately the same.
- Over the next five (5) years, 29% of those ordering frozen goods think the volume will increase and 69% expect the level to (approximately) remain the same.
- Of those respondents who purchase heating oil/kerosene from island suppliers (39% of respondents overall), 14% think the amount they purchase will increase over the next five (5) years, whereas 13% think the level will decrease. 72% expect the level to remain approximately the same.
- Of those respondents who purchase unleaded or diesel fuel from island suppliers (65% of respondents overall), 14% think their purchasing level will increase, while 9% think it will decrease. 78% expect the level to remain approximately the same.

### 1.3.7 Lyonesse Lady

- 30% of respondents use the Lyonesse Lady for inter-island freight services.
- Over two thirds (68%) of those sending inter-island freight are happy with being able to ship/receive freight up to six times a week. A quarter (25%) would accept a reduction in services and receive goods once or twice a week if freight prices reflect this change.
- Asked what they particularly like about the current inter-island freight services, the 'service provided' is liked by 68%, 63% like the reliability of sailings, closely followed by 62% who like the regular scheduled service.
- Over the past 12 months, 84% have experienced at least some delays when receiving goods via inter-island freight (not including delays due to the Covid-19 pandemic). Of these, 35% say they have seen delays 'sometimes' and 3% say they experiencing it 'all the time'.
- The delays experienced are mainly down to weather (45%) or the item being delivered to the wrong address or island (42%). However, 30% of those who have seen delays found that it was down to restrictions to the on-deck carrying capacity on the Lyonesse Lady.
- Of those sending inter-island freight, 25% order frozen food to be transported between the islands, of which 4% have seen an increase of orders over the past five (5) years; 4% have seen a decrease. However, over the next five (5) years, 39% are expecting an increase in orders, whereas 4% think the volume of orders will decrease.
- 64% of those sending inter-island freight also use the service to receive large goods and vehicles. Of those, 45% think the service provided by the Lyonesse Lady is good although there are sometimes restrictions. 30% find the Lyonesse Lady to provide a good service without any restrictions. However, 19% have experienced some level of frustration; 13% have been frustrated by the level of service capacity and having to wait, and for 6% it was waiting for the tide in order to receive deliveries.

### 1.3.8 Future Travel

- Over half (57%) of all respondents said that environmental considerations are important or very important when travelling and/or sending freight.
- 41% say they would prefer a joint ship for travel and freight. Nearly half of all valid respondents (48%) say they 'don't mind either way'
- Asked to select the most important from cost, duration or comfort; journey cost and journey duration were each cited by 40%, with 20% saying comfort.
- The importance of journey cost (compared to duration and comfort) increases with frequency of travel. Whereas 40% of those who travelled up to twice in 2019 saying it is the most important, the figure increased to 50% for those who have travelled 10 or more times in the same period. The importance of journey duration is relatively consistent across the journeys made and importance of comfort decreases.

## 2 Background

The Isles of Scilly Steamship Group is working to replace the Scillonian III passenger ferry to the Isles of Scilly. The company is consulting on the specification and design of a new passenger and freight ship, and associated service provision.

Isles of Scilly residents have been asked to submit responses to a survey to capture their views as part of a wider consultation. PFA Research, as an independent market research company, was commissioned to facilitate the survey and analysis of findings.

The survey was implemented through an online questionnaire, with participants invited to participate in the survey via an email sent to all Travel Club members issued directly by the Isles of Scilly Steamship Company. A paper version of the questionnaire was available to those who preferred to complete offline and return by post. The invitation email is provided as Appendix 1.

The survey opened on 5<sup>th</sup> August 2020 and the last response was received 7<sup>th</sup> September to allow analysis and reporting. Four responses were received by post. A total of 373 valid responses were received and analysed, representing a response rate of approximately 20%<sup>4</sup>.

This sections that follow present the detailed results of the survey.

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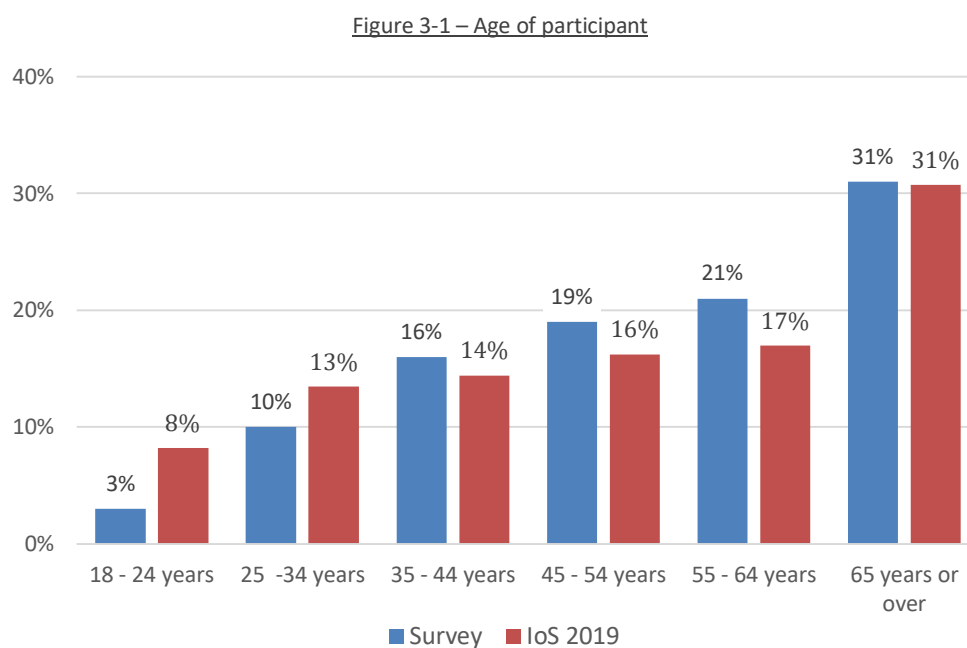
<sup>4</sup> The survey invitation email was issued to Travel Club members who are residents of the Islands. There are approximately 1,900 residents aged 18 or over and this figure is used to estimate the response rate.

## 3 Survey Results

### 3.1 Participant Profile

- The estimated population<sup>5</sup> for the Isles of Scilly mid-2019 is 2,224 residents, of which 337 are under 18 years of age. The survey respondent profile in terms of age fairly reflects the 18 and over population for Isles of Scilly, with a slight over-representation of those aged 35-65 and under-representation of those aged 18-34.
- 68% of respondents live on St Mary's.
- Whereas 76% of respondents living on St Mary's are aged 55 or over, across the other islands the figures decreased to 43%.
- The results include a number of respondents (7%) who are not resident on the Isles of Scilly, but are entitled to Travel Club membership due to their work/business interests on the Islands.
- 45% of respondents own a business on the Isles of Scilly. Among those, the most commonly represented business sector is holiday accommodation (43%).

#### Q: What is your age?

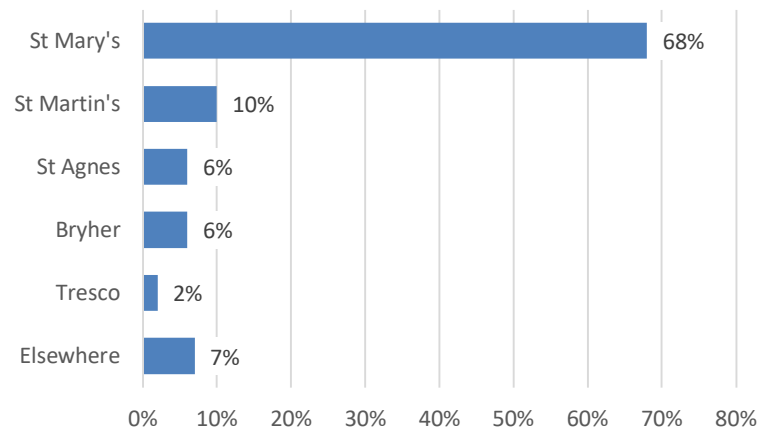


Base: All valid respondents, n=373

<sup>5</sup> Source: Office for National Statistics licensed under the Open Government Licence. Population estimates, mid-2019

## Q: Where do you live?

Figure 3-2 – Residence



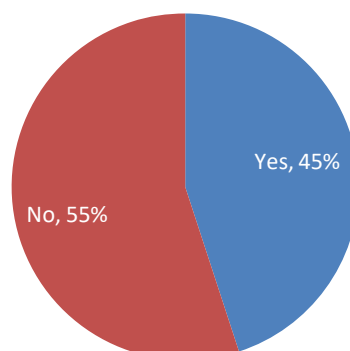
Base: All valid respondents, n=371

Table 3-1 – Age by Residency

	Total	St Mary's	Other Islands	Mainland
Base	373	254	90	27
18 to 24	3%	1%	4%	15%
25 to 34	10%	10%	10%	7%
35 to 44	16%	13%	26%	7%
45 to 54	19%	19%	17%	15%
55 to 64	21%	23%	14%	30%
65 or over	31%	33%	29%	26%

## Q: Do you own a business on the Isles of Scilly?

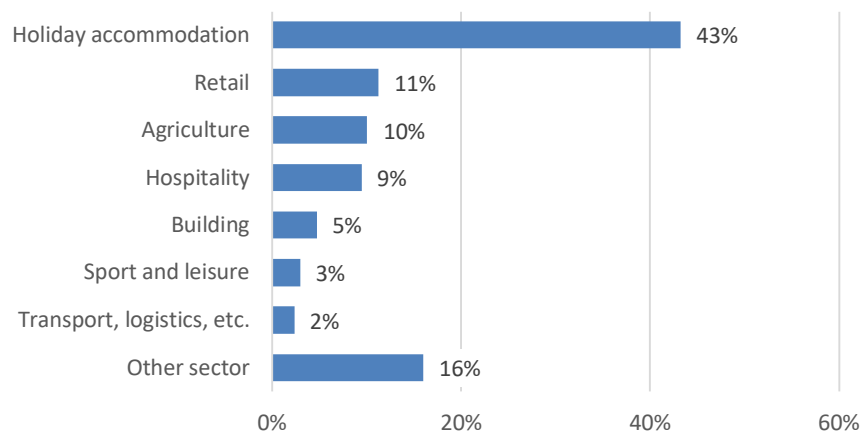
Figure 3-3 – Business Owner



Base: All valid respondents, n=372

**Q: Which of the sectors below best represents your business?**

Figure 3-4 – Business Sector



Base: Those who run a business, n=169

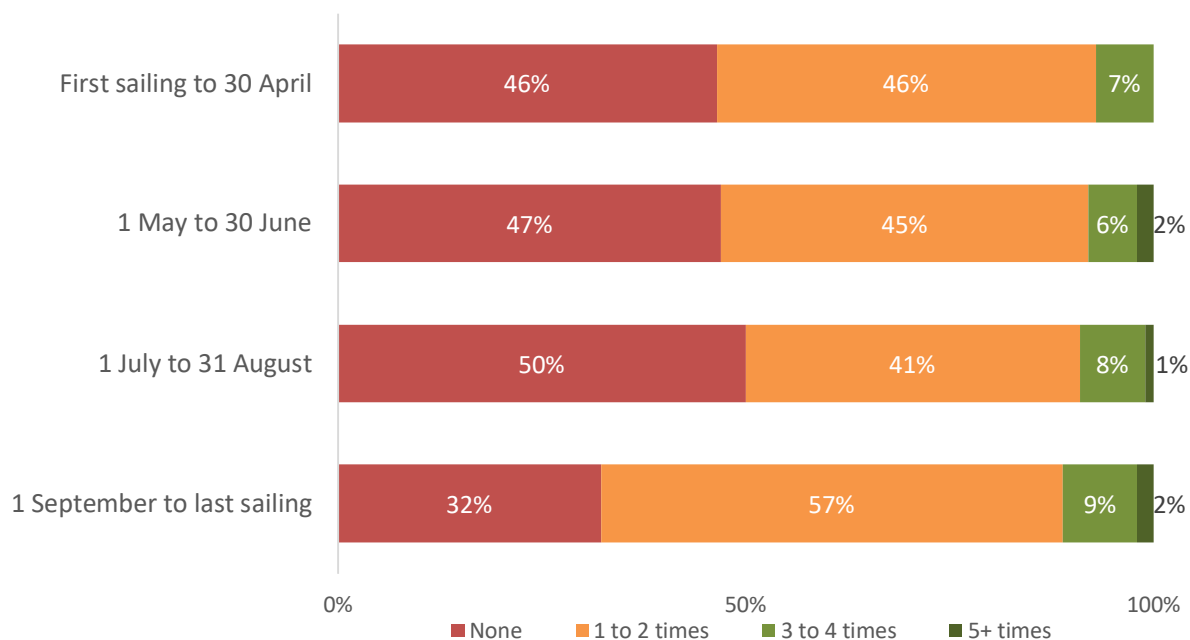
## 3.2 Scillonian III – Travel frequency and habits

- Sailings on the Scillonian III are relatively evenly frequented throughout the sailing season, with a spike (at least 68% traveling at least once) during the period from September to the last sailing in early November, presumably as some island residents are less occupied following the summer holiday season.
- In 2019, 59% of respondents have travelled at least 3 times on the Scillonian III, 12% having travelled 10 or more times.
- Travel across the seasons is overall equal across residents of the different islands.
- The highest increase of times travelled over the next five (5) years is expected between 1 September and the last sailing (40%). The lowest increase registered for the period 1 July to 30 August, i.e. the main holiday season (27%).
- Respondents who did not travel on the Scillonian in 2019 are overall less like to increase that way of travelling over the next five (5) years. 25% said they envision an increase during the period from first sailing to 30<sup>th</sup> April, whereas 45% of those travelling 6 to 9 in 2019 are foreseeing an increase of travel by Scillonian.
- For the period 1 September to last sailing, 44% of those respondents travelling 6 to 9 times during 2019 can foresee and increase over the next five (5) years.
- 76% use the Scillonian III because it is less expensive than flying and for 44% of respondents this is the main reason for travelling by Scillonian III. 69% make the sea voyage as the service is less like to be disrupted by bad weather and for just over a third (34%) this is the main reason.
- Although nearly a quarter (23%) say they travel via Scillonian III as the more environmentally friendly option compared to flying, for only 3% of those is it the main reason for choosing to travel via Scillonian III.
- Travelling as quickly as possible is preferred by most respondents. 63% would prefer a fast crossing of 90 minutes and an additional 21% a crossing that takes less than 2 ½ hours. Only 3% would prefer a slow, cruise like journey.
- Over three quarters (79%) think costs between £40 to £60 for the crossing (one way) would be acceptable.
- For 85% of respondent leaving St Mary's between 8 am and 23 noon for up to three days per week is appealing. 47% said they would be likely to use the service 3 to 10 per year and 13% thought they would utilise the service more than 10 times per year. A quarter (25%) thought they would at least make use of the early sailing on one or two occasions per year.
- Likewise, if the ferry services would be offered during December and January, only a quarter (26%) of respondent thought they would not use the service at all. Two thirds (66%) thought they would use the service at least once during the period.
- For those who would not use the ferry service during December and January, the sea conditions (40%) and a preference for the Skybus service during the winter (41%) were the main reasons.
- If a winter boat service would encourage business owners to open their businesses during February half term (57%), the Christmas Holidays (55%), during November (54%) and over the New Year (52%). However, just over a third (36% said it would not encourage them to open/remain open).

- Most likely to open during at least one of the periods outside the current sailing times were businesses within the holiday accommodation sector and retail (76% each), transport/logistics (75%) and hospitality (62%).

**Q: We are trying to understand the current and future travel frequency on the Scillonian III during the spring, summer and autumn. Please tell us how many times you sailed on the Scillonian III during each of the following periods in 2019: Please enter the number of times for each.**

Figure 3-5 – Travel Frequency in 2019



Base: All valid respondents, n=373

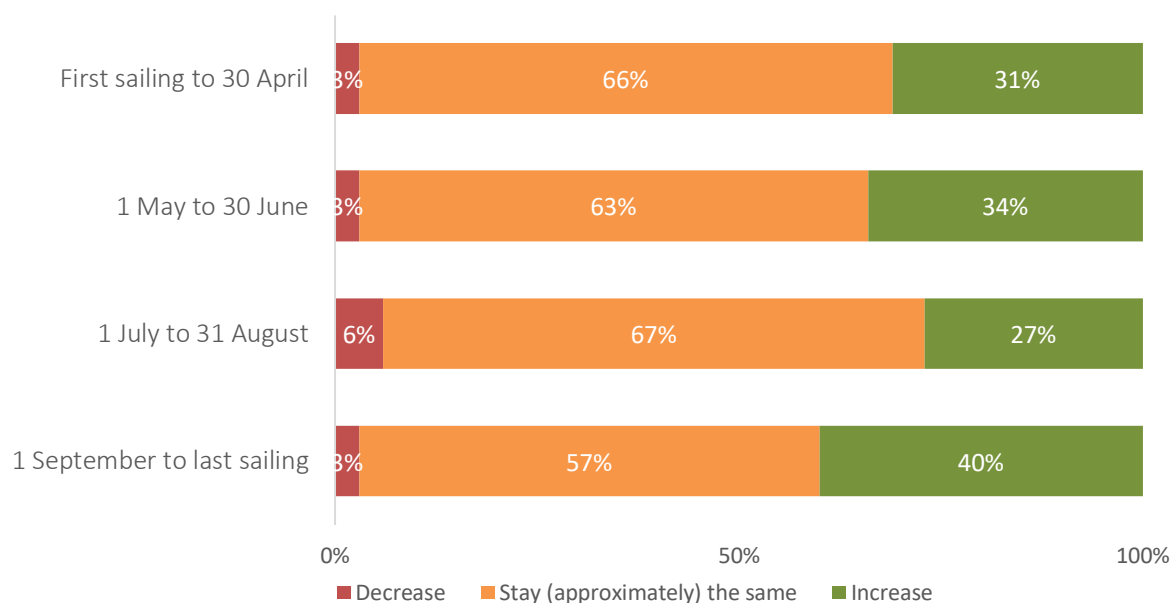
Table 3-2 – Times Travelled by Residency

	Total	St Mary's	Other Islands	Mainland
Base	373	254	90	27
None	17%	15%	17%	33%
1 to 2	24%	22%	24%	41%
3 to 5	30%	30%	34%	19%
6 to 9	17%	20%	13%	7%
10 or more	12%	13%	11%	0%



**Q: Over the next 5 years, do you anticipate that the number of journeys you will make during these periods will increase, stay (approximately) the same or decrease?**

Figure 3-6 – Future Travel



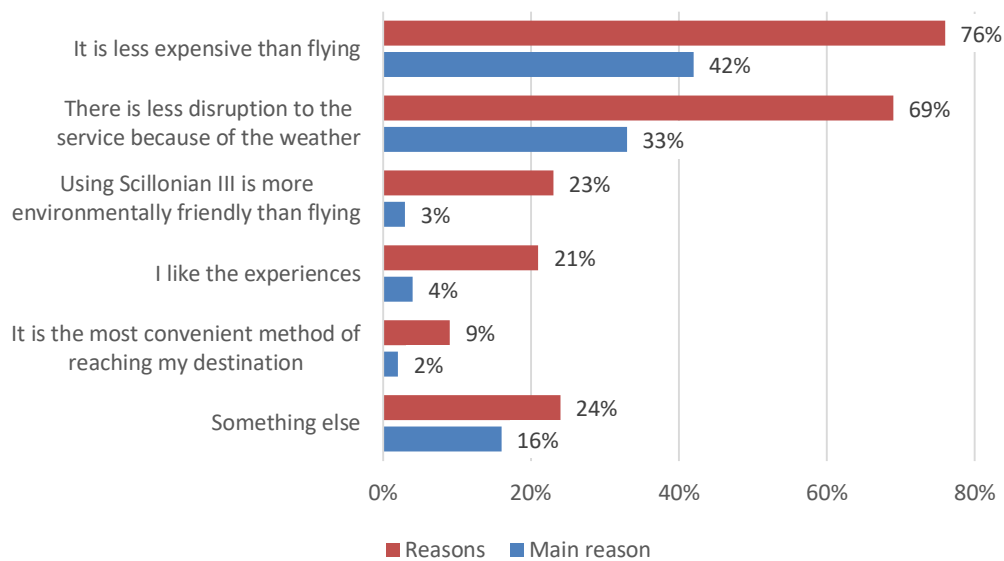
Base: All valid respondents, n=373

Table 3-3 – Increase/Decrease in Journeys by Times Travelled

	Total	None	1 to 2	3 to 5	6 to 9	10 or more
Base	373	64	90	111	64	44
<b>First sailing to 30 April</b>						
Increase	31%	25%	30%	26%	<b>45%</b>	34%
Stay the same	66%	<b>73%</b>	67%	71%	52%	64%
Decrease	3%	2%	3%	3%	3%	2%
<b>1 May to 30 June</b>						
Increase	34%	30%	<b>41%</b>	29%	38%	34%
Stay the same	63%	<b>69%</b>	57%	67%	59%	61%
Decrease	3%	2%	2%	5%	3%	5%
<b>1 July to 31 August</b>						
Increase	27%	22%	<b>32%</b>	22%	30%	<b>32%</b>
Stay the same	67%	<b>75%</b>	63%	72%	59%	64%
Decrease	6%	3%	4%	6%	11%	5%
<b>1 September to last sailing</b>						
Increase	40%	36%	42%	40%	<b>44%</b>	41%
Stay the same	57%	<b>63%</b>	52%	59%	55%	57%
Decrease	3%	2%	6%	2%	2%	2%

**Q: Why do you travel by the Scillonian III? Of those, which is your main reason for travelling on the Scillonian III?**

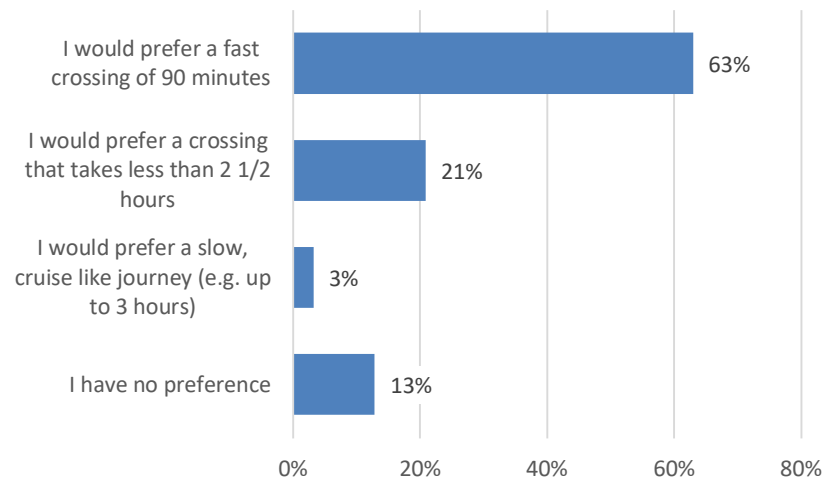
Figure 3-7 – Reason for Travelling



Base: All valid respondents, n= 373 / n=370

**Q: Which of the following would best describe your preference when travelling to the Isles of Scilly?**

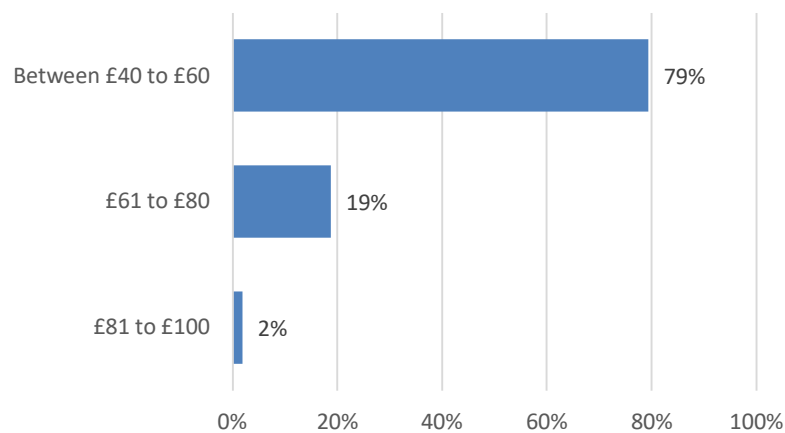
Figure 3-8 – Travelling Preference



Base: All valid respondents, n=373

**Q: In your opinion, what would be acceptable costs for a passenger ticket (one way) to the Isles of Scilly?**

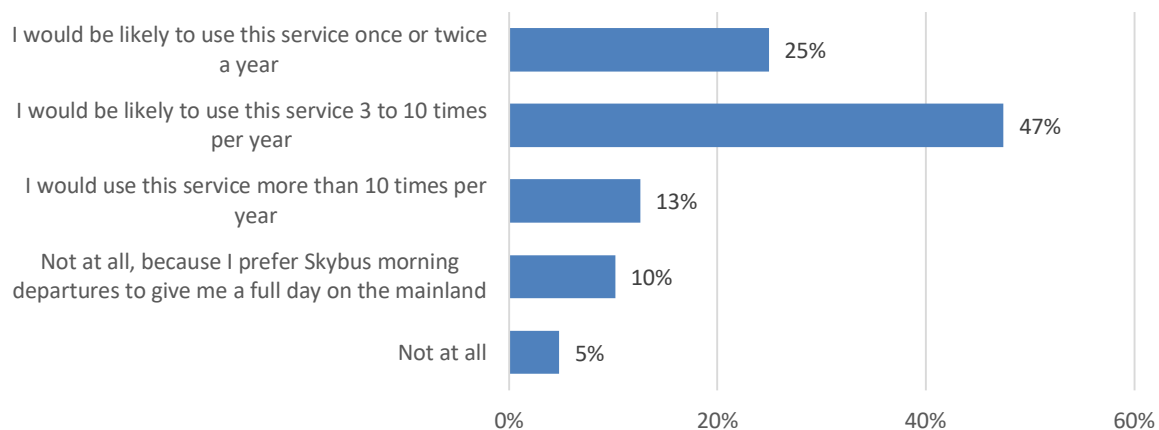
Figure 3-9 – Ticket Prices



Base: All valid respondents, n=373

**Q: Currently, the Scillonian III service departing 9.15 am from Penzance and departing 4.30 pm from St Mary's accommodates the islands' day trip market. Please tell us how attractive it would be to you personally to have the ability to leave St Mary's three days a week between 8 am and 12 noon?**

Figure 3-10 – Leaving St Mary's Early Morning



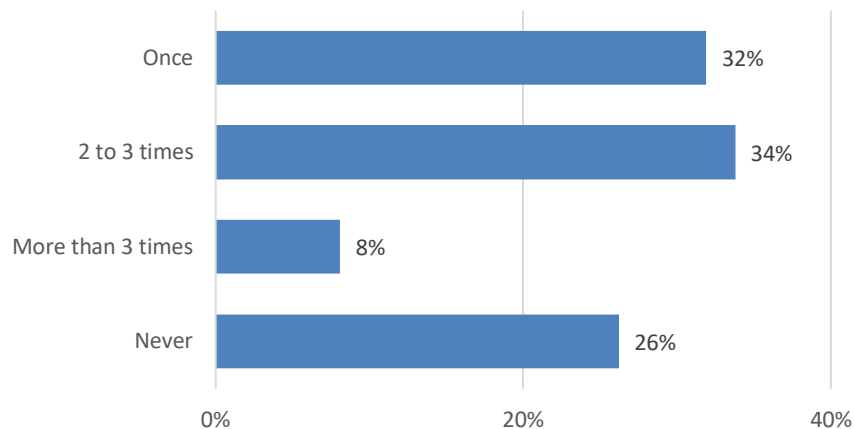
Base: All valid respondents, n=373

Table 3-4 – Early Morning Departure by Time Travelled

	Total	None	1 to 2	3 to 5	6 to 9	10 or more
Base	373	64	90	111	64	44
I would be likely to use this service once or twice a year	25%	36%	34%	28%	8%	7%
I would be likely to use this service 3 to 10 times per year	47%	19%	43%	55%	61%	59%
I would use this service more than 10 times per year	13%	2%	4%	10%	25%	34%
Not at all, because I prefer Skybus morning departures to give me a full day on the mainland	10%	33%	10%	5%	3%	0%
Not at all	5%	11%	8%	2%	3%	0%

**Q: If a ferry passenger service was offered in December and January for businesses and accommodation providers (without applying Travel Club rates), how many times do you think you would use the service over the period?**

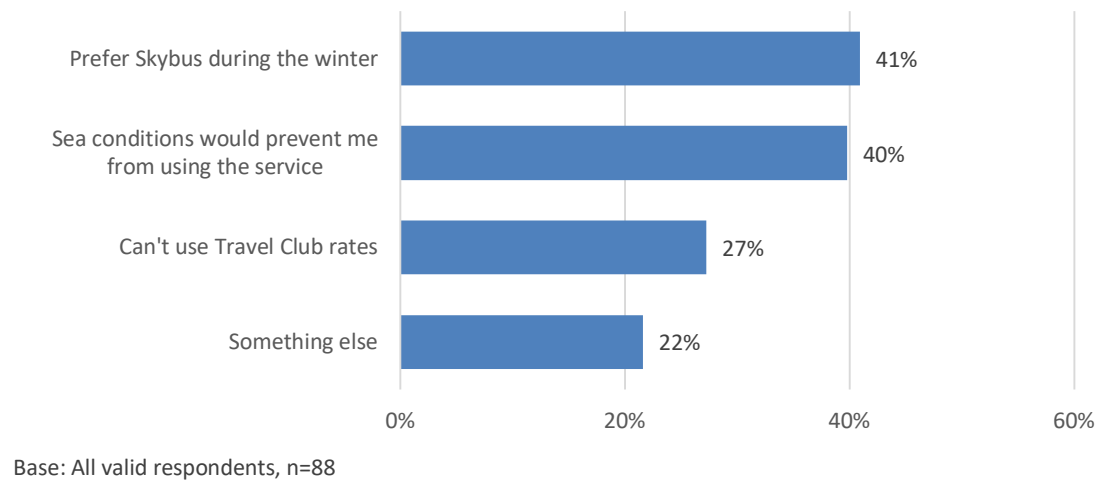
Figure 3-11 – Ferry Serviced Winter Usage



Base: All valid respondents, n=370

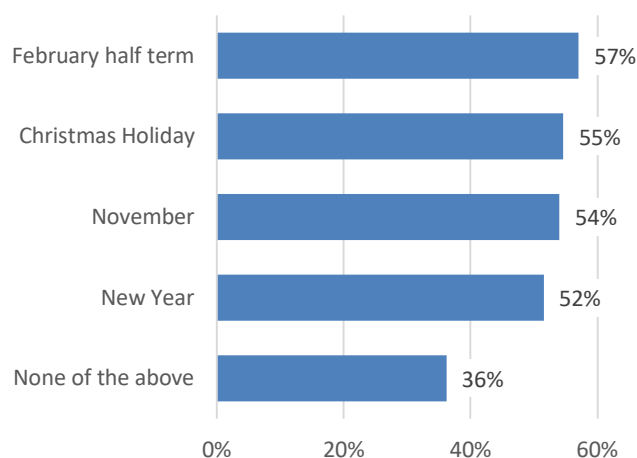
**Q: Why would you not use a ferry service during December and January?**

Figure 3-12 – Reason for Non-Winter Usage



**Q: [Business Owners only] - Would a winter boat service encourage you to open your business for any of the following periods? Please tick all that apply.**

Figure 3-13 – Winter Boat Service (Business Owners Only)



Base: Those owning a business, n=163

Table 3-5 – Winter Opening by Industry Sector

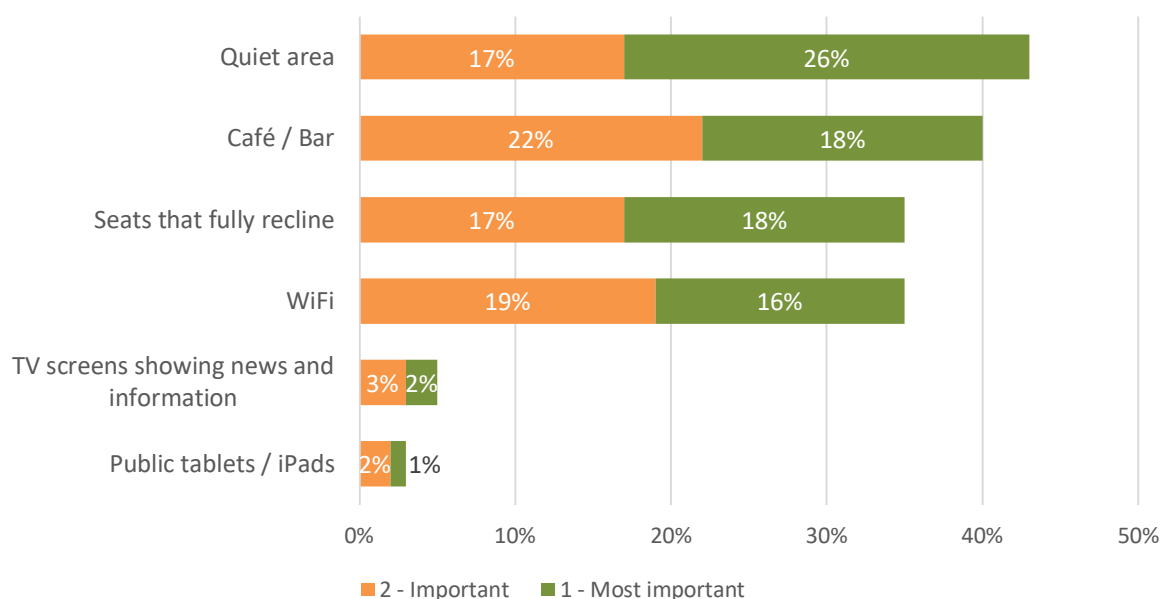
	Total	Holiday accommodation	Hospitality	Retail	Sport and Leisure	Transport, logistics	Building	Agriculture	Other sector
Base	163	72	16	17	5	4	8	16	25
November	54%	65%	63%	65%	40%	50%	13%	19%	48%
Christmas Holiday	55%	64%	56%	71%	60%	50%	13%	38%	40%
New Year	52%	60%	50%	76%	60%	50%	13%	38%	32%
February half term	57%	71%	63%	71%	60%	-	13%	25%	48%
None of the above	36%	24%	38%	24%	40%	25%	88%	63%	48%

### 3.3 Scillonian III – Facilities

- 43% of respondents ranked the quiet area as the most or second-most important when travelling on the Scillonian III, and the café/bar was ranked as the most or second-most important for 40%. Seats that fully recline were ranked in the top two by 36%, closely followed by Wi-Fi (35%).
- The reliability of service achieved the highest satisfaction net rating<sup>6</sup> (89%), closely followed by the service delivered by the on-board crew (88%) and the service provided by the on-shore staff (80%).
- Sailing times is the only area which scored a negative rating (-19%), meaning there more people dissatisfied/very dissatisfied (46%) with the service than satisfied/very satisfied (27%).
- Respondents were asked to consider what improvements they would like of a new vessel (in an ideal world, where budgets or other limitations are not a consideration). Respondents would most like to see consideration given to the improvement of the ship's motion during the voyage (89%) and improved vessel speed (87%).

**Q: Please rank the following facilities in order of importance, scoring 1 for the most important and 6 for the least important, when travelling on the Scillonian III?**

Figure 3-14 – Importance of Facilities

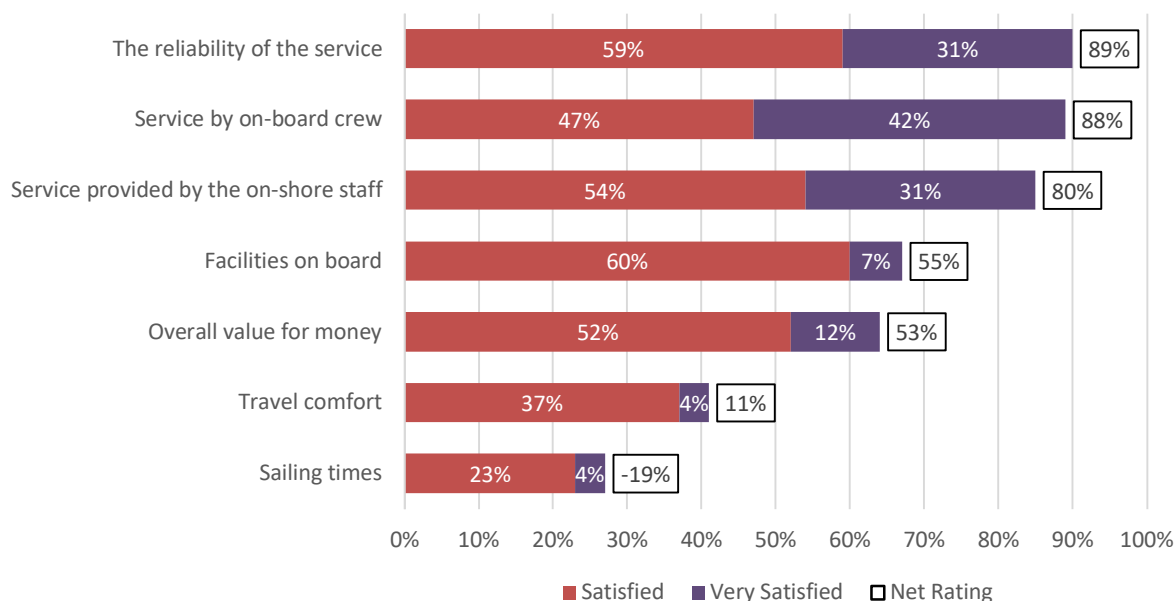


Base: All valid respondents, n=373

<sup>6</sup> The Net score is calculated by subtracting the proportion of those responding 'not very' and 'not at all satisfied' from the proportion of those saying 'satisfied' and 'very satisfied'.

**Q: How satisfied or dissatisfied are you with the following services on the Scillonian III?**

Figure 3-15 – Service Ratings – Satisfied/Very Satisfied



Base: Those travelling via Scillonian III, n=356 / 355 / 353 / 355 / 351 / 357 / 357

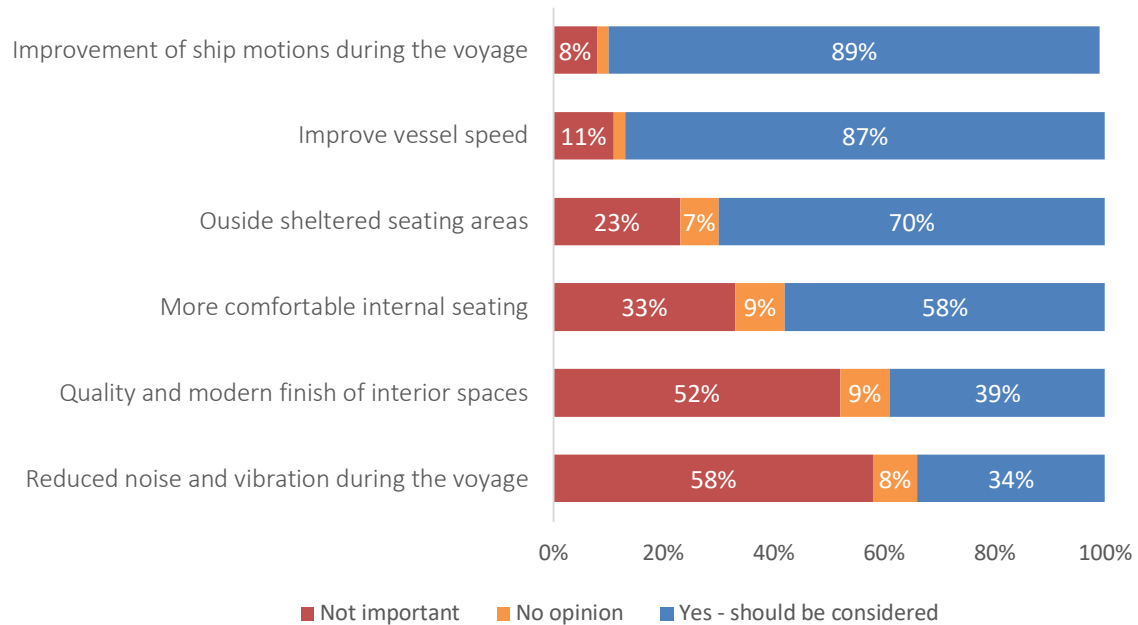
Table 3-6 – Services Rating

	Base	Very dissatisfied	Dissatisfied	Neither satisfied or dissatisfied	Satisfied	Very satisfied	Net satisfaction
The reliability of the service	356	1%	1%	7%	59%	31%	<b>89%</b>
Service provided by on-board crew	355	0%	0%	10%	47%	42%	<b>88%</b>
Service by the on-shore staff	353	0%	5%	10%	54%	31%	<b>80%</b>
Facilities on board	355	1%	10%	22%	60%	7%	<b>55%</b>
Overall value for money	351	2%	9%	25%	52%	12%	<b>53%</b>
Travel comfort	357	10%	20%	28%	37%	4%	<b>11%</b>
Sailing times	357	12%	34%	27%	23%	4%	<b>-19%</b>



**Q: In an ideal world, where budgets or other limitations are not a consideration, which of the following should be considered for a new vessel?**

Figure 3-16 – New Vessel Considerations



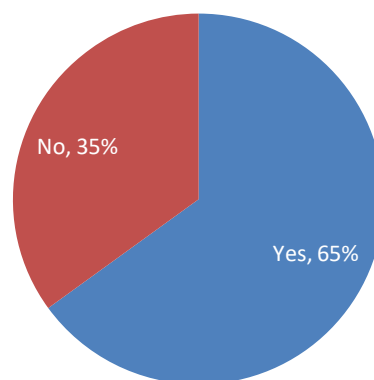
Base: Those travelling via Scillonian III, n=365 / 370 / 365 / 363 / 363 / 365

### 3.4 Onward Travel

- 65% of respondents have travelled by train from Penzance Railway Station after disembarking the Scillonian III as part of the same onward journey.
- Of those 65%, over half (55%) travel onward to a London train station.
- 50% of those travelling from Penzance Railway Station have used the Sleeper Service since the facilities at the station have been upgraded.
- Nearly two thirds (64%) of those traveling onward by train would like the option of upgrading their ticket to include transport from Penzance Quay to the railway station.

**Q: In the past 5 years, after disembarking from the Scillonian III, have you travelled by train from Penzance Railway Station (as part of the same onward journey)?**

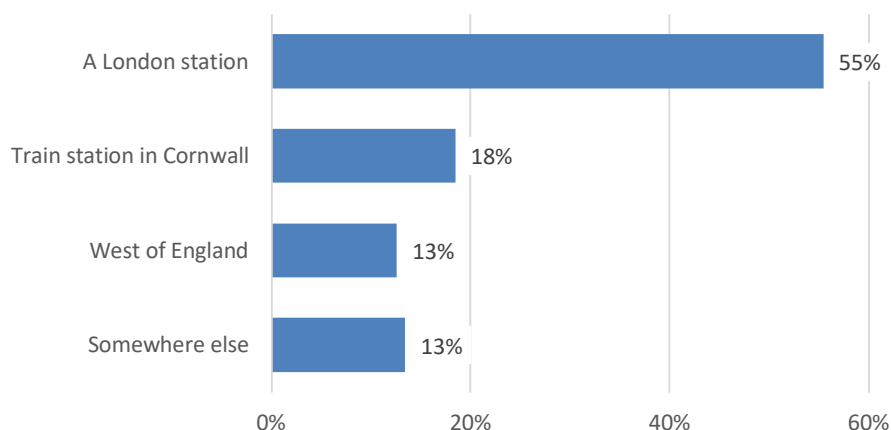
Figure 3-17 – Penzance Railway Station



Base: All valid respondents, n=373

**Q: Where does your onward train journey usually end?**

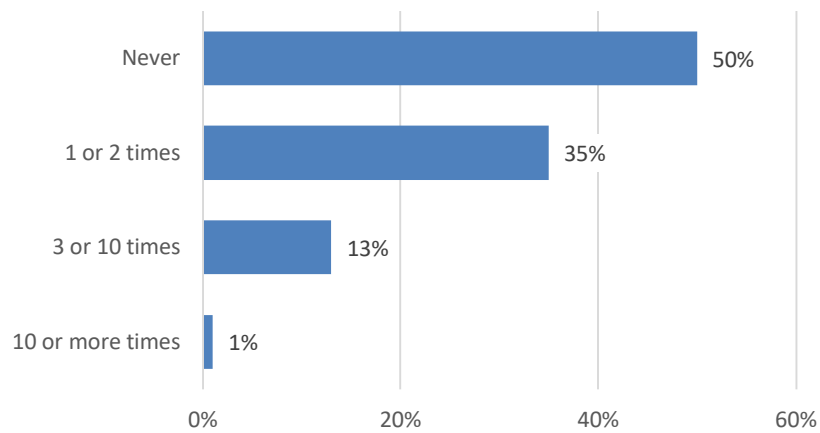
Figure 3-18 – Onward Journey



Base: Those with onward train journey, n=238

**Q: Since the upgrades to the facilities at Penzance Railway Station 12 months ago, how often have you used the sleeper service?**

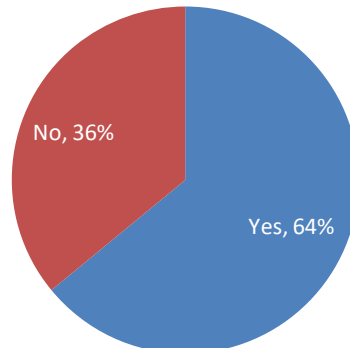
Figure 3-19 – Sleeper Service Used



Base: Those with onward train journey, n=243

**Q: Would you like the option of being able to upgrade your ticket to include transport from Penzance Quay to the railway station?**

Figure 3-20 – Ticket Upgrade



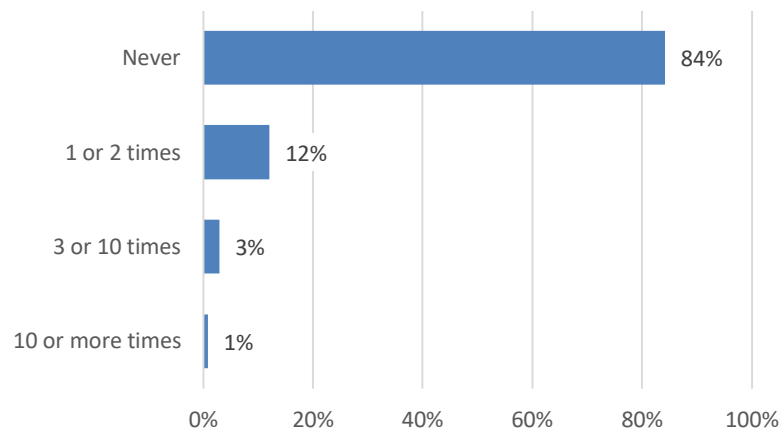
Base: Those with onward train journey, n=242

### 3.5 Gry Maritha

- 16% of respondents have travelled on the Gry Maritha within the last 5 years.
- Of the 84% who have not, 38% have not done so because of the length of the journey.
- 20% of respondents who own a business on the Isles of Scilly say sending freight is part of their core business. Just over a quarter (26%) of the business owners think their levels of freight will increase over the next five (5) years, and 2% think it will decrease. For the remaining 72% the current levels will remain approximately the same.
- 81% of respondents have sent freight at least occasionally to/from the Isles of Scilly to the mainland. 43% have done so at least twice a month.
- Of those who send freight, 52% do as an individual as opposed to it being part of business activities (13%). 35% send as both an individual and for business purposes.
- 67% of those sending freight are happy with the current availability of being able to send/receive freight three times a week. 8% would be willing to pay a premium for being able to use the service daily; however, a quarter (25%) would accept a reduction in service and receive goods only once or twice a week if they saw freight prices reflect this change.
- 23% of those receiving freight find that their orders, on arrival at Penzance, are received on the next sailing departing Penzance. However, 77% have sometimes experienced a delay in goods being accepted onto the next sailing departing Penzance.
- Just over half (51%) of those sending/receiving freight expect the level of freight to increase over the next five (5) years. Of these, 16% expect a significant increase and 35% expect a marginal increase.
- Of those who order large goods, 64% experience delays (34% sometimes and 30% always) in receiving the goods. Only 16% were unable to send freight by sea to/from the mainland, which was due to the dimensions of the item (14%) or because of weight restrictions (2%).
- The reliability of the freight service is cited as the most liked aspect of the freight service (62%) followed by the service provided by crew members and quay hands (59%).

**Q: Over the past 5 years, how many times have you travelled on the Gry Maritha?**

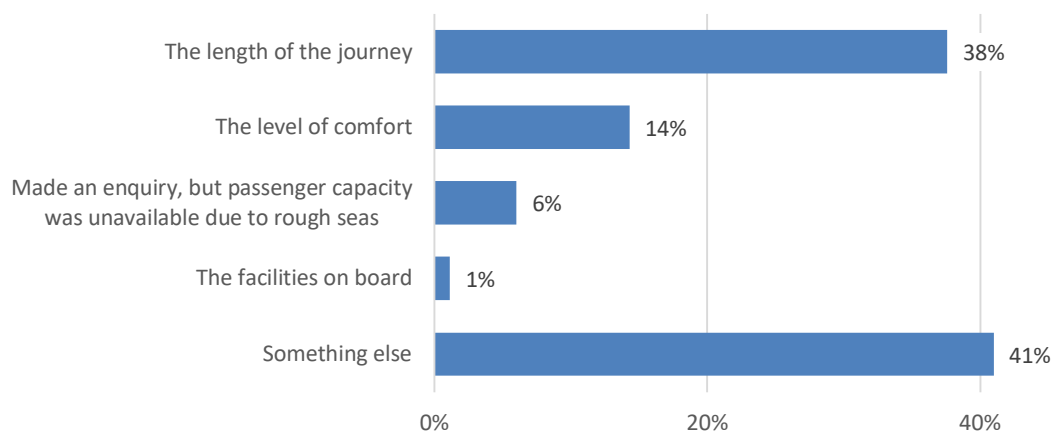
Figure 3-21 – Gry Maritha Travel Frequency



Base: All valid respondents, n=373

**Q: What is your main reason for not using the Gry Maritha for travel within the last five years?**

Figure 3-22 – Reasons for not Travelled on Gry Maritha

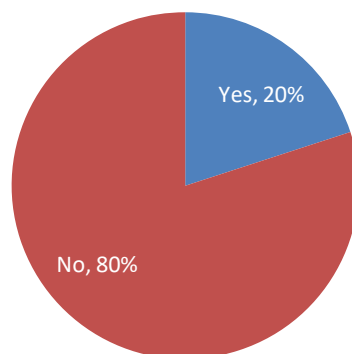


Base: Those not travelling on Gry Maritha, n=266

For those saying 'something else' the main reasons were that the need to travel on the Gry Matitha had not arisen or the respondent did not know this was an option.

**Q: Is it part of your core business to send freight by sea from the Isles of Scilly to the mainland?**

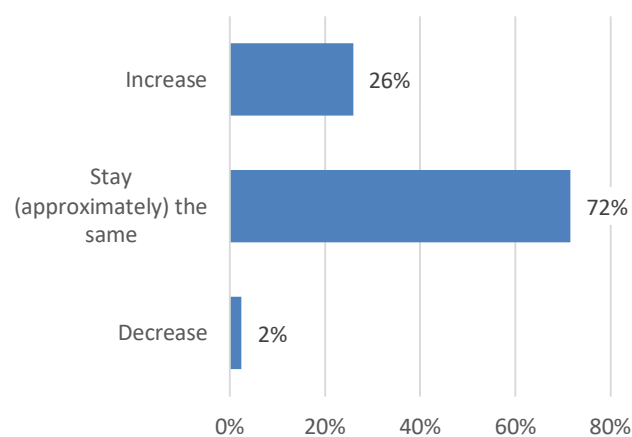
Figure 3-23 – Freight as Core Business



Base: Those owning a business, n=169

**Q: Over the next 5 years, do you expect the levels of freight sent by sea to the mainland to...?**

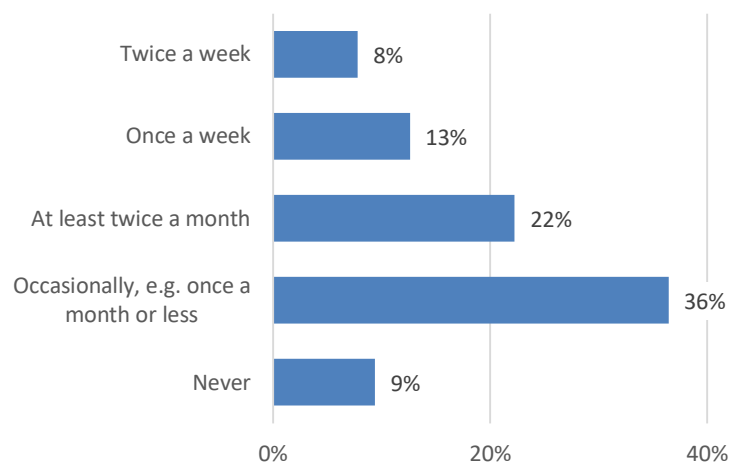
Figure 3-24 – Future Freight by Sea



Base: Those owning a business, n=162

**Q: How often do you use the freight by sea service with the Isles of Scilly Steamship Company from/to the mainland?**

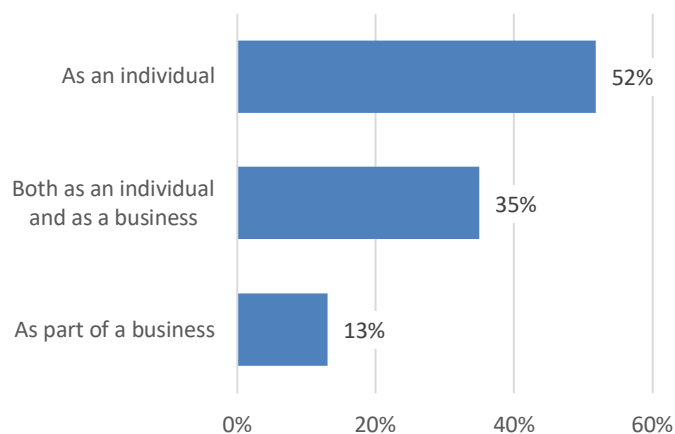
Figure 3-25 – Freight Serviced Used



Base: All valid respondents, n=373

**Q: Do you send freight by sea to/from the mainland...?**

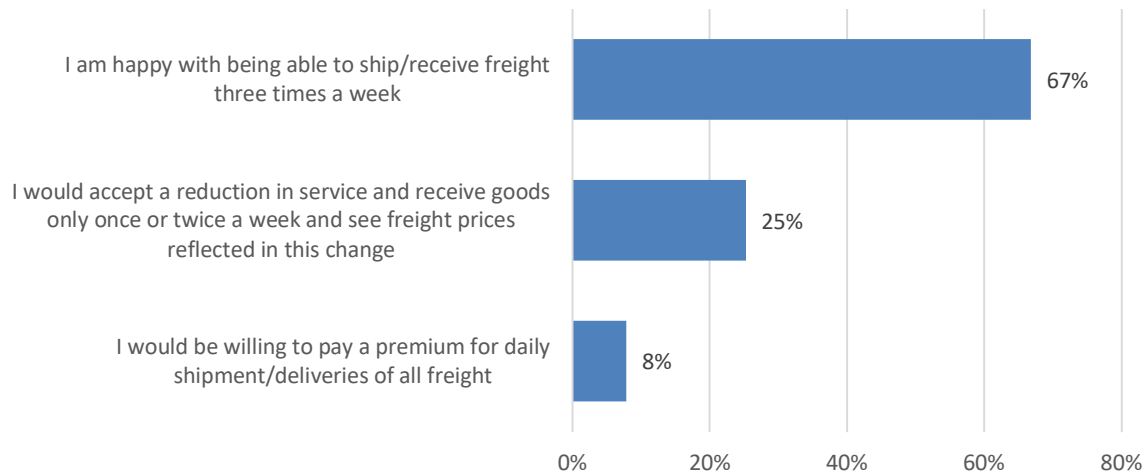
Figure 3-26 – Residential or Business Freight



Base: Those who send freight by sea, n=320

**Q: Which one of the following statements best describes your preference in relation to sending freight by sea to/from the mainland?**

Figure 3-27 – Preference of Frequency of Freight Delivery

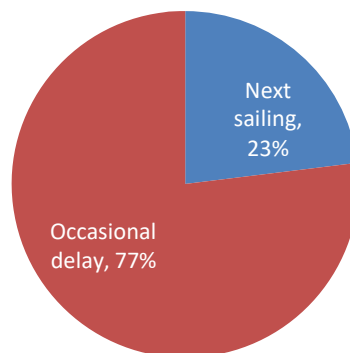


Base: Those who send freight by sea, n=320

**Q: Based on the current freight service provided by the Gry Maritha, would you say that...**

- a) My orders, on arrival at Penzance, are received on the next sailing departing Penzance?
- b) There is sometimes a delay in goods being accepted onto the next sailing departing Penzance'?

Figure 3-28 – Delays

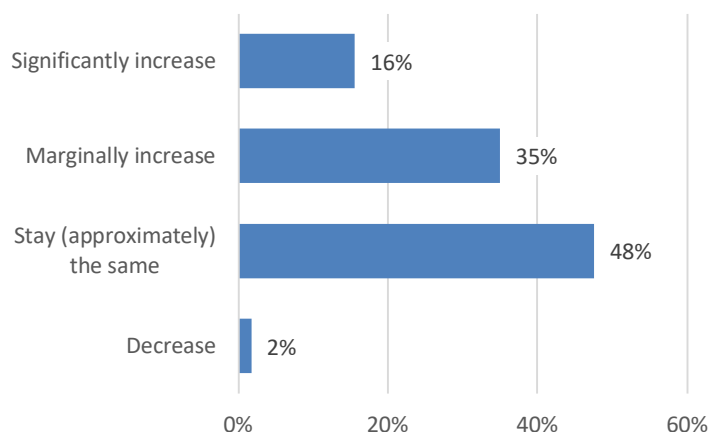


Base: Those who send freight by sea, n=169



**Q: Over the next five years, do you expect the level of freight being ordered by sea to...?**

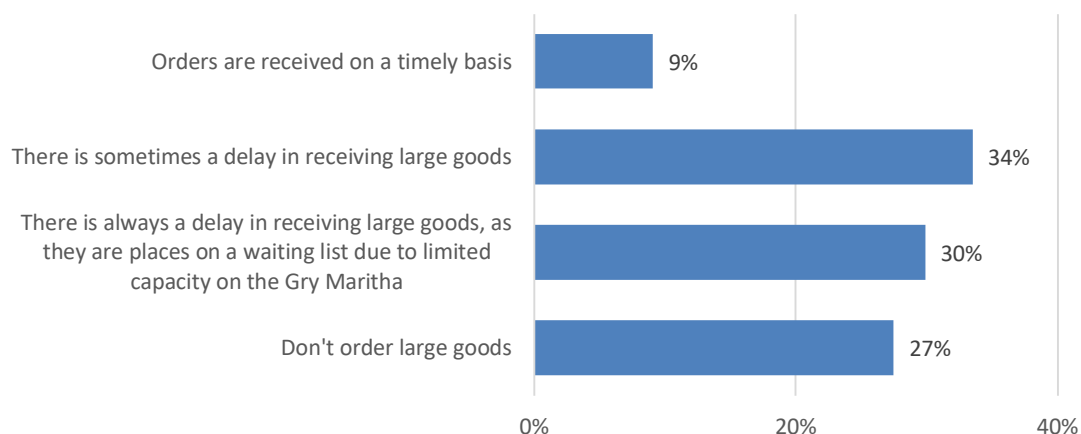
Figure 3-29 – Future Freight



Base: Those who send freight by sea, n=334

**Q: Based on the current freight service provided by the Gry Maritha when ordering large goods (e.g. vehicles, skips, etc.), which of the following best describes your experience?**

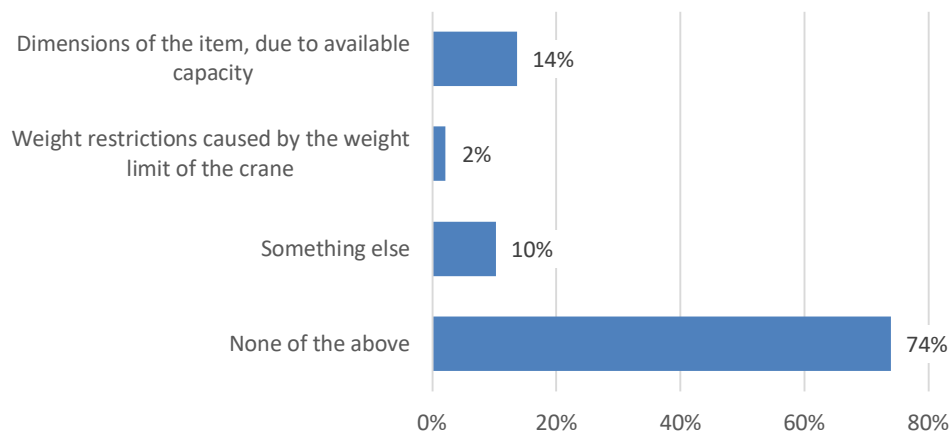
Figure 3-30 – Experience with Large Goods



Base: Those who send freight by sea, n=331

**Q: In the last 12 months have you been unable to send freight by sea to/from the mainland due to restrictions in...? Please exclude any restrictions due to Covid-19/Coronavirus lockdown.**

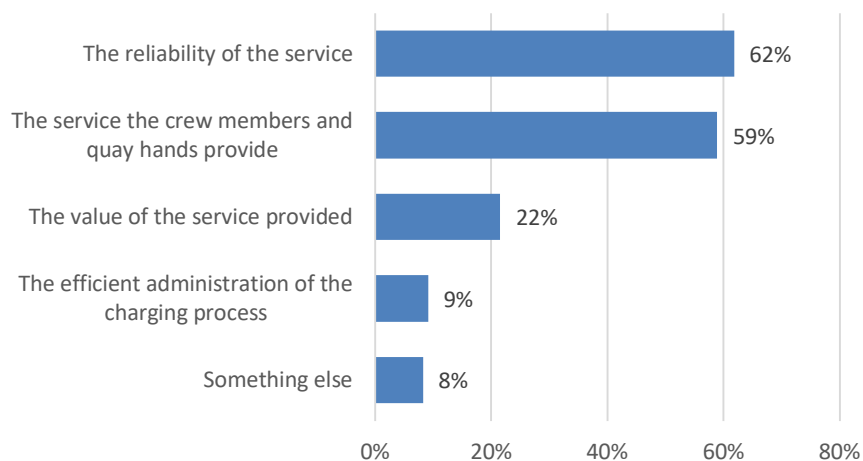
Figure 3-31 – Freight Restrictions



Base: Those who send freight by sea, n=322

**Q: What do you like about the existing freight service to/from the mainland?**

Figure 3-32 – Freight Service Positives



Base: Those who send freight by sea, n=241

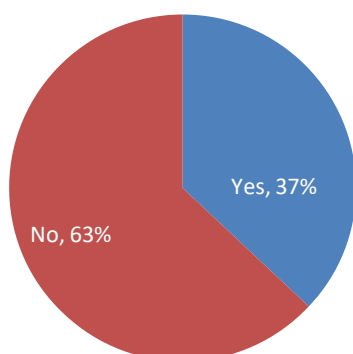
### 3.6 Frozen goods

- 37% of respondents order frozen goods from the mainland, of which 31% have received damaged frozen goods within in the last 12 months.
- Nearly half (46%) of those ordering frozen goods say their volumes ordered have increased over the last 5 years, whereas nearly the same amount (49%) say orders have stayed approximately the same.
- Over the next five (5) years, 29% of those ordering frozen goods think the volume will increase and 69% expect the level to (approximately) remain the same.
- Of those respondents who purchase heating oil/kerosene from island suppliers (39% of respondents overall), 14% think the amount they purchase will increase over the next five (5) years, whereas 13% think the level will decrease. 72% expect the level to remain approximately the same.
- Of those respondents who purchase unleaded or diesel fuel from island suppliers (65% of respondents overall), 14% think their purchasing level will increase, while 9% think it will decrease. 78% expect the level to remain approximately the same.

**Q: Do you order frozen goods from the mainland?**

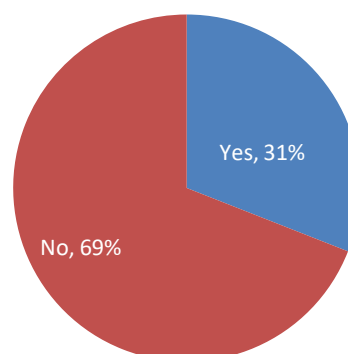
**Q: Within the last 12 months, have you received any damaged frozen freight from the mainland?**

Figure 3-33 – Order Frozen Goods



Base: All valid respondents, n=373

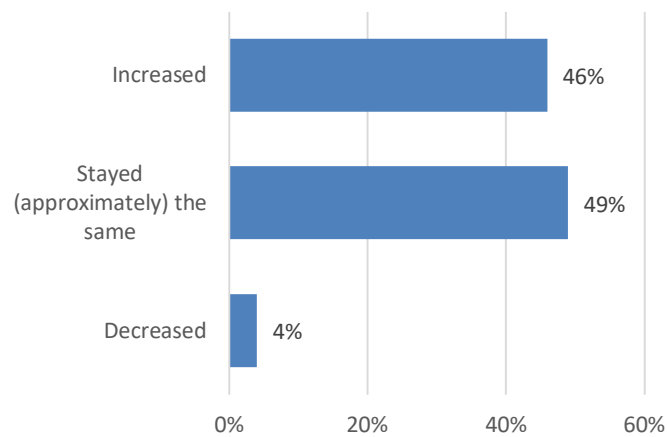
Figure 3-34 – Received Damaged Frozen Goods



Base: Those ordering frozen goods, n=138

**Q: Over the past 5 years, have the volumes of frozen goods you have ordered from the mainland...?**

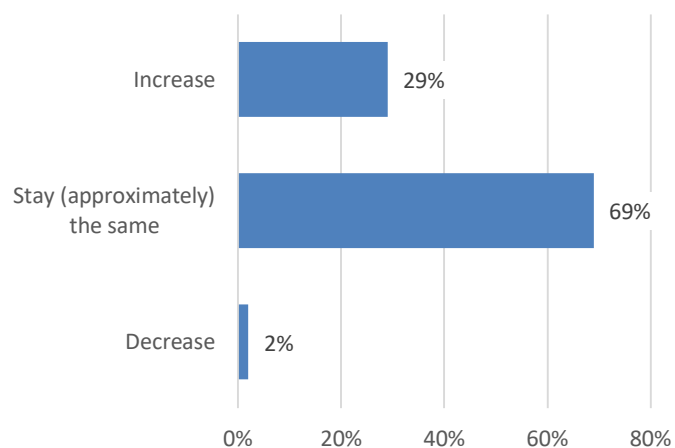
Figure 3-35 – Past Frequency of Frozen Goods



Base: Those ordering frozen goods, n=136

**Q: Over the next 5 years, do you expect the volume of frozen goods you order from the mainland to...?**

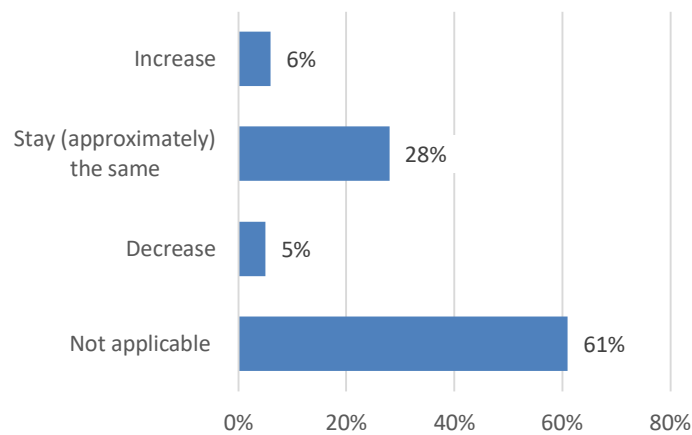
Figure 3-36 – Future Frequency of Frozen Goods



Base: Those ordering frozen goods, n=137

**Q: Over the next 5 years, do you expect the level of heating oil/kerosene you purchase from island suppliers to...?**

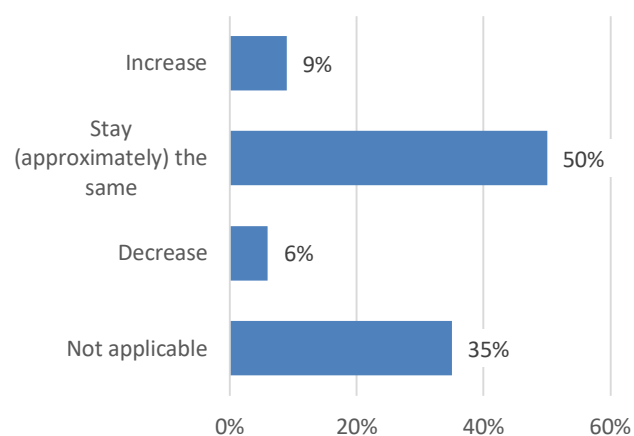
Figure 3-37 – Heating Oil/Kerosene Purchase



Base: All valid respondents, n=372

**Q: Over the next 5 years, do you expect your purchases of unleaded or diesel fuel from island suppliers to...?**

Figure 3-38 – Unleaded or Diesel Purchase



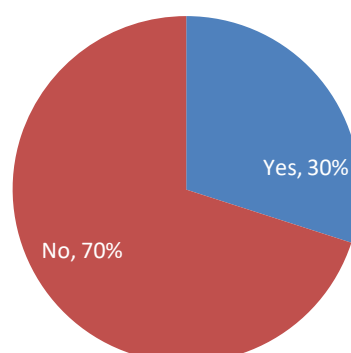
Base: All valid respondents, n=373

### 3.7 Lyonesse Lady

- 30% of respondents use the Lyonesse Lady for inter-island freight services.
- Over two thirds (68%) of those sending inter-island freight are happy with being able to ship/receive freight up to six times a week. A quarter (25%) would accept a reduction in services and receive goods once or twice a week if freight prices reflect this change.
- Asked what they particularly like about the current inter-island freight services, the 'service provided' is liked by 68%, 63% like the reliability of sailings, closely followed by 62% who like the regular scheduled service.
- Over the past 12 months, 84% have experienced at least some delays when receiving goods via inter-island freight (not including delays due to the Covid-19 pandemic). Of these, 35% say they have seen delays 'sometimes' and 3% say they experiencing it 'all the time'.
- The delays experienced are mainly down to weather (45%) or the item being delivered to the wrong address or island (42%). However, 30% of those who have seen delays found that it was down to restrictions to the on-deck carrying capacity on the Lyonesse Lady.
- Of those sending inter-island freight, 25% order frozen food to be transported between the islands, of which 4% have seen an increase of orders over the past five (5) years; 4% have seen a decrease. However, over the next five (5) years, 39% are expecting an increase in orders, whereas 4% think the volume of orders will decrease.
- 64% of those sending inter-island freight also use the service to receive large goods and vehicles. Of those, 45% think the service provided by the Lyonesse Lady is good although there are sometimes restrictions. 30% find the Lyonesse Lady to provide a good service without any restrictions. However, 19% have experienced some level of frustration; 13% have been frustrated by the level of service capacity and having to wait, and for 6% it was waiting for the tide in order to receive deliveries.

#### Q: Do you use the Lyonesse Lady for inter-island freight services?

Figure 3-39 – Inter-Island Freight Service



Base: All valid respondents, n=373

**Q: Which of the following statements best describes your preference in relations to inter-island freight best?**

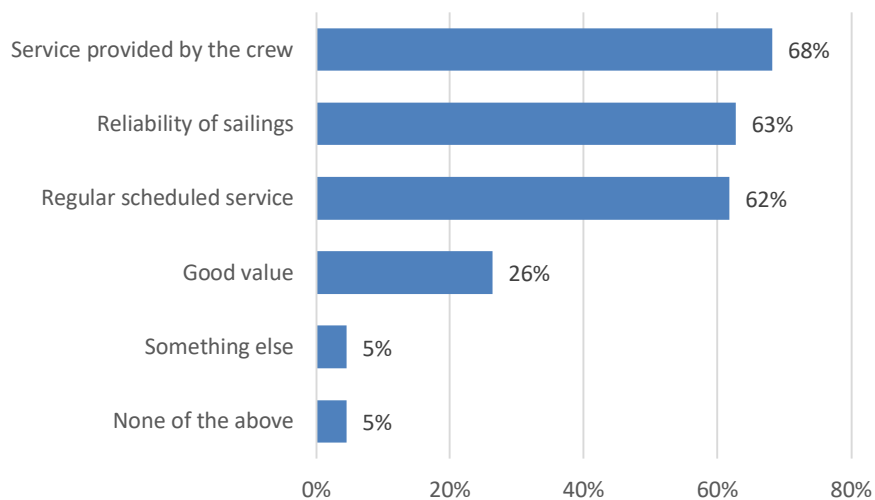
Figure 3-40 – Inter-Island Freight Preferences



Base: Those who use the Lyonesse Lady, n=113

**Q: What do you like about the current inter-island freight services?**

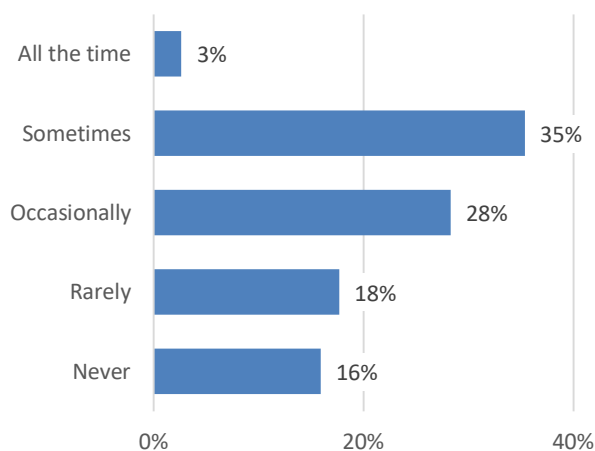
Figure 3-41 – Inter-Island Freight Positives



Base: Those who use the Lyonesse Lady, n=110

**Q: Over the past 12 months, have you experienced delays in receiving goods when using inter-island freight, with the exception of those delayed due to the Covid-19 pandemic?**

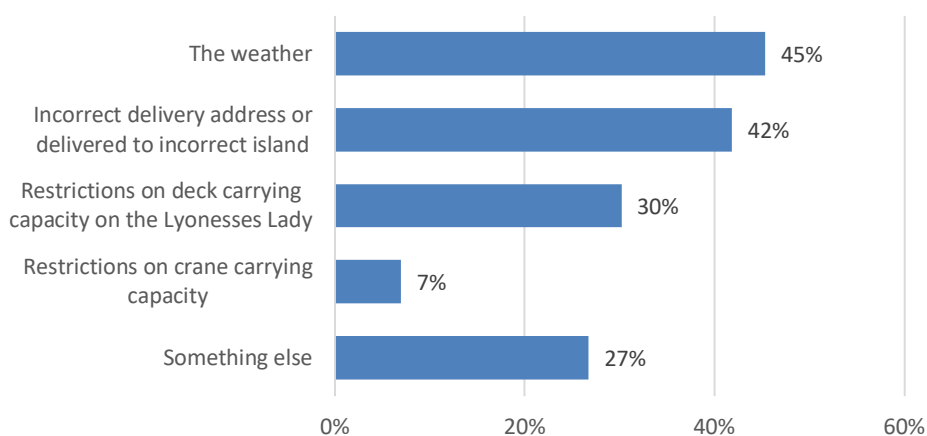
Figure 3-42 – Experience with Inter-Island Delays



Base: Those who use the Lyonesse Lady, n=113

**Q: Have these delays been down to...?**

Figure 3-43 – Reason for Inter-Island Delays

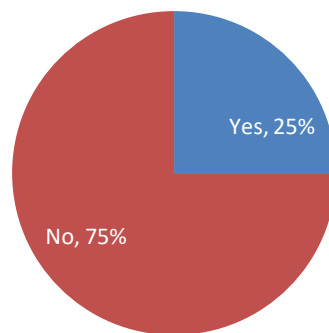


Base: Those experiencing delays with the Lyonesse Lady, n=86



**Q: Do you order frozen goods to be transported between the islands?**

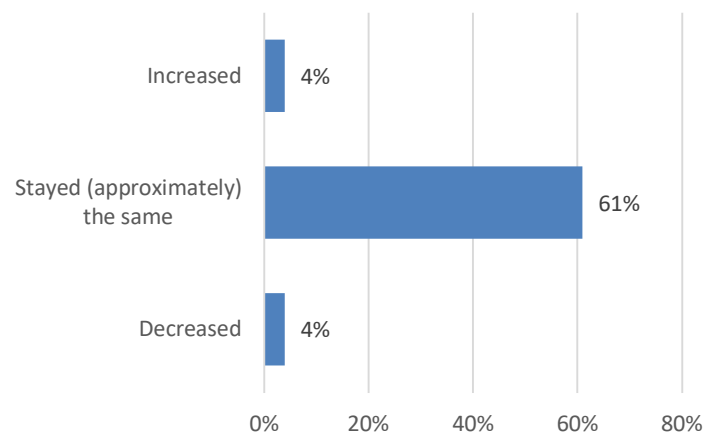
Figure 3-44 – Inter-Islands Frozen Goods



Base: Those who use the Lyonesse Lady, n=112

**Q: Over the past 5 years, have your orders of inter-island frozen goods transported...?**

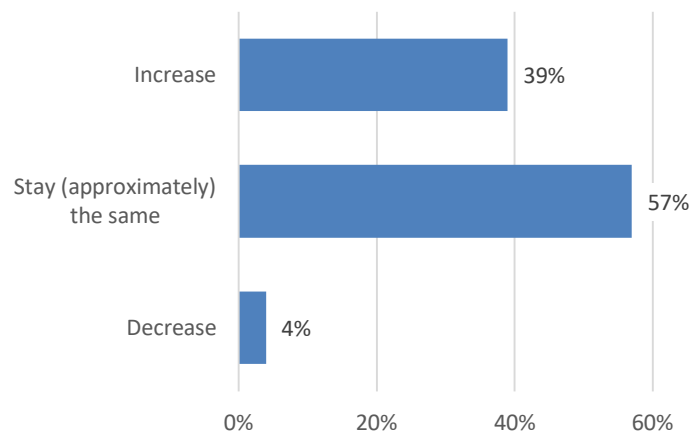
Figure 3-45 – Past Inter-Island Frozen Goods Levels



Base: Those ordering frozen goods between islands, n=28

**Q: Over the next 5 years, do you expect your ordering of inter-island frozen goods transported to...?**

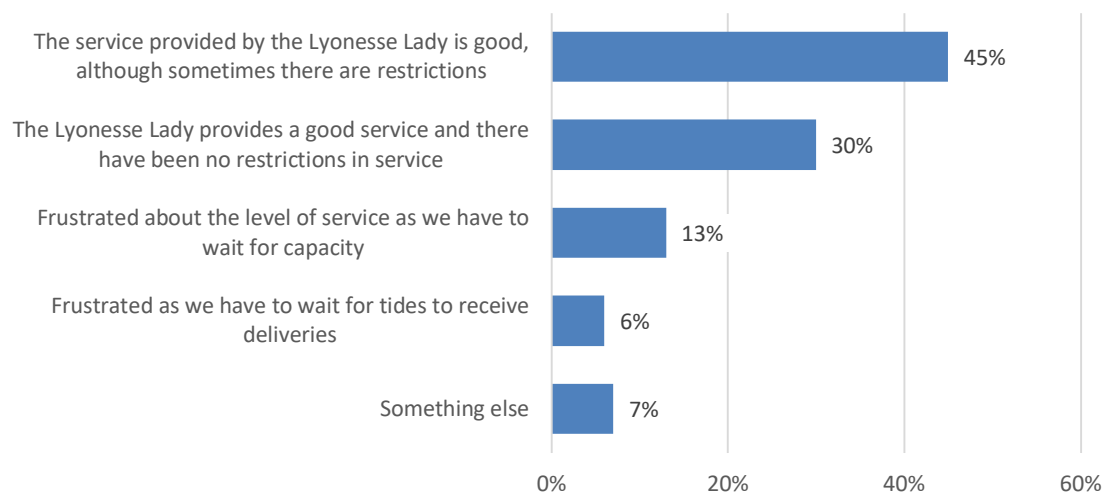
Figure 3-46 – Future Inter-Island Frozen Goods Levels



Base: Those ordering frozen goods between islands, n=28

**Q: What has been your experience in receiving vehicles and other large goods via inter-island in the past 12 months?**

Figure 3-47 – Experience of Inter-Island Large Goods



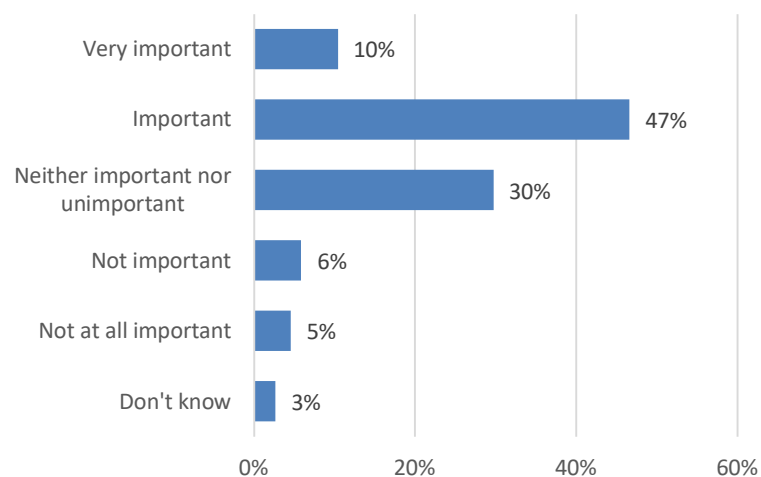
Base: Those who use the Lyonesse Lady, n=108

### 3.8 Future Travel

- Over half (57%) of all respondents said that environmental considerations are important or very important when travelling and/or sending freight.
- 41% say they would prefer a joint ship for travel and freight. Nearly half of all valid respondents (48%) say they 'don't mind either way'
- Asked to select the most important from cost, duration or comfort; journey cost and journey duration were each cited by 40%, with 20% saying comfort.
- The importance of journey cost (compared to duration and comfort) increases with frequency of travel. Whereas 40% of those who travelled up to twice in 2019 saying it is the most important, the figure increased to 50% for those who have travelled 10 or more times in the same period. The importance of journey duration is relatively consistent across the journeys made and importance of comfort decreases.

**Q: When travelling and/or sending freight, how important are environmental considerations for you?**

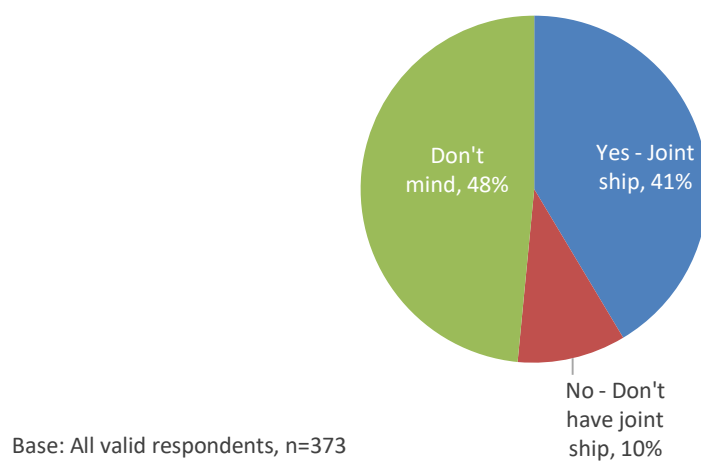
Figure 3-48 – Environmental Considerations



Base: All valid respondents, n=373

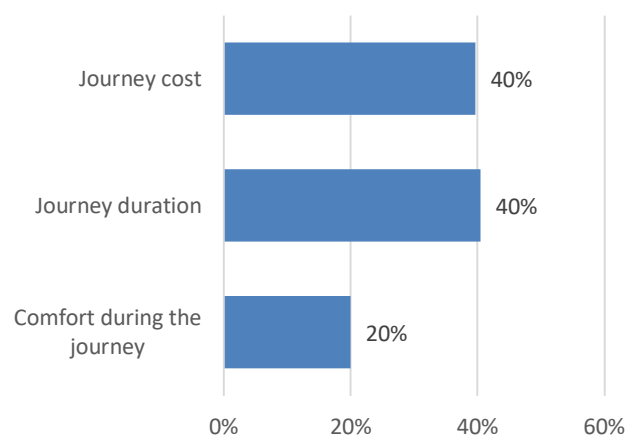
**Q: Would you prefer a joint purpose ship for passengers and freight?**

Figure 3-49 – Joint Ship for Passengers and Freight



**Q: When travelling, which of the following considerations is most important to you?**

Figure 3-50 – Travelling Considerations



Base: All valid respondents, n=373

Table 3-7 – Travelling Considerations by Journeys Made

	Total	None	1 to 2 Journeys	3 to 5 Journeys	6 to 9 Journeys	10 or more Journeys
Base	371	63	90	110	64	44
Journey cost	40%	21%	40%	44%	44%	50%
Journey duration	40%	52%	39%	39%	36%	36%
Journey comfort	20%	27%	21%	17%	20%	14%

## 4 Appendix 1 - Survey Email

### **Re: Help us shape the future of shipping services to the Isles of Scilly**

Dear ...

For 100 years we have provided lifeline shipping services between Penzance and the islands for passengers and freight.

Over the years there have been three Scillonian passenger ships. The current vessel, Scillonian III, was purpose-built for the company in 1977, and had a major refit in 2013.

In 1989 the company bought the Gry Maritha freight ship and she continues to supply the islands to this day.

As the Company has now entered its centenary year, we are turning our attention to replacing these vessels. We want to hear your views about what sort of marine service you think we should provide in the coming years, and what you would like any new vessels to do. As you know, the sea journey to Scilly is unique, it requires vessels that can operate in a variety of sea conditions and within the constraints of Penzance Harbour on the mainland and St Mary's Harbour on the islands. For example, in order to run a scheduled service, vessels must be able to sit on the bottom during low tide. The approach to Scilly and Penzance is not very deep, so ships need to have a shallow draft to have access into both harbours. This can mean a rougher ride in poor weather out at sea.

We also must consider what might happen in the future because any new vessels are likely to service for 20 years. Climate change means that we could see stronger winds with bigger waves, and we are likely to see tighter emission controls in that timeframe. We also need to look at costs, it's important that the sea link to Scilly is affordable for you, our islanders, and our visitors but also that it is profitable so that we can continue to invest in asset replacement longer into the future. All these things will need to be kept in mind when considering the design of new ships.

We are committed to finding the best design solution for any new vessels and that is why we are now starting a marine asset replacement consultation process, starting with the enclosed survey. This is the first step in a long consultation process and your responses will help inform and shape a face to face island wide consultation process once the COVID-19 lockdown rules have been relaxed and removed.

Given that there are choices that will have to be made, given the unique nature of the route and the need to balance lots of different factors, your feedback in regards to what sort of marine service you would like to see and what are your key priorities are essential in developing and finding the correct solution.

To have your say, please use the following link: <https://su.vc/dprhewah>. This should take you no longer than 5-10 minutes to complete. Your participation is anonymous and the aggregated data will be analysed by independent market research agency PFA Research in Penryn.

If you prefer a paper copy of the survey, please contact PFA Research via [participate@pfa-research.com](mailto:participate@pfa-research.com).

Further information on our consultation events will be provided when we can travel again.

Yours sincerely



Stuart Reid  
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Isles of Scilly Steamship Group