



# Travel between the Isles of Scilly and the mainland research

July 2023

# Foreword

**T**ransport Focus is pleased to have been asked by the Council of the Isles of Scilly to help it explore the views of residents and businesses on the transport options which take people between Scilly and the mainland.

This important research provides insight for those providing this transport, and particularly for those designing and delivering the ferry

services which play an essential role to Scilly. The findings also provide a useful benchmark for further research into how these transport services continue to meet the needs of residents and of businesses.

**Anthony Smith**  
Chief executive

## Background and objectives of this research

The Isles of Scilly are an archipelago situated 24 nautical miles from the coast of Cornwall. Alongside 'Skybus' airplane services, and services provided by the Penzance Helicopter, connection between the mainland and Scilly is provided by the RMV Scillonian III passenger ferry and by the Gry Maritha freight ship. A further boat also operates, delivering items and people between each of the islands. Together, these vessels are essential to Scilly, bringing both passengers and freight to and from the mainland. These boats are operated by the Isles of Scilly Steamship Company who have been providing similar services for more than 100 years.

In October 2021 the Council of the Isles of Scilly was awarded £48.8 million towards the cost of improving the ferry services. Rather than making unilateral decisions about how best to spend this money, the council has sought to make efforts that

ensure that any plans made in the future will reflect the views and needs of those living and working on Scilly.

Early in 2023 the Council asked Transport Focus to assist it in undertaking this research. The research asked those living and running business on the Islands about which aspects of the current ferry services are working well, and which aspects might be improved. Transport Focus worked closely with the Council of the Isles of Scilly and with the independent research agency BMG who designed the questionnaire and collected responses. The survey which was sent to people on Scilly focussed particularly on the quality, affordability, and accessibility of the ferry services. It also included questions about the other crossing modes available to residents and businesses to achieve a more 'rounded' view of the services available.

*"All year-round sailings, more double sailings which would allow day trips from Isles of Scilly, more outdoor covered seating and/or more stabilisation to aid a smoother crossing in rough weather."*

Suggestions for improvement – resident

*"Have a central drop and load service. The current set up in Penzance quay is abysmal and far too expensive."*

Suggestions for improvement – business

# Overview of research findings

- While the majority of residents use the ferry to make crossings to the mainland at least once a year, **a significant demand to make crossings more frequently exists.**
- The **scheduling and cost of the ferry services are critical factors determining the extent to which ferry services are used**, so getting these things right is the key to unlocking suppressed demand.
- Use of the ferry service may increase significantly if the period within which it runs during the year is extended. Similarly, **there is a demand for the scheduling of services which allows people to attend appointments on the mainland and return within the same day**, rather than incurring the cost of overnight stays.
- Residents express that they would like the cost to use the ferry to be reduced, and **findings suggest that there is limited room for any new crossing to increase cost substantially.**
- The cost of bringing freight on to the Islands affects both businesses and residents. **Residents want to support local businesses by buying from them but purchasing decisions are heavily influenced by the freight costs involved**, while businesses are reluctant to pass freight costs to end consumers. **More than 85 per cent of businesses rate their operation and profitability as ‘extremely dependant’ on the transportation of goods and of customers.**
- **People are generally positive about the experience of using the ferry services, but few are extremely positive.** Those who are managing business on the islands are generally less positive than others. There is room to improve perceptions among residents and business owners by concentrating on the scheduling of services and the experience at the mainland ports.

## Findings in detail

### Residents and the ferry services

75 per cent of those living on Scilly travel to the mainland using the Scillonian ferry at least once a year. This compares with 90 per cent who use Skybus services to travel to the mainland at least once a year, and 20 per cent who do so using the Penzance helicopter services. Crossings tend to be made for personal, rather than for business or work related, reasons. 83 per cent say that they make crossings to visit friends or family, 65 per cent to attend medical appointments, and 61 per cent to go on holiday.

Almost 80 per cent of residents say that they would like to travel to the mainland more often than they currently do, with almost half wishing to take five or more additional journeys per year if they could. Among residents, the cost is viewed as the key factor that would encourage them to make more crossings. However, logistical factors, such as the convenience of the schedule, are also important and to some degree relate to cost since a service running at more convenient times precludes the need for expensive overnight stays on the mainland.

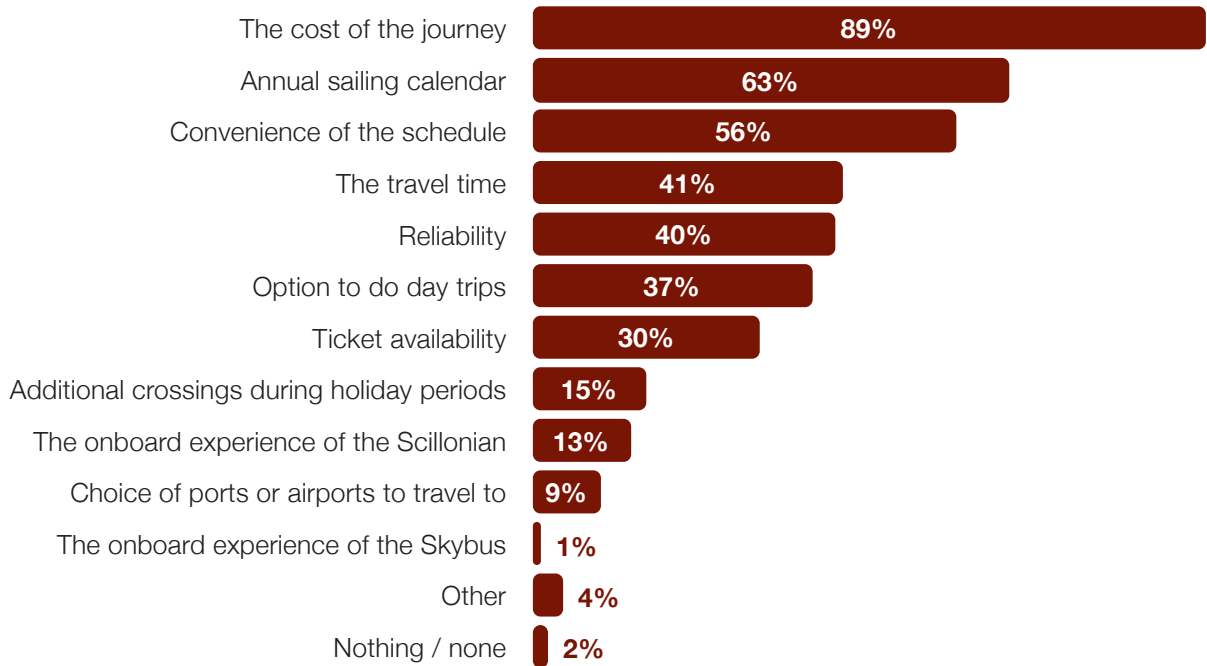
*“More convenient sailing times from the islands. Once a week sailings in the winter. More careful and secure luggage handling in Penzance.”*

Suggestions for improvement – resident

*“The cost is getting ridiculous; we have to pass these on so there is only so much we can do. Items arrive damaged but I no longer claim as its slow and I have to pay again rather than getting it credited to my account.”*

Suggestions for improvement – business

Which of these would encourage you to make more journeys to the mainland?



*“There needs to be more flexible prices...The Scillonian takes a long time, and the travel times are often late afternoon, meaning you usually have to stay overnight ... resulting in further costs...There needs to be cheaper alternatives to the Scillonian for people who need faster and easier travel.”*

Scilly resident

### The impact on business of the ferry services

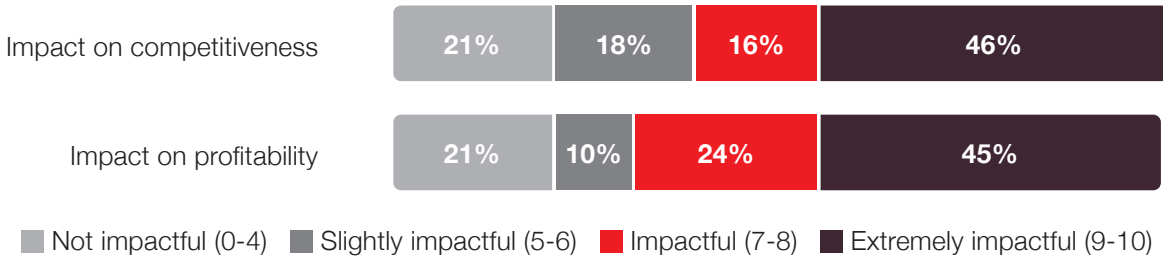
60 per cent of those managing business on Scilly say that they are bringing goods or products onto the islands on at least a weekly basis, while they say that they are sending items to the mainland slightly less frequently. The types of goods or products bought onto Scilly tend to be bulk raw materials and parts required to provide a service, while those being sent from Scilly tend to be stock items for resale. Using the Scillonian and the Gry Maritha boats tend to be the main ways in which businesses on Scilly transport goods to the mainland. However regular postal or courier services also play an important role in transporting resale items.

Businesses on Scilly appear to be extremely dependent, both operationally and financially,

on transporting goods between Scilly and the mainland, and receiving customers from the mainland is also vital. 85 per cent or more in each case rate their business’ operation and profitability as ‘extremely dependant’ on the transportation of goods and of customers.

Accordingly, given that the ability to send and receive items from and to the mainland is so essential to those running businesses on Scilly, they are very aware of the impact that freight costs can have on the competitiveness and profitability of their business. Almost a half say that freight costs are ‘extremely impactful’ on the competitiveness of their business, while a similar proportion say the same about the impact on profitability.

**To what extent do freight costs impact on the competitiveness/profitability of your business?**

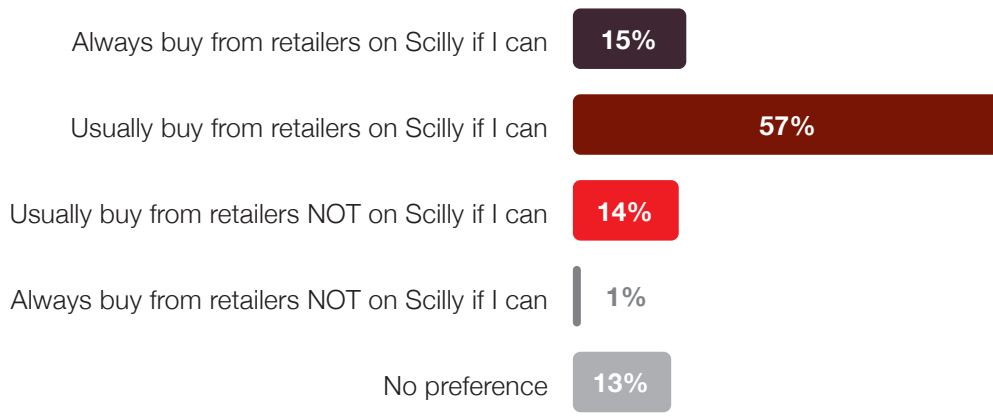


Overall, businesses do not feel that they are able to pass on the freight costs that they are charged for moving goods to and from the mainland on to consumers. Just 31 per cent say that they are able to pass on 50 per cent or more of the cost of moving items, while 30 per cent say that they cannot pass any of these costs on.

For their part, most residents say that they

try to buy from local businesses if they can, but they are aware of cheaper options being available on the mainland. Just as those running businesses, residents are aware of the impact of freight costs on the purchasing decisions that they make; 62 per cent say that freight costs are 'extremely important' in influencing where they buy products from.

**Do you buy products from retailers on the Isles of Scilly, rather than elsewhere (for example online retailers)?**



*"I believe it is vital to support local suppliers in order to maintain local services."*

Scilly resident

*"I do buy local if possible. But most things we need are not available on the islands or are too expensive."*

Scilly resident

*"I believe we will lose our local shops if we do not use them."*

Scilly resident

## Attitudes to fares and freight costs

To look at residents' attitude towards the cost of using the Scillonian, the research adopted an approach which indirectly measures a person's willingness to pay for a service rather than asking people directly to identify a single price point. The approach used asks several questions about the cost of a service to generate price curves, and then uses this information to suggest the range of costs which most people agree is appropriate for the service.

This method suggests that, on average, residents feel that the acceptable range for the cost of using the Scillonian is £26 - £35. With residents currently paying £50 for a return journey, this is close to the

amount that they currently pay with the discounted rate which is available to them. Considered in the light of other findings from the research, where the cost of making a crossing is considered by residents to be the biggest barrier to making the number of trips to the mainland that they would ideally like to, attitudes to fares are clearly complex. Residents are making broad considerations when deciding about their travel to the mainland, so, for example, while naturally a cheaper fare would be welcome, it is not the cost of the journey itself which accounts for the largest proportion of the cost of a trip given the current timetable.

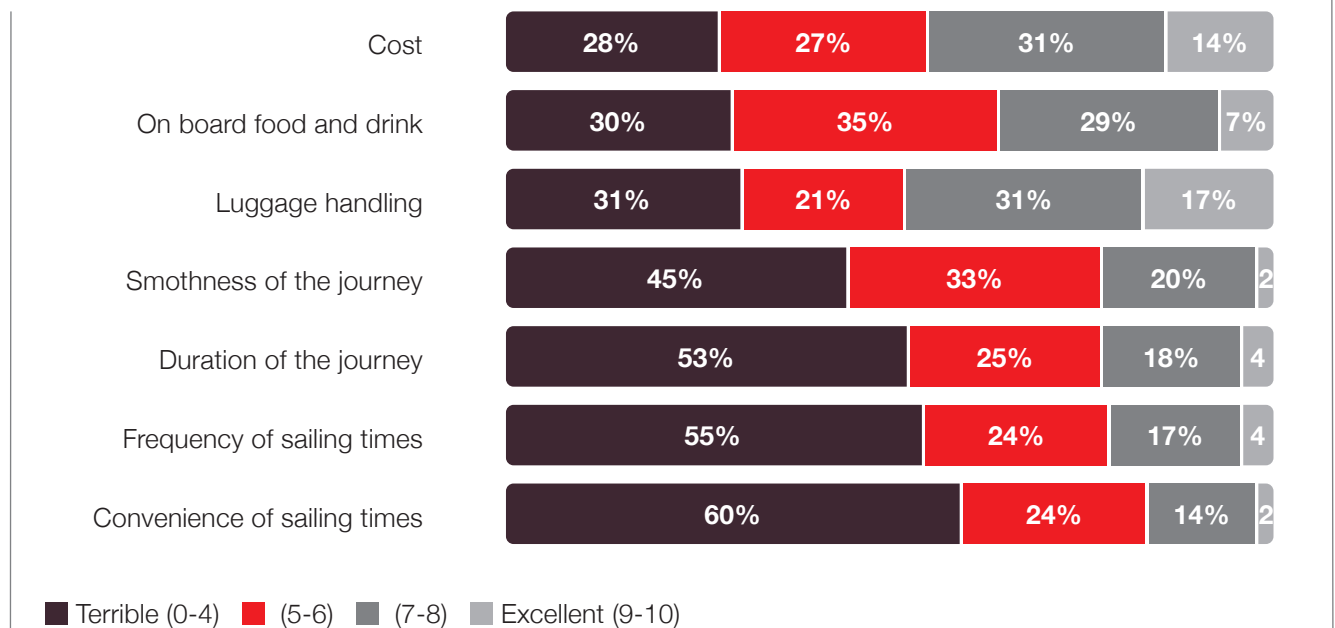
## The experience of using the Scillonian and Gry Maritha freight ship

In general residents are fairly positive about the experience of using the Scillonian. When asked to rate the general experience of using the Scillonian on a scale where zero is 'terrible' and 10 is 'excellent' almost half rate the service at seven or above. Those running businesses, on the other hand, are less positive about the operation of freight services with 31 per cent rating this at seven or above.

When residents are asked to rate various elements

of the Scillonian ferry service, they tend to rate lowest elements associated with the scheduling of the sailings, rather than the cost of using the ferry. While the data here suggests that cost is not driving dissatisfaction with the Scillonian, the research showed that cost is a factor at play within the issue of the convenience of sailing times, since an improved schedule of sailings would mean that people avoided costly overnight stays on the mainland.

### How would you rate the Scillonian on the following..?\*



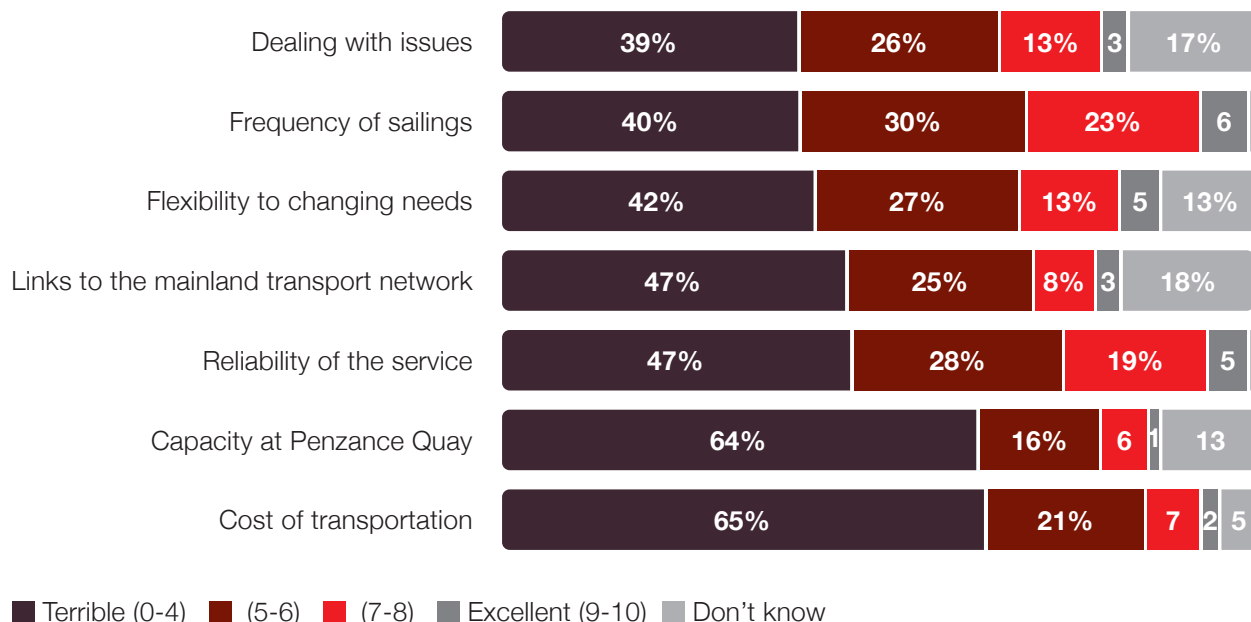
\* For simplicity this chart shows the seven items that were rated 'worst'. On board comfort, impact on the environment, luggage policy, reliability of the service, ticket availability and safety were rated more favourably than the items displayed.



When asked to rate the freight services those on Scilly managing businesses tend to rate poorly the cost of

the transportation of goods, and the capacity at Penzance Quay for deliveries.

### How would you rate freight service to and from the Isles of Scilly on the following..?\*



\* For simplicity this chart shows the seven items that were rated 'worst'. Availability of the freight services I need, quality of the service I receive, freight arriving undamaged, having suitable sailing times, duration of the journey, freight arriving without loss, impact on the environment, and safety were rated more favourably than the items displayed.

## How we did this research

In March 2023 each household on the Isles of Scilly was sent a letter by BMG Research inviting them to participate in the survey. All those living in each household on Scilly over the age of 16 could participate in the survey online, using an access code which was provided in the letter. If people were unable to access the online survey, they were able to contact BMG Research and complete the survey with an interviewer over the telephone.

All adults in each household were encouraged to participate in the survey, with each letter containing four access codes. Additional access codes were available from BMG research via the telephone helpline. Response to the survey was encouraged through communications on Scilly and BMG also telephoned residents and requested that they submit a response. Those owning a business

identified this on the survey questionnaire and then answered additional questions to provide views in this context. Overall, the survey was based on 46 questions (though not all the questions were answered by everybody), and the questionnaire took most people 23 and half minutes to complete.

The survey closed in April 2023 at which time 335 responses had been received from 264 households. This means that 19 per cent of the adult population of Scilly provided a response, or that responses were received from 20 per cent of the total number of households on Scilly. These response rates can be considered very positive for a push-to-web survey of this nature, and the findings from the weighted data will therefore be robust and accurately represent the view of the population.

## Contact Transport Focus

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