Isles of Scilly Ferry and Freight Research

Research Report

Report Contents

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Summary

Research Objectives & Method

Research Objectives

The Council of the Isles of Scilly, is carrying out a survey into experiences and perceptions of transport and freight experiences – and what is needed for the future – for residents and businesses on the Isles of Scilly. The survey supports the Council and the Department for Transport in relation to the Levelling Up Fund bid for replacement vessels and transport infrastructure.

The survey focused on the quality, affordability and accessibility of transport services – for residents and businesses. It covers all crossing modes – by air and sea – to ensure completeness.

Research Approach

Each household was sent a letter, inviting them to participate in the survey.

Residents could participate by accessing the survey online and using an access code from the letter. If unable to access it online they could contact BMG Research and complete the survey with an interviewer via the telephone.

All adult household members were encouraged to participate in the survey, with each invite letter containing 4 access codes. Additional codes were available from BMG research via the telephone helpline.

Those owning businesses (self-identified) were asked additional questions relating to the experience and impact on their business.

Response was encouraged through press releases and promotion by the Council of the Isles of Scilly. BMG Research encouraged response by calling residents and requesting participation.

Resident and business perspectives of price of the crossings were measured using the Van Westendorp/Price Sensitivity Meter method.

- 335 responses were received from 264 households:
  - A response rate of 19% of the adult population (1732) was achieved. This is a strong response rate for a push-to-web survey of this nature.
  - 20% of households participated in the survey.
  - Data has been weighted to reflect the adult population of the Isles by age and gender
  - 2 residents chose to complete the survey over the telephone with BMG interviewers.

The statistical margin of error of the survey is ±4.8% (at a 95% confidence level), which suggests that the data collected is robust and dependable. That is to say, that any figure reported at the overall level should be representative of the population of the Isles of Scilly within a 4.8% range of accuracy.

This report is structured around the key questions addressed

What are the current experiences, perceptions and future needs of residents and businesses on the Isles of Scilly of transport and freight options

What are residents' behaviours and attitudes towards crossings?	What are businesses' behaviours and attitudes towards crossings?	What are the perceptions of ferry experience?	What are the attitudes towards crossing fares?
How often do residents use crossing services at present?	How often do businesses use crossing services at present?	How do residents and businesses rate their experience – overall and in detail?	How much would residents desire to pay for a crossing?
How are crossing services used?	How are crossing services used?	How would businesses and residents improve the crossings?	How much would business pay for freight costs?
What factors affect the number of crossings taken?	How important are crossing services to business success?		
What level of additional demand exists?	How do businesses handle freight costs?		
How do transport and freight options affect resident purchasing and choice of retailer?			

Key insights

Crossing Behaviour

- The vast majority of residents use the crossings at least once a year – primarily the Skybus and Scillonian. This usage is linked to life-stage and the typical activities undertaken by different groups that may require them to visit the mainland.
- Significant demand for further crossings exists – especially among the younger groups of residents.
- Cost and schedule are the critical factors in determining the level of actual use that occurs so addressing these can unlock the demand.
- Use of the ferry service may increase significantly if the service period is extended to be available for longer periods of the year. The Skybus is currently used when the ferry service is unavailable in the Winter, but an extended ferry service would offer a cheaper alternative for passengers.

Freight

- Cost of freight affects both businesses and residents. Residents want to support local business by buying from them, but purchase decisions are heavily influenced by the freight costs involved.
- Businesses feel they have limited ability to pass on the freight costs to end consumers; this varies by sector and is likely to reflect the dynamics of the sector.
- Businesses are highly dependent on the crossings to both receive and send products – and the majority do so on a weekly basis.
- Ferry crossings are the most used freight route for businesses – but most are using courier and postal services also.

The Ferry Experience

- The ferry experience is broadly positive - but few are extremely positive.
- Businesses are less positive and a significant number are extremely negative about it
- There is room to improve the overall experience through focusing on the experience at the mainland ports – for residents and businesses.

Price Points

- Cost is important to both residents and businesses – but residents are more dissatisfied with the scheduling and logistics of a crossing than its cost per se. Businesses are also more dissatisfied with the logistics than cost – though their focus is on the Penzance quay experience and linkage to the transport network.
- Residents have expressed that they would like the price of crossings to be lower – reflecting the impact of cost on levels of demand. This suggests limited room for any new crossing to increase cost substantially.
- Residents with businesses desire lower prices and show little enthusiasm for increased prices.

Residents’ behaviours and attitudes towards crossings

There is a high incidence of using existing Scillonian services - though the actual number of crossings made is low

The Scillonian

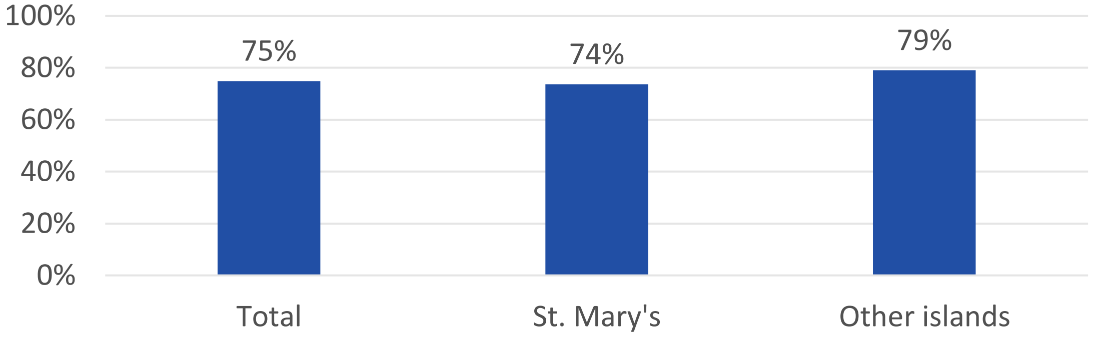
75%

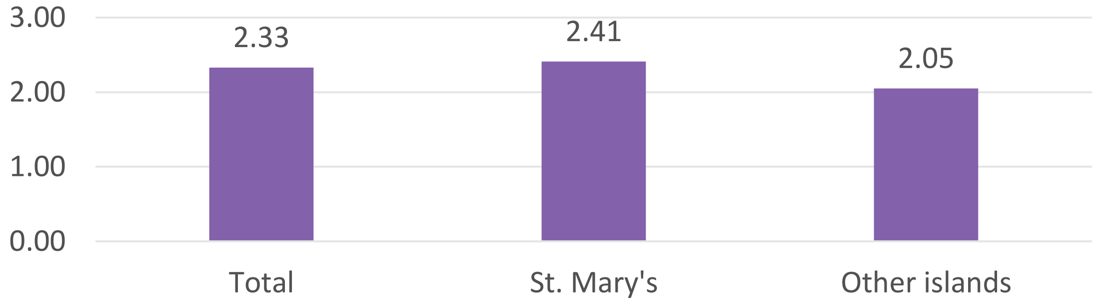
Travel to the mainland via The Scillonian at least once a year

Mean* no. crossings: **2.33**

Median* no. crossings: **2**

Note: "crossings" in this context refers to journeys to the mainland from the Isles of Scilly, not a return crossing.





A lower proportion of residents on St. Mary's use The Scillonian to travel to the mainland each year, but those who do make more trips on average than residents of the remaining islands.

* Averages exclude those who do not use the methods of transport annually.

C1. Typically, how many times a year do you travel to the mainland via: The Scillonian (258)/Skybus (303)/Penzance Helicopters (64)

The Skybus is the most commonly used mode of transport for traveling to the mainland and has a relatively high frequency compared to the other options.

Skybus

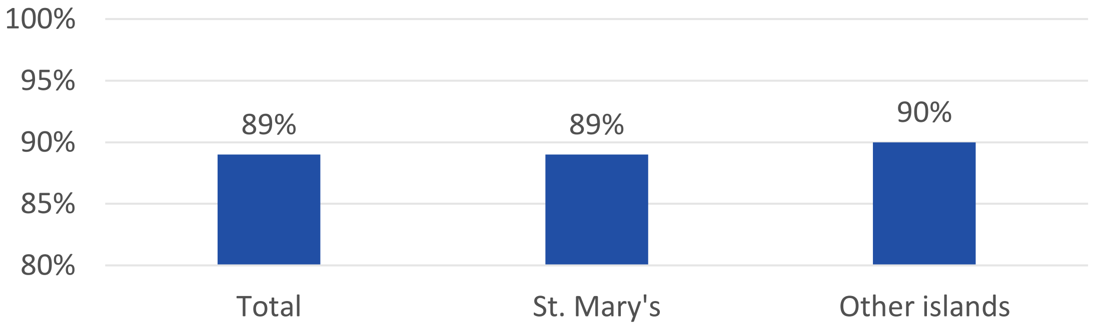
90%

Travel to the mainland via Skybus at least once a year

Mean* no. crossings: **2.73**

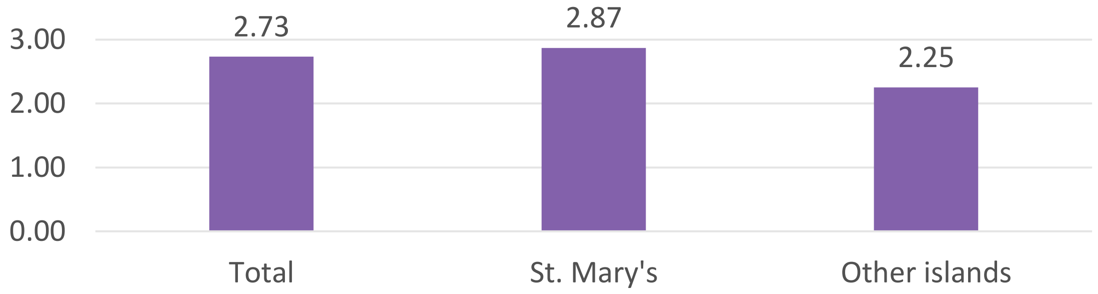
Median* no. crossings: **2**

Note: "crossings" in this context refers to journeys to the mainland from the Isles of Scilly, not a return crossing.



98% of residents aged 75+ travel via Skybus at least once a year.

Currently crossings made for medical appointments are most likely to be made via Skybus.



* Averages exclude those who do not use the methods of transport annually.
C1. Typically, how many times a year do you travel to the mainland via: The Scillonian (258)/Skybus (303)/Penzance Helicopters (64)

Penzance helicopter is the much less frequently used method of transport for traveling to the mainland – both in incidence and frequency used.

Penzance Helicopter

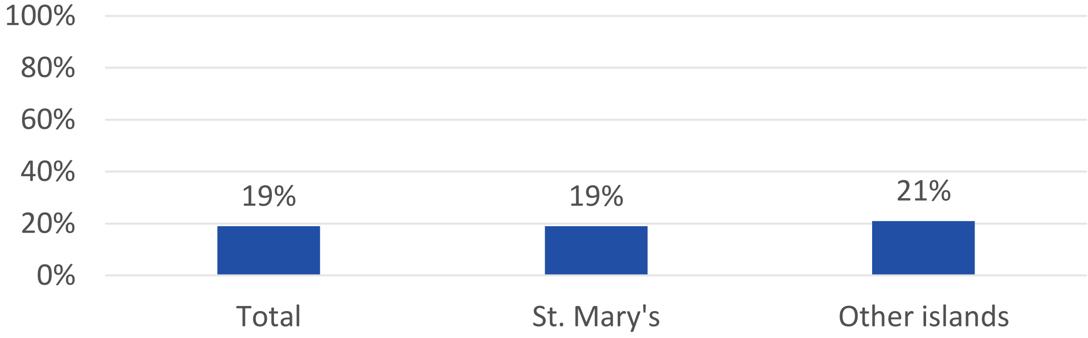
19%

Travel to the mainland via Helicopter at least once a year

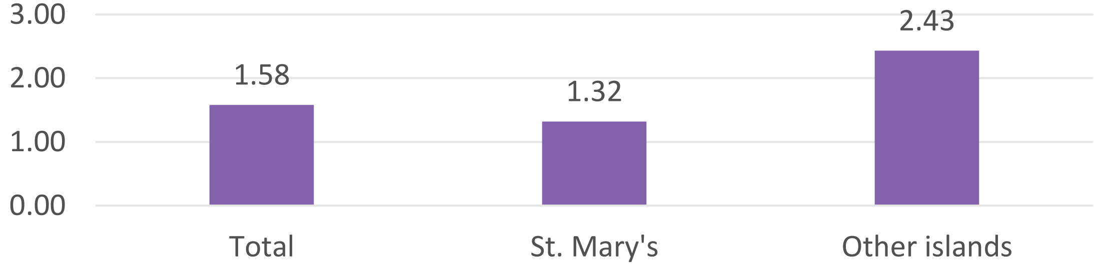
Mean* no. crossings: **1.58**

Median* no. crossings: **1**

Note: “crossings” in this context refers to journeys to the mainland from the Isles of Scilly, not a return crossing.



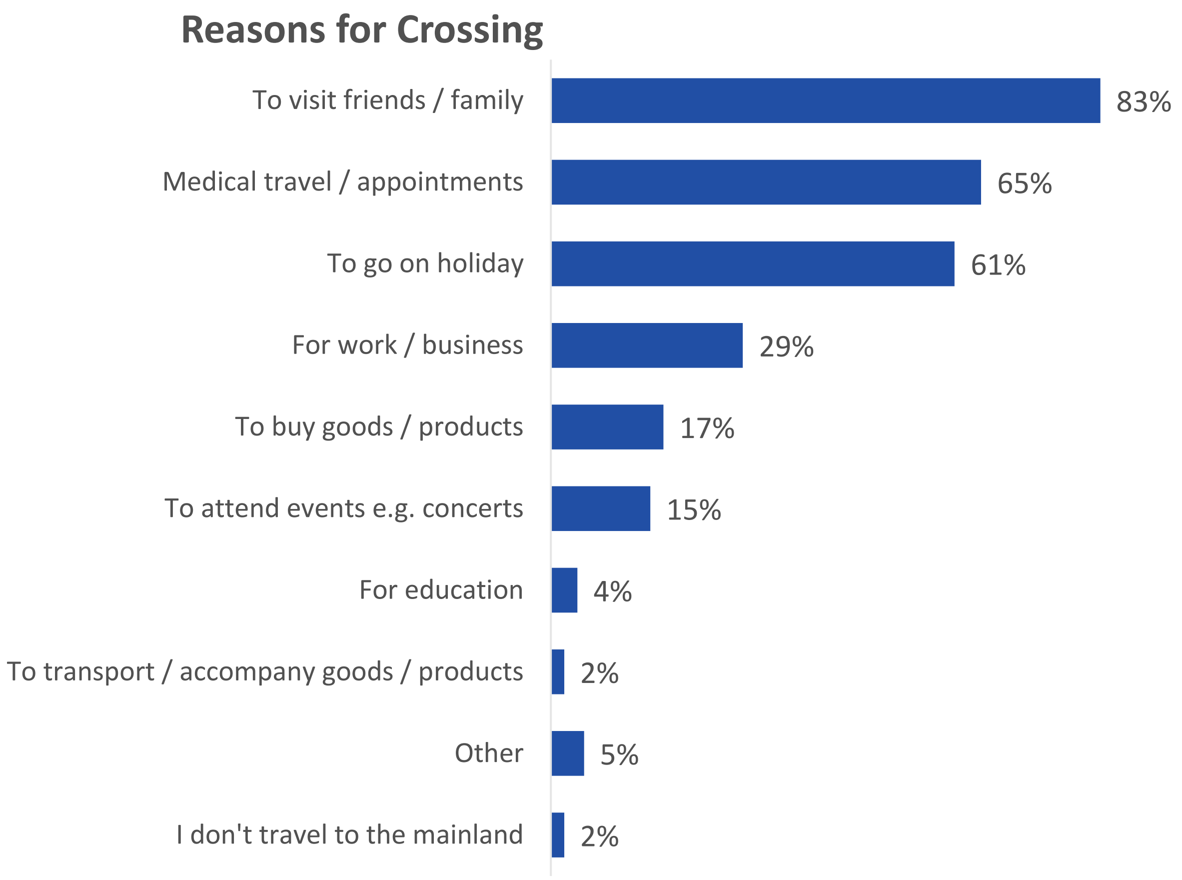
Access to helicopter as a method of transport is recent, with services commencing from March 2020. Traveling by helicopter for medical-related journeys in the future is being explored as an option.



Residents from islands other than St. Mary’s that use Penzance Helicopters, are significantly more likely to use them more often.

* Averages exclude those who do not use the methods of transport annually.
C1. Typically, how many times a year do you travel to the mainland via: The Scillonian (258)/Skybus (303)/Penzance Helicopters (64)

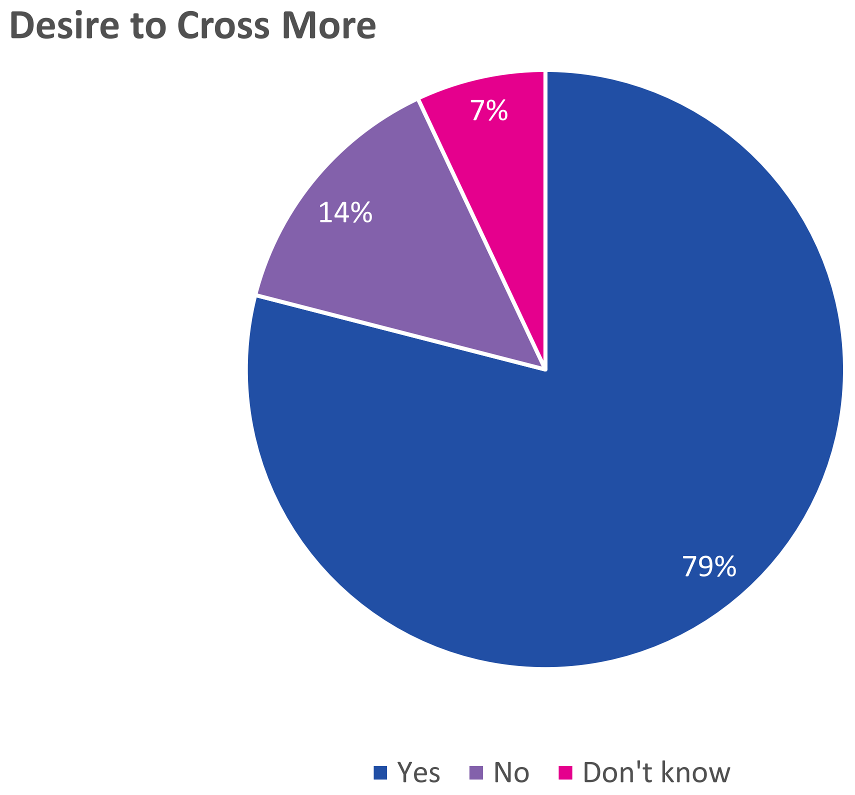
Reasons for crossing are most commonly personal, rather than business-related. Differences by age are likely to reflect life-stage priorities.

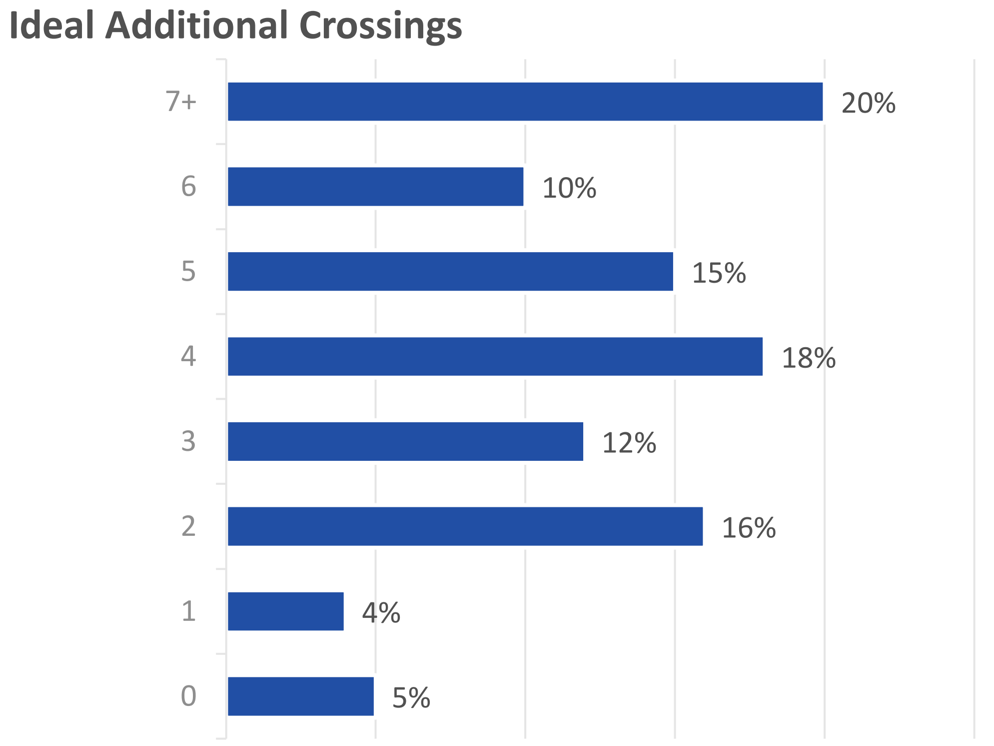


- Visiting friends/family is a more common reason for crossing for residents aged 16-44 (92%).
- Those aged 75+ are more likely to travel to the mainland for medical reasons or appointments (89%).
- Women are significantly less likely to travel to the mainland to go on holiday (49%) than men (72%).

C2. Why do you travel to the mainland? (335)

The majority of residents would like to travel to the mainland more often, with almost half wishing to take 5 or more additional journeys per year if they could.



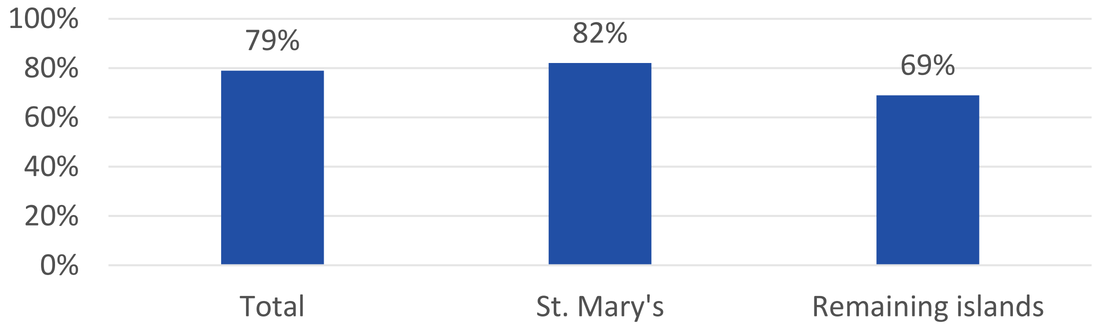


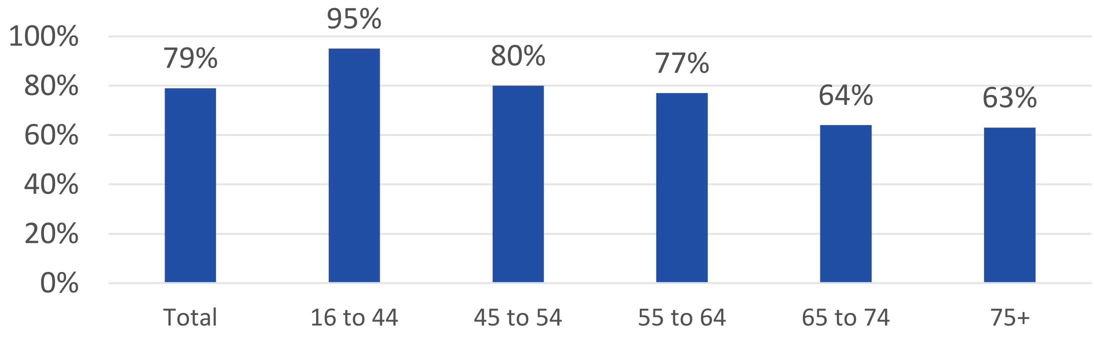
Note: "crossings" in this context refers to journeys to the mainland from the Isles of Scilly, not a return crossing.

C5. Would you like to travel to the mainland more than you currently do? (335)
C6. In an ideal world, how many more journeys to the mainland would you make per year? (335)

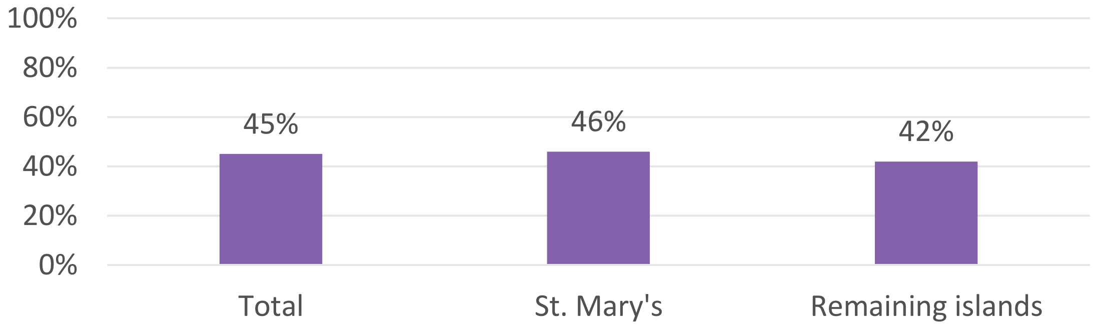
Younger residents are more likely to want to travel to the mainland more frequently. Women are less likely to want to make 5+ additional crossings annually.

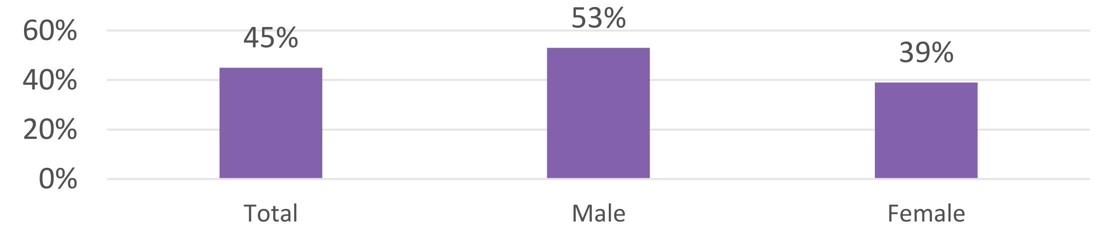
Desire to Cross More - % yes





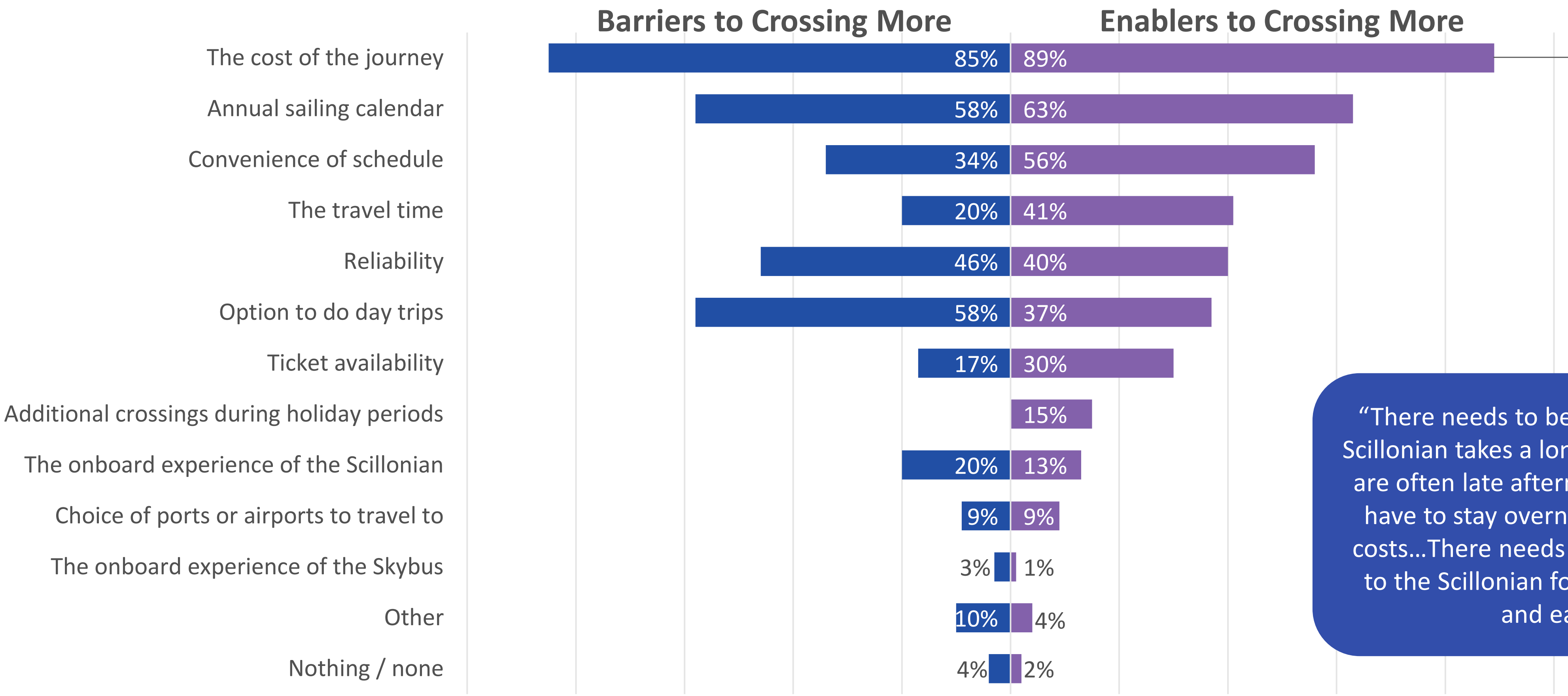
Ideal Additional Crossings - % 5+ crossings





C5. Would you like to travel to the mainland more than you currently do? (335)
C6. In an ideal world, how many more journeys to the mainland would you make per year? (335)

Cost is viewed as the biggest barrier to crossing more often. Practicality/logistical factors – such as schedule – are also key, so matching this to needs could also unlock higher levels of demand.



The cost of the journey is a more significant barrier for those aged 16-44 (94%).

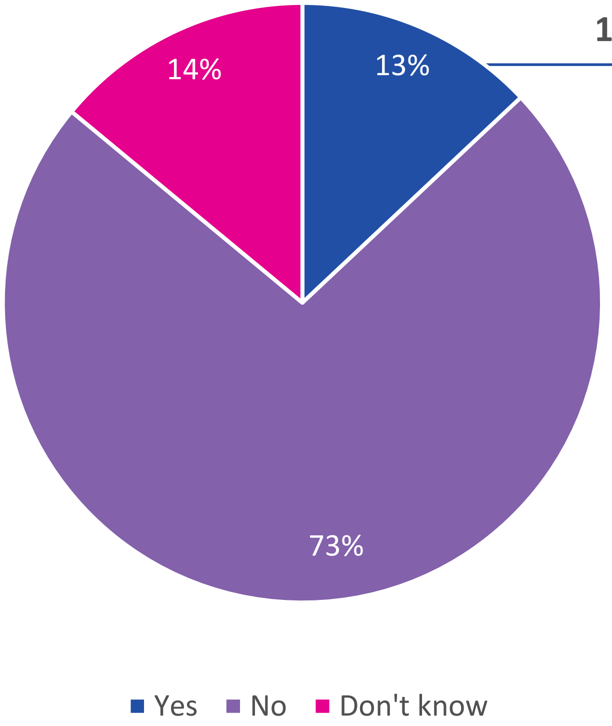
Cost is likely to reflect additional factors such as overnight accommodation due to the fact that day trips are not an option for those visiting the mainland.

"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."*

C3. What aspects limit/reduce the number of times you travel to the mainland? (335)
C4. Which of these would encourage you to make more journeys to the mainland? (335)
*G1. Thinking about all the issues covered in this survey about the ferry services, are there any more comments that you would like to make? (204)

There appears to be little concern over the impact of being able to cross more frequently. Those who did voice concerns felt higher tourist traffic could be detrimental.

Concerns over Ability to Cross More



13% expressed concerns

Would the islands' infrastructure be able to cope with, potentially, more visitors, with possibly more vehicles being brought over?... Does more boats mean more food deliveries as well as people?

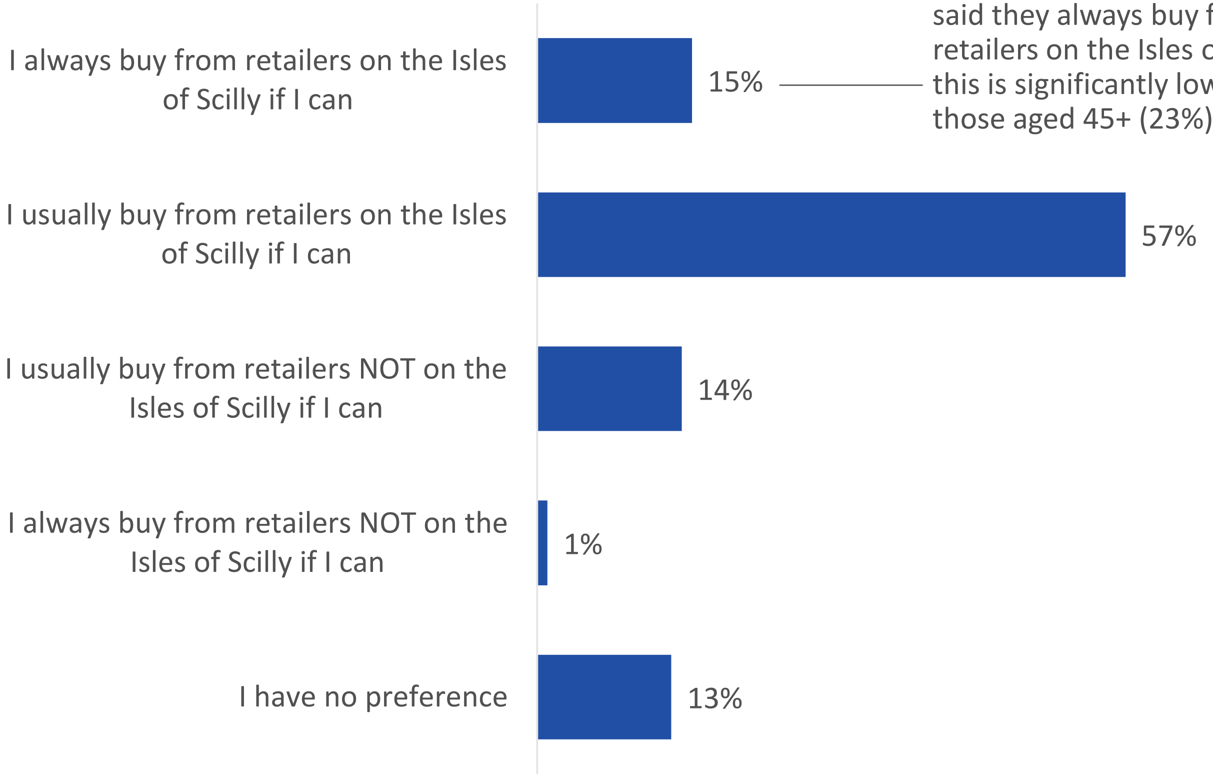
Volume of traffic works both ways and there is insufficient accommodation for tourists.

It might attract more people who only come for what Scilly gives them without regard for the local residents and community e.g. hen/stag weekends.

C7. If travel between the islands and the mainland became easier, would you have any concerns? (335)
C8. What concerns would you have? (45)

Most residents try to buy from local retailers in order to support them. However, they are aware of potentially cheaper and more diverse options available from the mainland.

Purchasing Preferences



Only 3% of residents aged 16-44 said they always buy from retailers on the Isles of Scilly: this is significantly lower than those aged 45+ (23%).

Reasons for Preferring Isles of Scilly Retailers

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

There's no waiting for deliveries from the mainland.

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

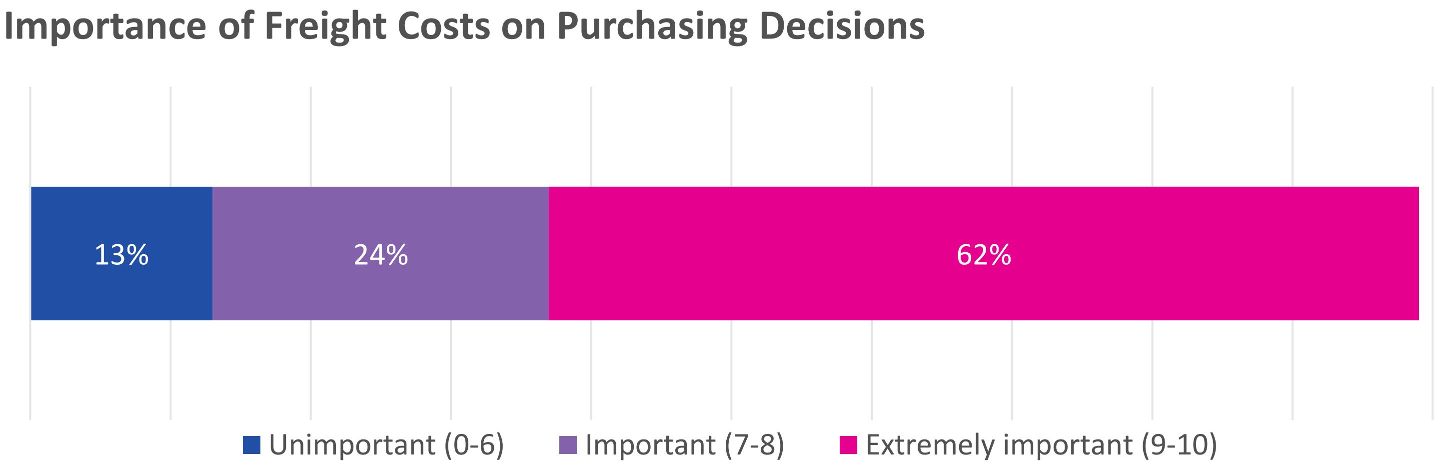
Reasons for Preferring Non-Isles of Scilly Retailers

Usually because the price is much cheaper, more choice etc.

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

B4. Do you buy products from retailers on the Isles of Scilly rather than elsewhere e.g. online retailers? (335)
B5a. Why do you choose to buy from retailers located on the Isles of Scilly not elsewhere? (289)
B5b. Why do you choose to buy from retailers NOT located on the Isles of Scilly? (87)

Residents feel shipping/freight costs are extremely important in determining where they buy products from – current costs act as a barrier to bring more from the mainland.



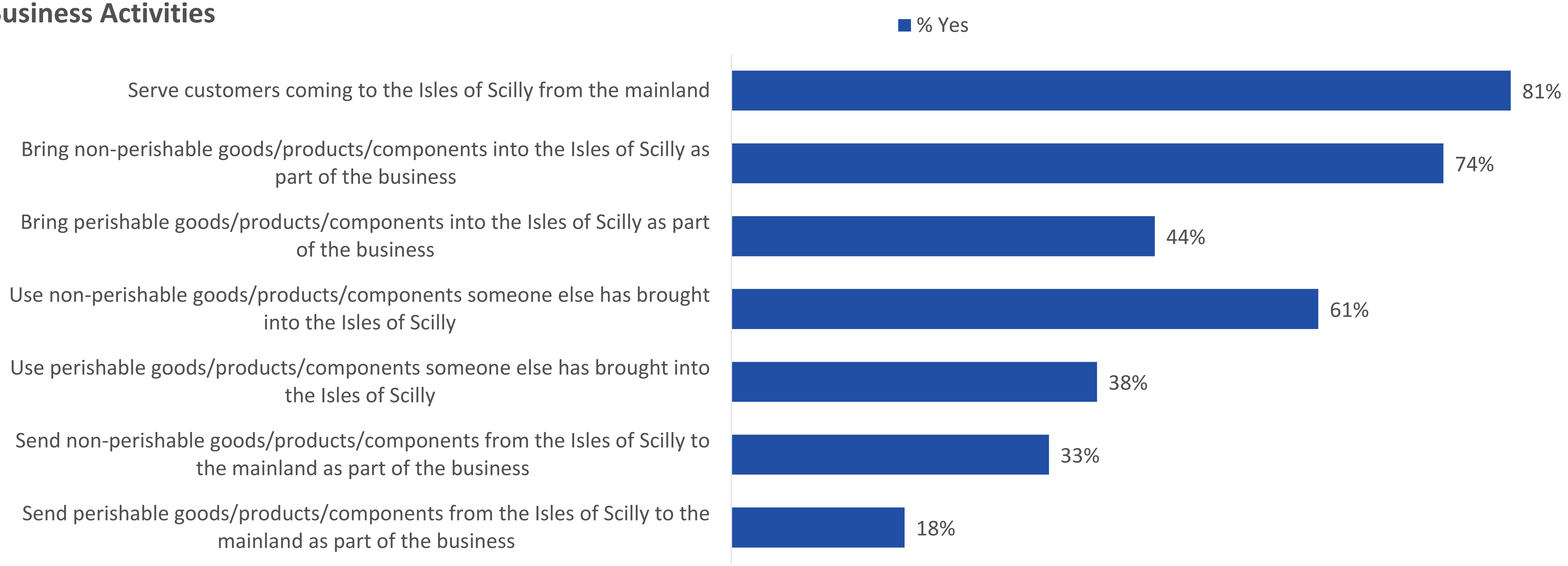
- Those who usually buy from retailers not on the Isles of Scilly are significantly more likely to consider freight costs to be extremely important when making purchasing decisions (79%).

B6. How important are shipping/freight costs for deciding where you buy products from? (335)

Businesses behaviours and attitudes towards crossings

Residents who were self-employed or had their own business mostly serve customers visiting the Isles of Scilly from the mainland or deal with non-perishable goods.

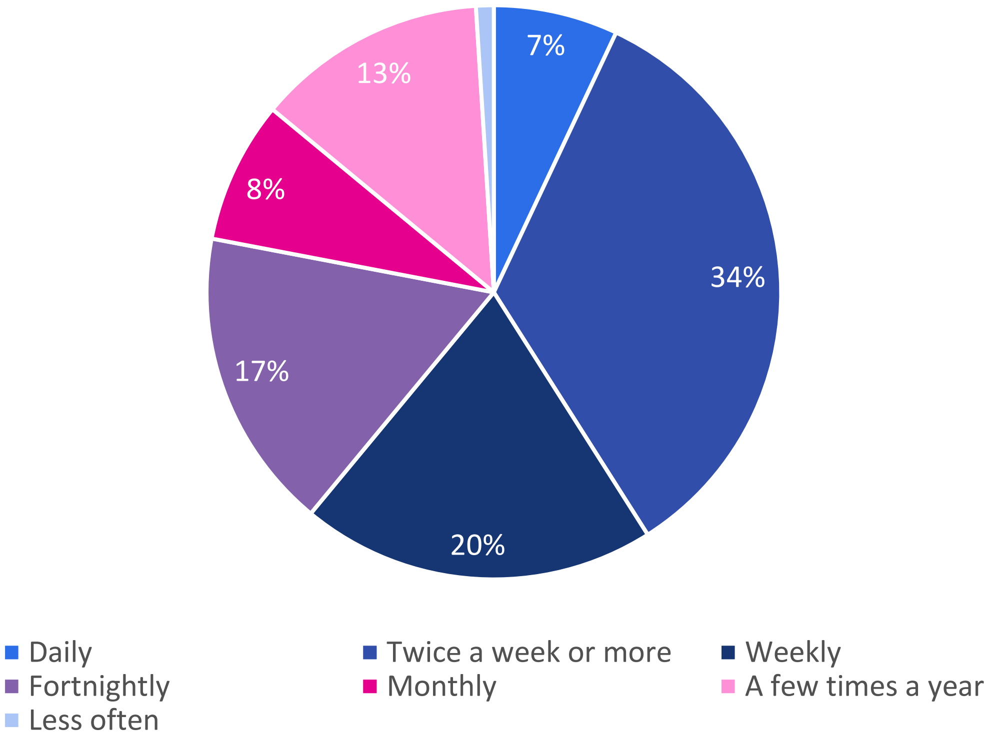
Business Activities



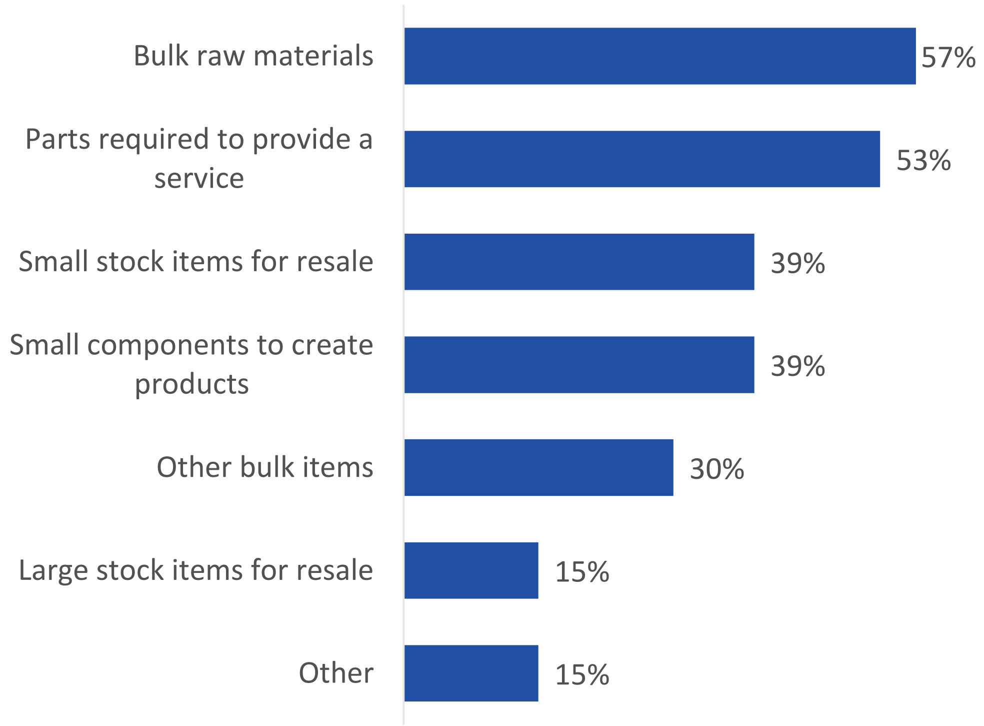
F2. Does your business… (136)

Residents' businesses bring a variety of different types of goods/products to the Isles of Scilly, largely to enable them to provide a service rather than as the 'end product'. Around 60% are bringing goods/products in on at least a weekly basis.

Frequency of Bringing Goods/Products to Isles of Scilly



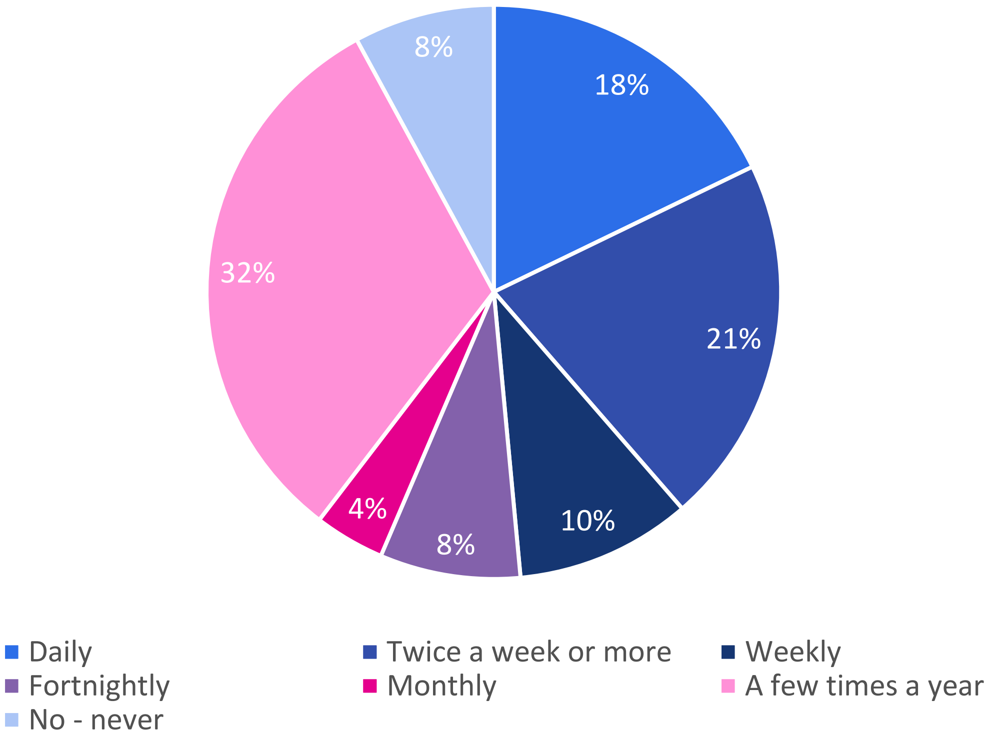
Types of Goods/Products Brought



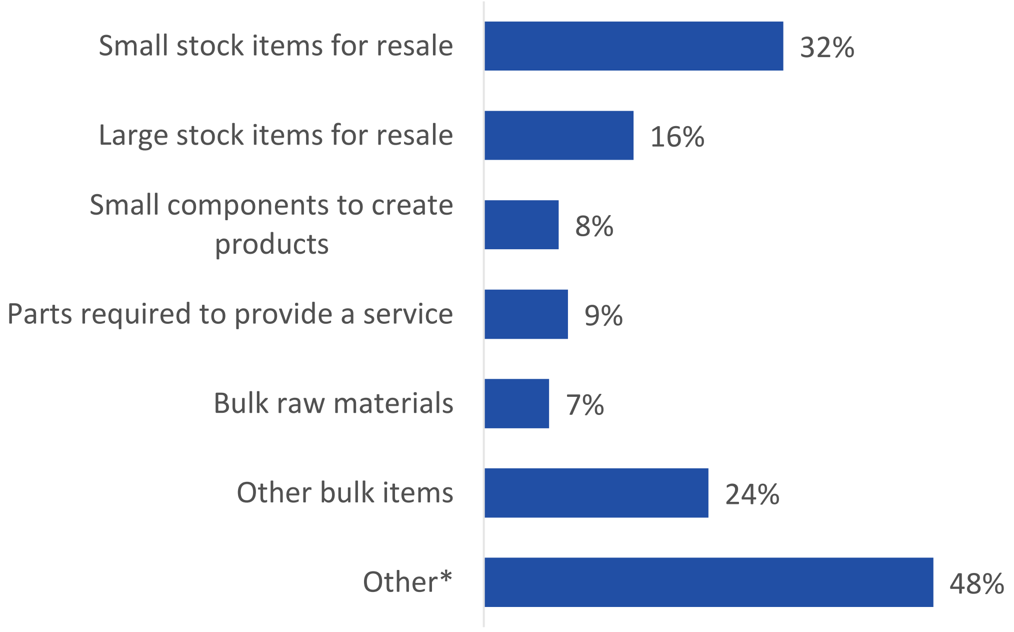
F3. How often does your business bring goods/products/components into the Isles of Scilly? (103)
F3x1. What types of goods/products/components does your business bring into the Isles of Scilly? (103)

Residents' businesses send goods/products to the mainland less frequently than they bring them in. Items sent are more focused on resale – so may have different shipping/freight requirements to those brought in.

Frequency of Sending Goods/Products to Mainland



Types of Goods/Products Sent



*Other types of goods/products commonly mentioned include:

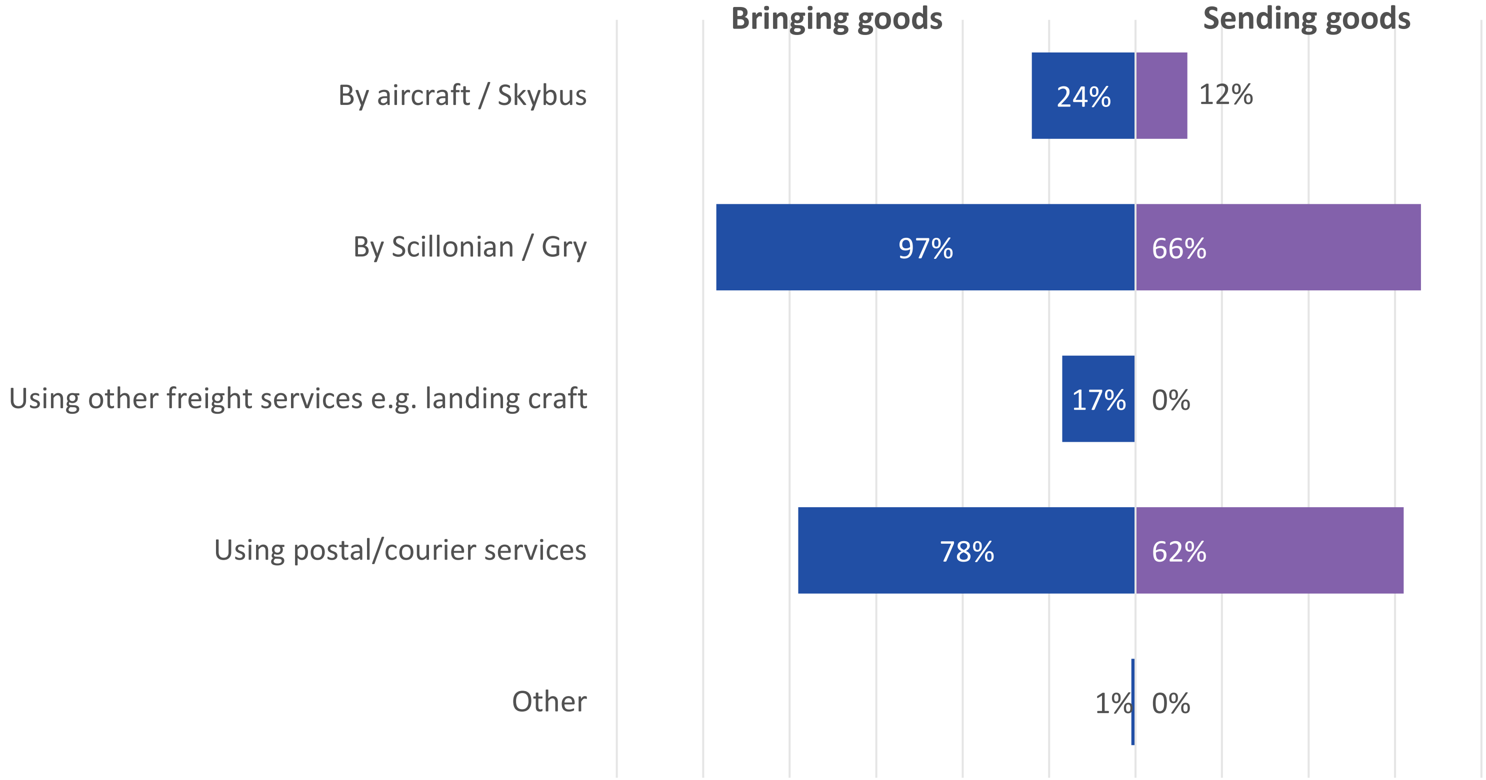
- Flowers
- Fresh fish
- Finished goods and arts/crafts

F5. How often does your business send goods/products/components from the Isles of Scilly to the mainland? (52)

F6. What types of goods/products/components does your business send from the Isles of Scilly to the mainland? (52)

'The Scillonian Passenger Ship / The Gry Maritha Freight Ship' and 'postal/courier services' are the main means of transporting goods to and from the Isles of Scilly. Postal/courier services leaving the Isles are particularly focused on resale items.

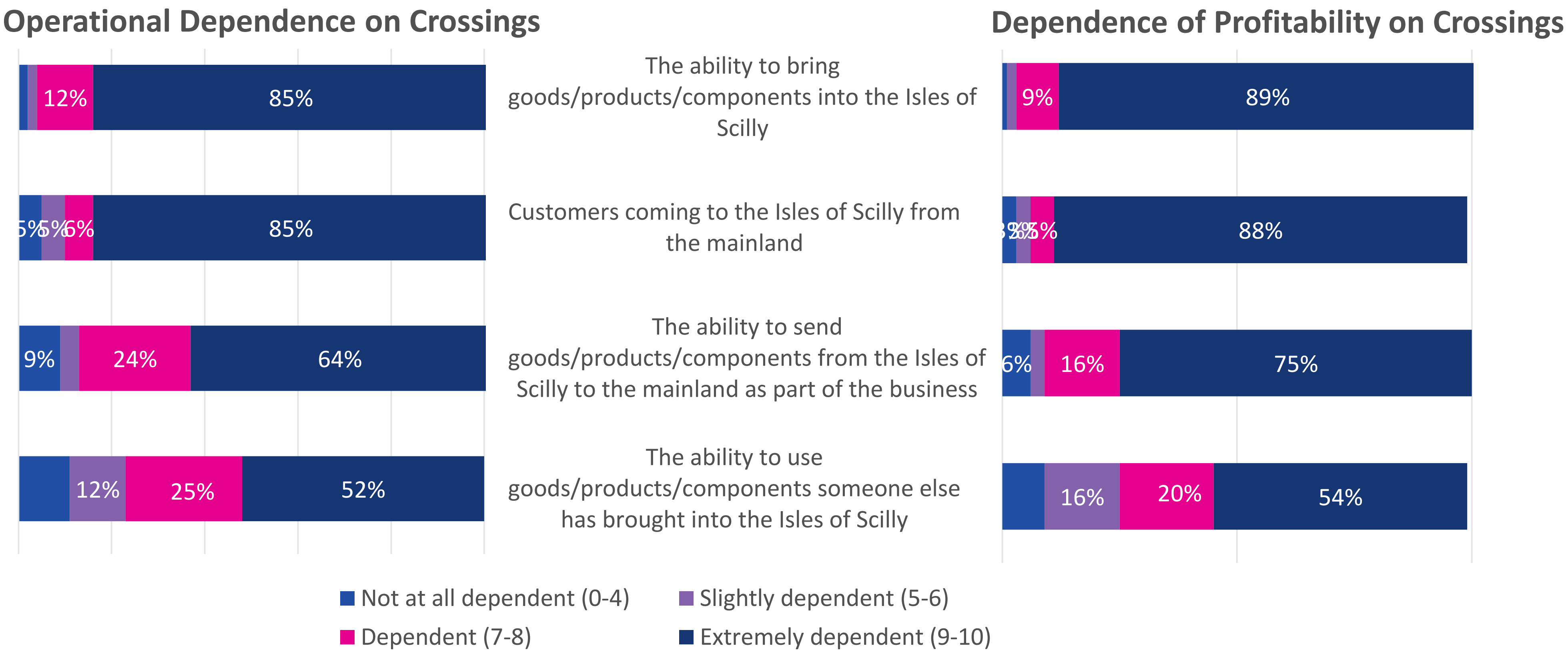
Crossings Used for Transporting Goods/Products



- Women are significantly less likely to send goods via The Scillonian / Gry (29%) than men (89%).
- Businesses in the 'Agriculture, forestry and fishing' sector are significantly more likely to send goods via The Scillonian / Gry (97%).
- Residents who make an income selling products they have made/grown themselves are significantly more likely to rely on postal/courier services to send goods (83%).

F4. How do you bring goods/products/components into the Isles of Scilly? (103)
F7. How do you send goods/products/components from the Isles of Scilly to the mainland? (52)

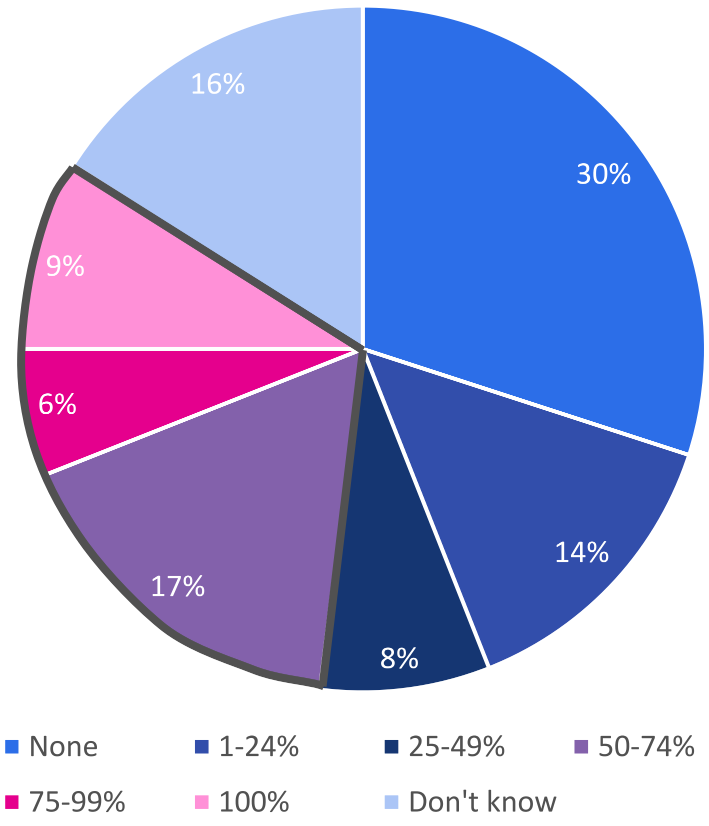
Residents' businesses are extremely dependent, operationally and financially, on transporting goods between Scilly and the mainland. Receiving customers from the mainland is also vital.



F8a. How dependent is the day-to-day operation of your business on:
F8b. How dependent is the profitability of your business on:

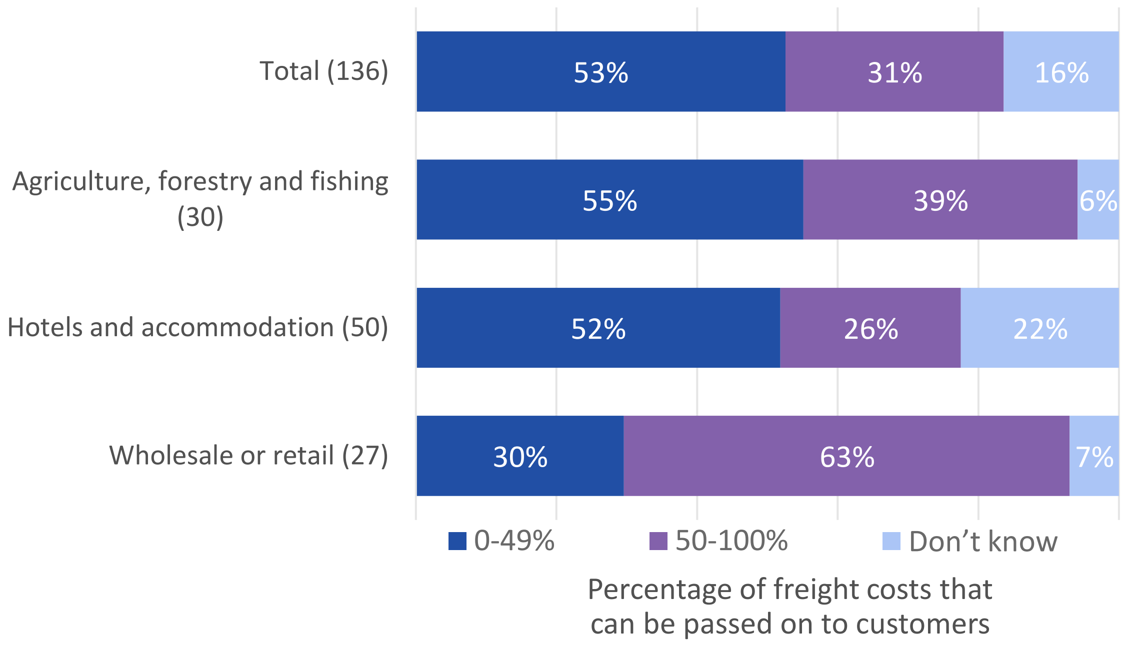
- The ability to bring goods/products/components into the Isles of Scilly (103)
- The ability to use goods/products/components someone else has brought into the Isles of Scilly (83)
- The ability to send goods/products/components from the Isles of Scilly to the mainland as part of the business (52)
- Customers coming to the Isles of Scilly from the mainland (110)

A limited proportion of businesses feel they can pass costs of freight onto customers. However, this varies by sector.



A little over 30% of businesses say that they can pass a half or more of the freight costs onto their customers.

Percentage of freight costs that can be passed on to customers:



63% of businesses in the 'Wholesale or retail' sector say that they can pass on a half or more of the freight costs onto their customers, compared with just 31% of businesses overall.

* Individual sectors with less than 25 responses have not been included as the results cannot be considered representative of the sector as a whole.
F12. What proportion of freight costs are you able to pass onto your customers? (136)

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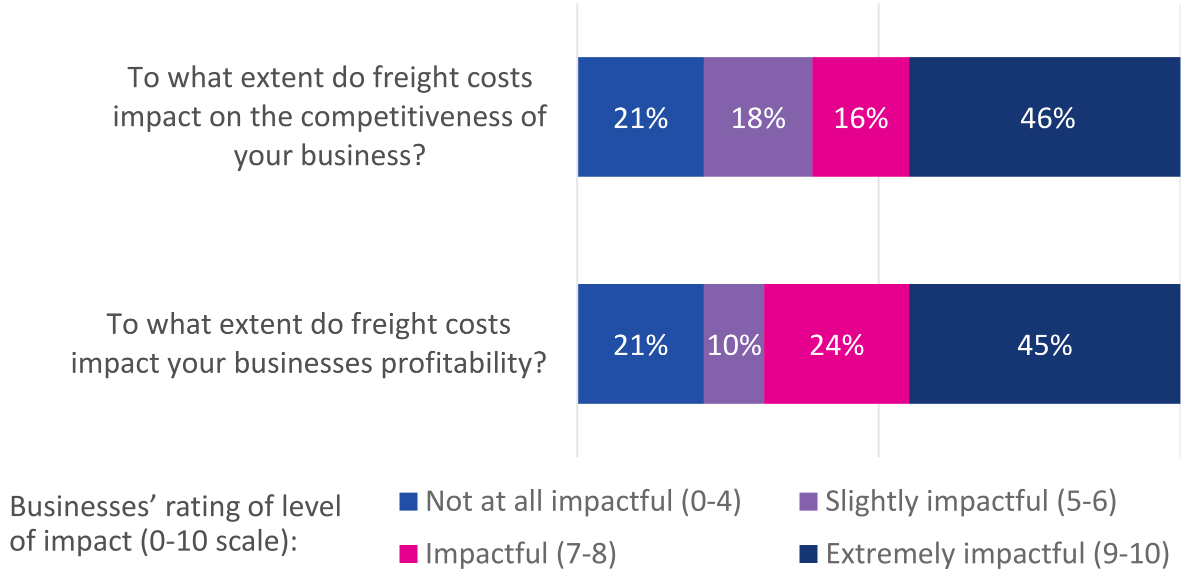
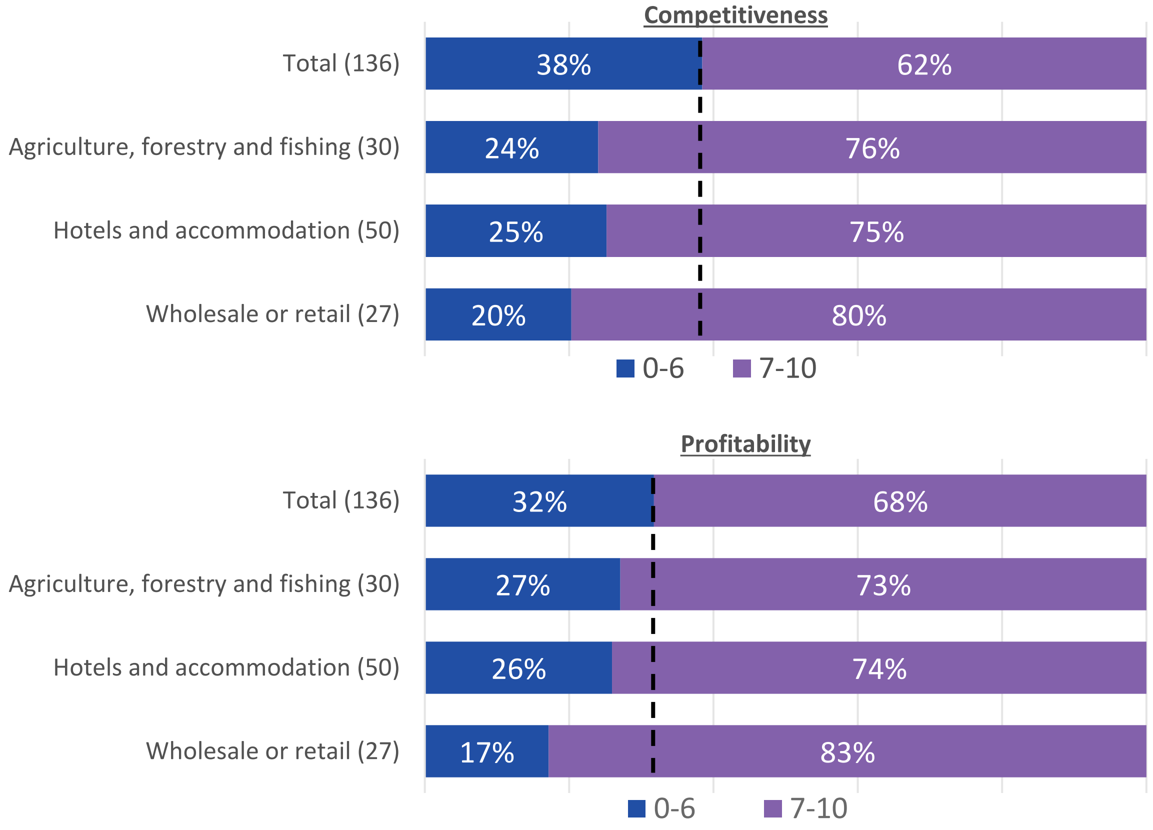
Freight costs are perceived to be impactful on business competitiveness and profitability. Differences by sector exist - likely reflecting consumer choice and buying power.

Impact of Freight Costs on Business



Impact of Freight Costs on Business by Sector*



* Individual sectors with less than 25 responses have not been included as the results cannot be considered representative of the sector as a whole.
F14. On a scale of 0-10 where '0' is not at all impactful and '10 is extremely impactful, to what extent do freight costs impact on the competitiveness of your business? (136)
F15. On a scale of 0-10 where '0' is not at all impactful and '10 is extremely impactful to what extent do freight costs impact your businesses profitability? (136)

Perceptions of Ferry Experience

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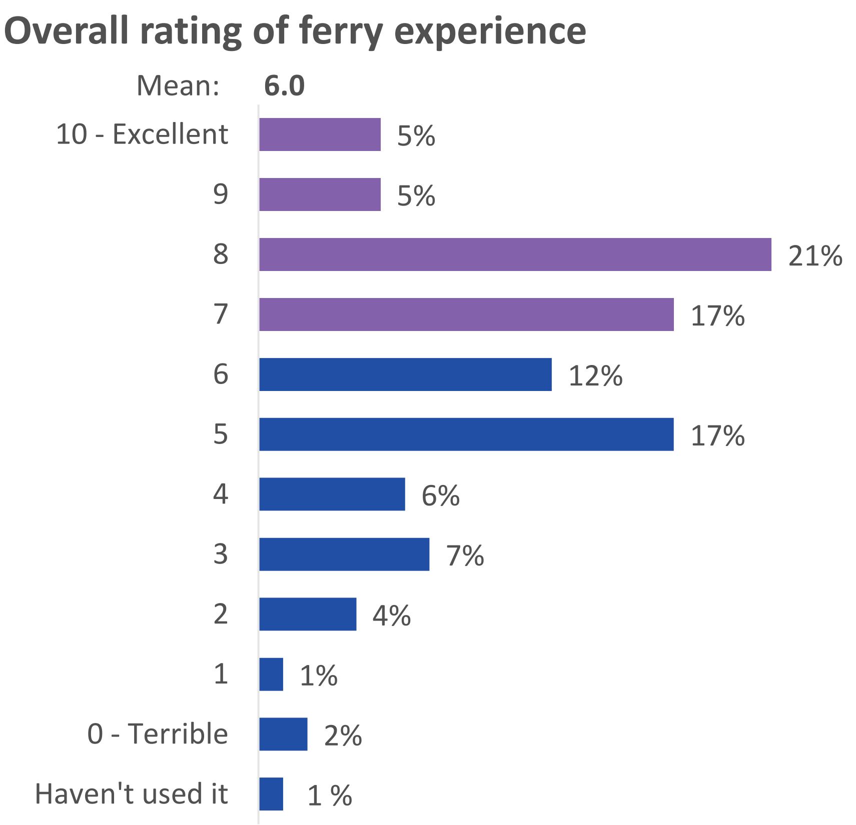
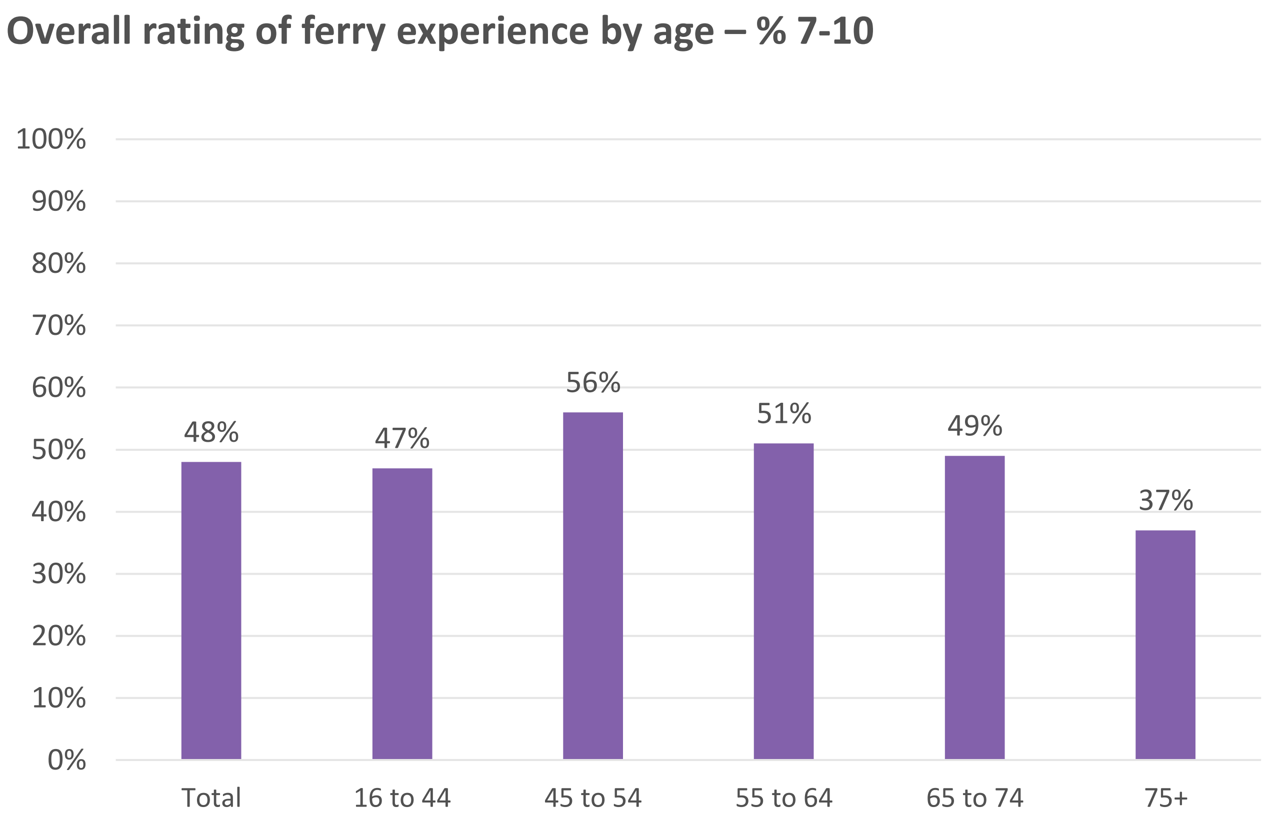
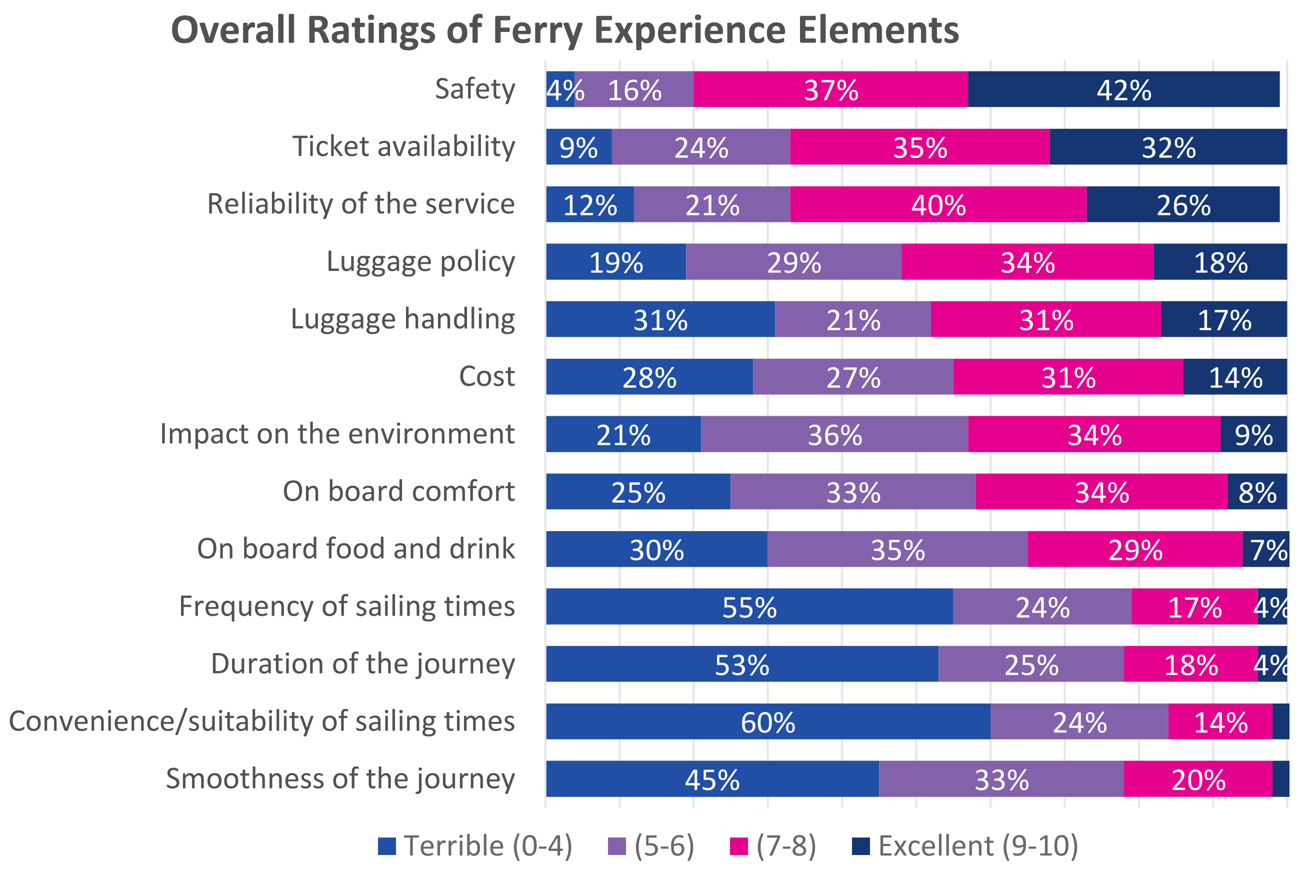
General experiences of the Scillonian are fairly positive – varying by age. This may reflect life-stage and associated needs e.g. time availability, children.





D1. Overall, how would you rate your general experience of the Scillonian? (335)

Resident satisfaction is lowest around the elements linked to scheduling rather than the actual onboard experience and cost.



Cost is rated somewhat favourably, with 45% of residents giving it a score of 7-10. This suggests that although cost of a journey is a key consideration in the number of crossings made, it is not driving high levels of dissatisfaction for residents.

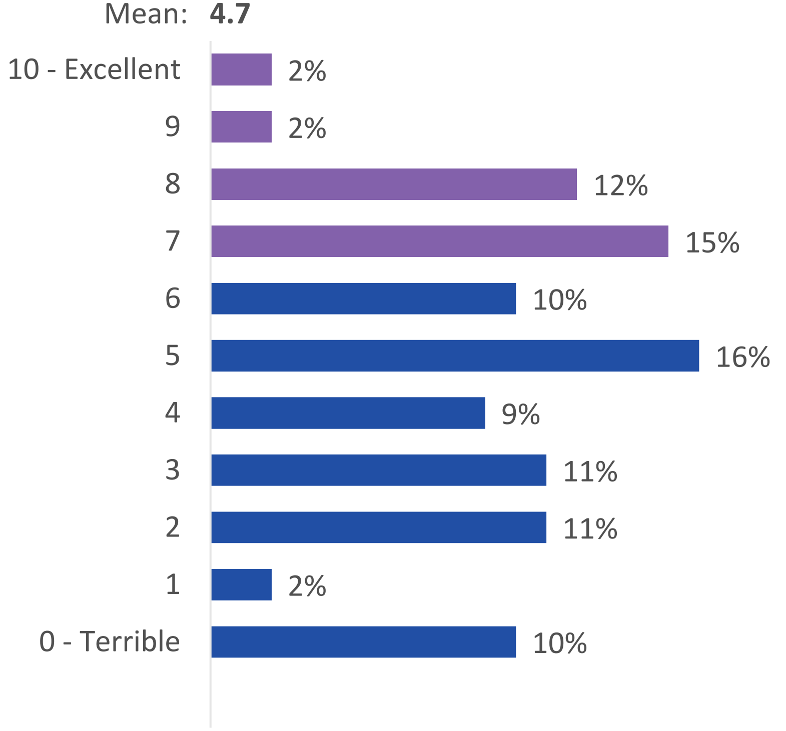
Residents who travel regularly on The Scillonian (5 or more times annually) gave lower scores to some elements of the experience:

- 100% gave the 'Frequency of sailing times' a score lower than 7, compared to 80% overall.
- 54% gave the 'Ticket availability' a score lower than 7, compared to 33% overall.
- 84% gave the 'On board comfort' a score lower than 7, compared to 58% overall.
- 73% gave the 'Luggage handling' a score lower than 7, compared to 52% overall.

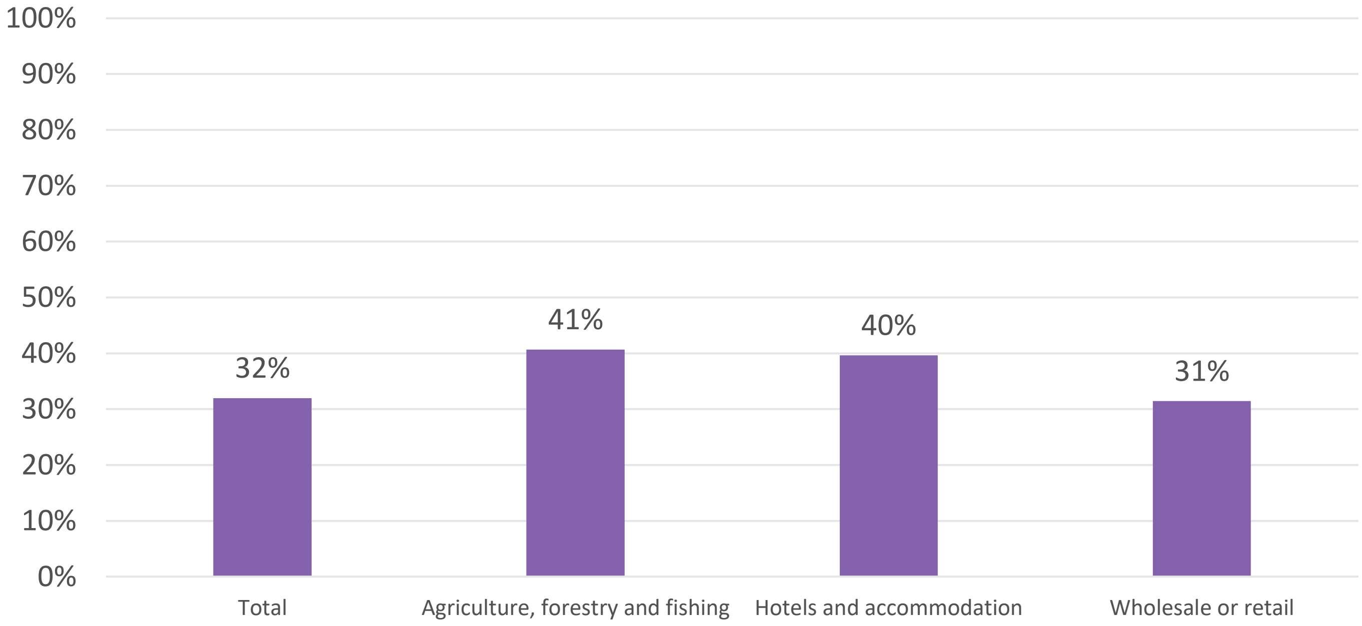
D2. How would you rate the Scillonian on the following: (329)

Perceptions of freight services are weaker – and are largely consistent by business sector.

Business Ratings of Ferry - Overall



Business Ratings of Ferry by Sector– % 7-10



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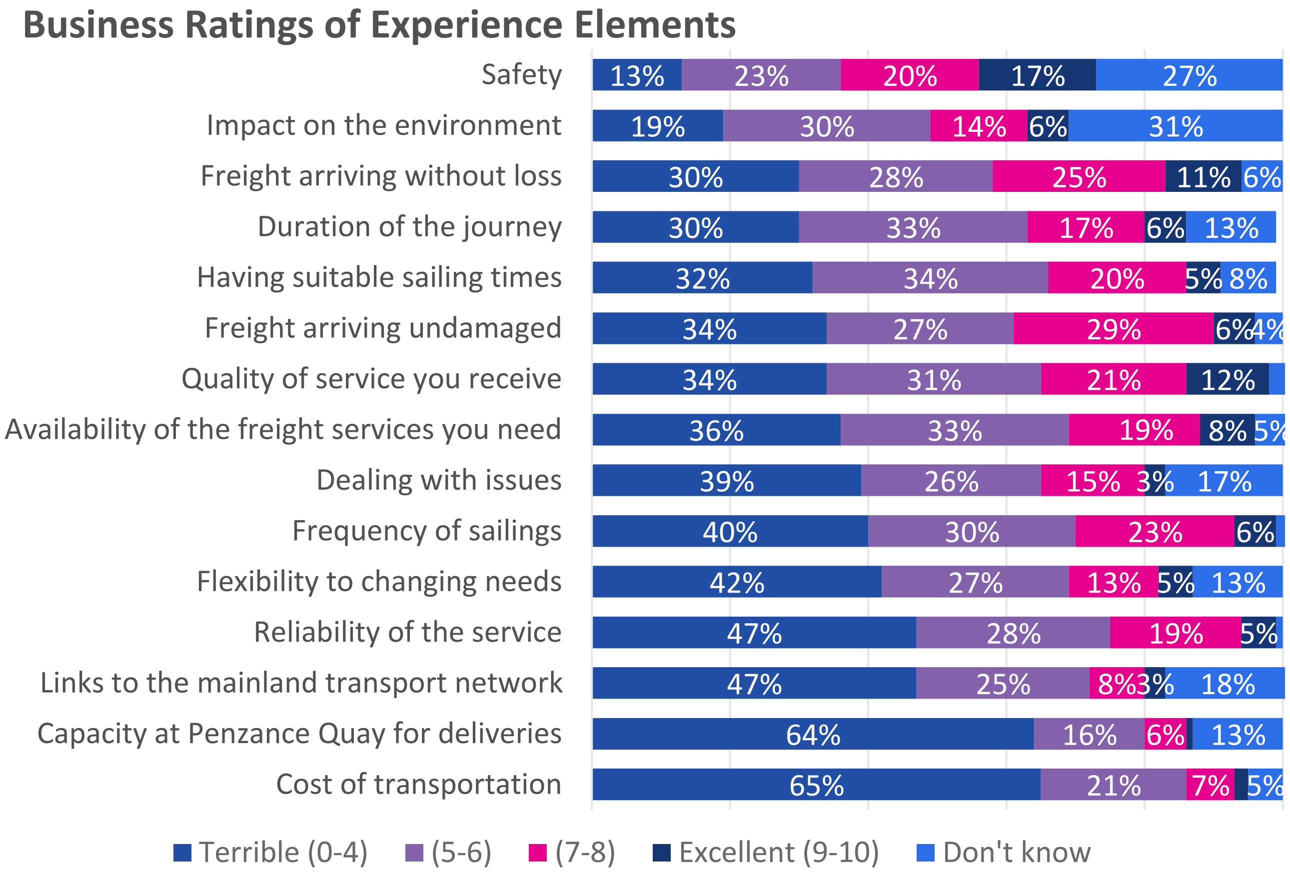
F9. Overall, how would you rate your businesses' experience of freight services to and from the Isles of Scilly? (127)

Businesses are most dissatisfied with costs, capacity at Penzance Quay and the links to the transport network.



Residents working in businesses in the ‘Wholesale or retail’ and ‘Hotels and accommodation’ sectors gave **higher** scores on average to some elements of the experience:

- 40% in ‘Wholesale or retail’ and 39% in ‘Hotels or accommodation’ gave the ‘Reliability of the service’ a score of 7 or higher, compared to 24% overall.
- 55% in ‘Wholesale or retail’ and 52% in ‘Hotels or accommodation’ gave ‘Safety’ a score of 7 or higher, compared to 37% overall.

F10. How would you rate freight services to and from the Isles of Scilly on the following: (331)

Passengers suggest improving the convenience and comfort of the Scillonian. Businesses prioritise the services, co-ordination and costs associated with transporting goods.

Suggestions for Improvements to Ferry – Residents

The main thing is the stability, as the crossings are so rough. Improve handling of passengers at the Penzance end. I'd like more outside seating.

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.

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

Suggestions for Improvements to Ferry – Businesses

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

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.

Better co-operation and/or co-ordination with mainland carriers.

D3. If you could improve the Scillonian, what would you do? (323)
F11. If you could improve freight services to and from the Isles of Scilly, what would you do? (265)

Attitudes to Fares

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We’ve measured attitudes to fares using the Van Westendorp Price Sensitivity Meter approach

Explanation of approach

Van Westendorp’s Price Sensitivity Model indirectly measures willingness to pay instead of directly posing the question.

Rather than asking potential buyers to identify a single price point, the Van Westendorp model assess a range of prices to identify different price points and generate price curves.

Survey respondents are asked to provide their price perspectives through four questions about the product/service:

- At what price would you consider it to be so expensive that you would not consider using it? (Too expensive)
- At what price would you consider it to be so cheap that you would be concerned to use it? (Too cheap)
- At what price would you consider it to be starting to get expensive, so that it is not out of the question, but you would have to give some thought to using it? (Expensive)
- At what price would you consider it to be a bargain? (Cheap)

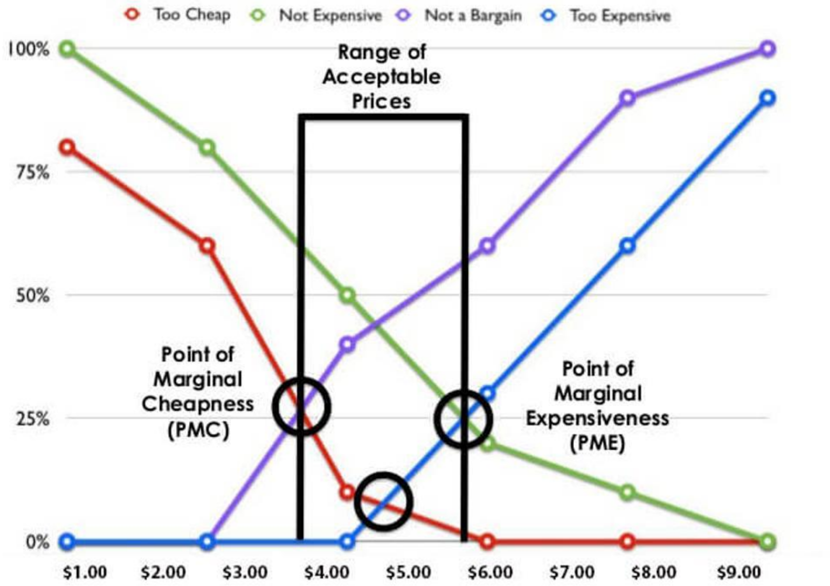
Additional considerations

- Proposed prices are likely to reflect that year-round residents are entitled to Travel Club membership. Travel Club members can claim 15% off Skybus fares and a reduced rate on board Scillonian III. Members also have exclusive access to a standby rate for same-day and next-day Skybus flights from Land’s End Airport if booked after 1pm.

Interpreting the Results

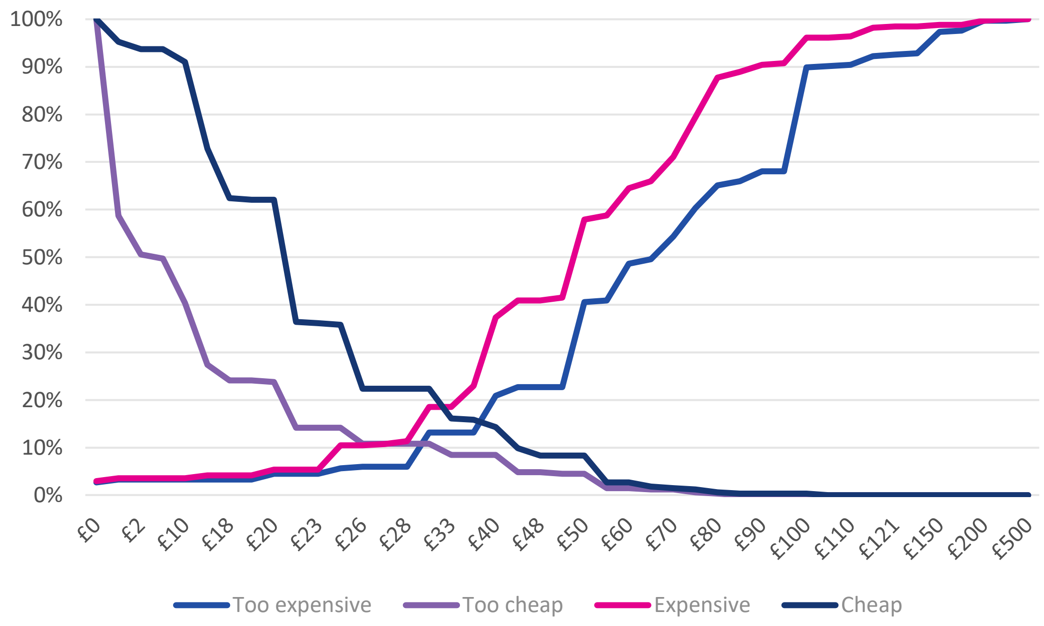
Results to the four questions are plotted using cumulative frequencies to create four price curves. Where these intersect identifies three price points:

- **Point of Marginal Cheapness:** The intersection of “too cheap” and “not a bargain”. If the price of the product is set any lower than this point, more buyers would say that the product is too cheap, and so this point acts as a lower bound of acceptable prices.
- **Point of Marginal Expensiveness:** The intersection of “too expensive” and “not expensive”. This acts as an upper bound of potential prices.
- **Optimum Price Point:** The intersection of the “too cheap” and “too expensive”. In theory, this price is the optimal price because it minimizes the number of people who are dissatisfied with the price one way or the other.



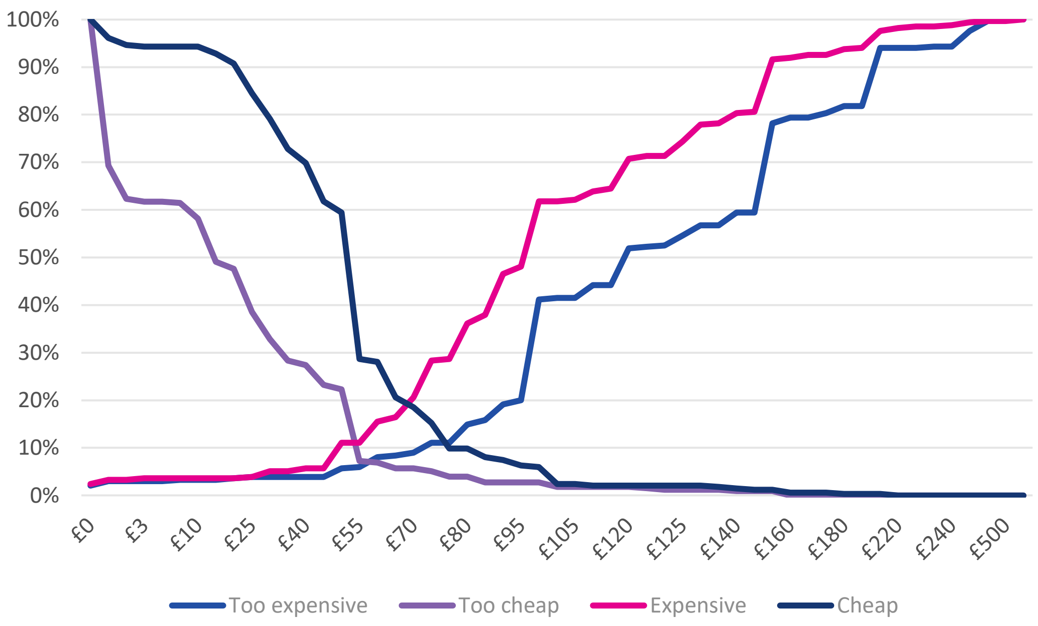
On average, residents felt that journeys on the Scillonian should cost around £26-£35, whereas the Skybus should cost £55-£79

Scillonian/Ferry



- Point of marginal cheapness: **£26**
- Optimal price point: **£30**
- Point of marginal expensiveness: **£35**

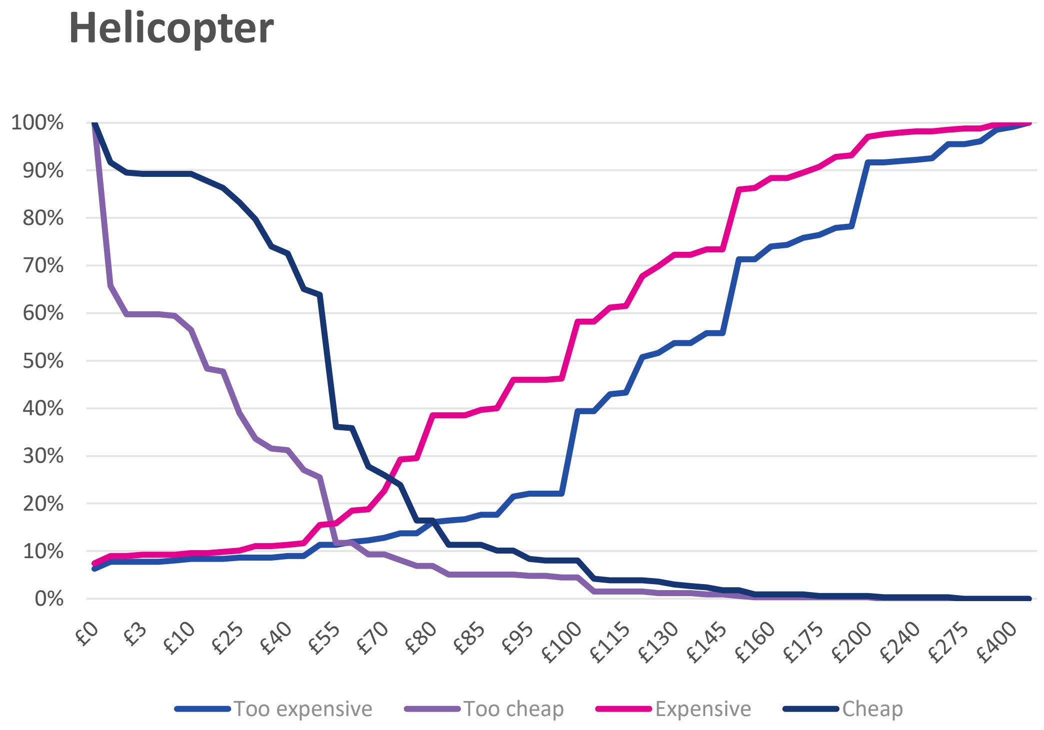
Skybus



- Point of marginal cheapness: **£55**
- Optimal price point: **£60**
- Point of marginal expensiveness: **£79**

E1. Thinking about the cost of an individual Scillonian journey and taking into account your resident discount… (335)
E2. Thinking about the cost of an individual Skybus journey and taking into account your resident discount… (335)

On average, residents felt that journeys by Helicopter should cost around £55-£80.

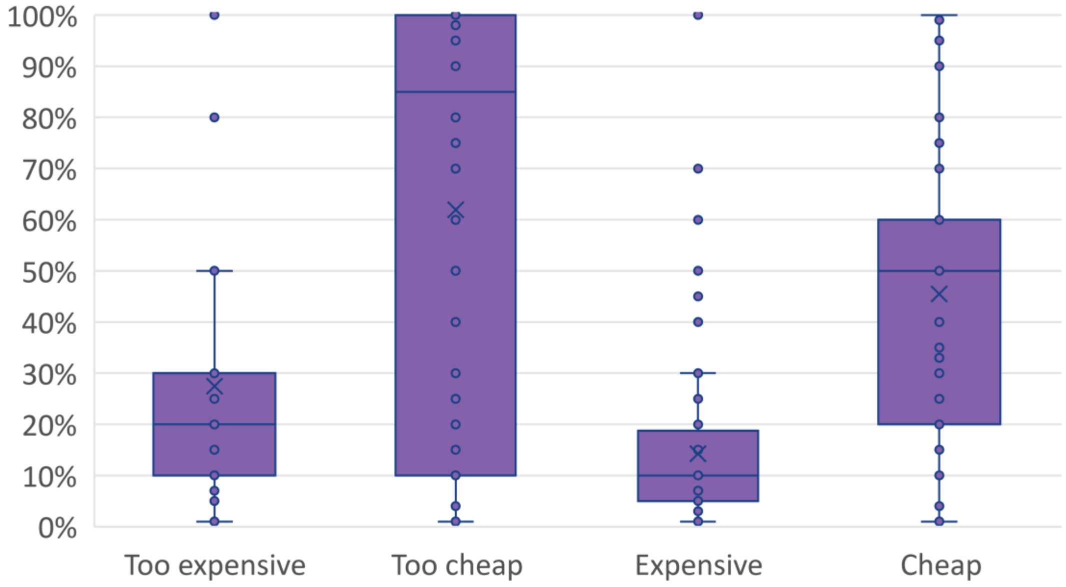


- Point of marginal cheapness: **£55**
- Optimal price point: **£60**
- Point of marginal expensiveness: **£80**

E3. Thinking about the cost of an individual helicopter journey to the mainland and taking into account your resident discount... (335)

On average businesses say that an increase of 14%, the costs of transporting freight begins to be concerning. This indicates that businesses are sensitive to relatively small increases in these costs

Business Freight Costs



- Mean % decrease that is considered too cheap: **67%**
- Mean % decrease that is considered a bargain: **49%**
- Mean % increase that is considered as starting to get expensive: **14%**
- Mean % increase that is considered too expensive: **26%**

Appendix

Respondent Profile – Demographics*

Age	Weighted	Unweighted
16 to 24	6%	1%
25 to 34	13%	5%
35 to 44	15%	11%
45 to 54	14%	18%
55 to 64	17%	22%
65 to 74	16%	21%
75+	17%	20%
Prefer not to say	1%	1%
Gender	**Weighted**	**Unweighted**
Male	45%	48%
Female	50%	47%
Prefer to self-describe	0%	1%
Prefer not to say	4%	4%

Household composition	Weighted	Unweighted
1	16%	17%
2	47%	53%
3	11%	8%
4 or more	23%	18%
Prefer not to say	4%	4%
Island of residence	**Weighted**	**Unweighted**
St. Mary's	78%	80%
Tresco	7%	4%
St. Martin's	7%	7%
St. Agnes	3%	4%
Bryher	5%	4%

* All figures are weighted. Where age and gender have not been provided, respondent's have been randomly assigned for the purposes of weighting.
A1. What is your age? (335)
A2. Please tell us your gender… (335)
A3. How many people, including yourself, live in your household? (335)
Background. Island (335)

Respondent Profile - Employment

Employment status	Weighted	Unweighted
Full time paid job (31+ hours)	25%	22%
Part time paid job (<31 hours)	5%	6%
Self–employed / have my own business	36%	36%
Freelancer/contractor	2%	1%
Work seasonally	2%	1%
Studying at university	2%	1%
Looking after home / Homemaker	1%	1%
Retired	23%	28%
Not in work due to ill health or disability	1%	1%
Unpaid work for a business, community or voluntary organisation	1%	1%
Prefer not to say	2%	2%

Sector of employment	Weighted	Unweighted
Hotels and accommodation	30%	31%
Agriculture, forestry and fishing	22%	16%
Wholesale or retail	15%	16%
Transport / Distribution	12%	10%
Professional, scientific and technical activities	11%	6%
Manufacturing	9%	4%
Public administration/government	9%	9%
Restaurants, take aways, catering and other food services	8%	8%
Education	7%	8%
Construction	6%	7%
Health and social work	6%	7%
Arts, entertainment and recreation	6%	6%
IT and communication	4%	3%
Water supply	3%	3%
Administrative and support service activities	3%	3%
Financial and insurance	2%	1%
Energy supply e.g. Electricity and gas	1%	1%
Real estate	1%	1%

Other employment	Weighted	Unweighted
No, I don't	54%	54%
Providing accommodation	22%	24%
Other hospitality	6%	5%
Delivery	1%	1%
Agriculture	9%	8%
Taxi driving / ride sharing / private hire	2%	1%
Boating services	6%	3%
Tourist services e.g. tours	8%	8%
Personal services e.g. cleaning, gardening, dog-walking	2%	3%
Selling products you have made/grown e.g. crafts, cakes	12%	11%
Online trading e.g. eBay dealing	7%	3%
Freelancing	5%	4%
Other	6%	6%

A4a. Which of these best describes your employment status? (335)
A4b. What sector is the business you own/work for in? (221)
A6. Do you personally have an income / make money through any of the following activities? (335)

Respondent Profile - Employment

Travel related employment	Weighted	Unweighted
IOS Steamship Group excluding Skybus	7%	8%
Skybus	2%	1%
St Mary's Harbour	2%	2%
St Mary's Airport	3%	2%
Council of the Isles of Scilly	25%	25%
The Duchy of Cornwall	5%	5%
Penzance helicopters	1%	0%
Tresco Estate	13%	10%
Penzance / Tresco heliport	1%	1%
None of these	57%	59%
Prefer not to say	3%	4%

Income	Weighted	Unweighted
Less than £5,000	4%	4%
£5,000-£9,999	8%	5%
£10,000-£14,999	7%	8%
£15,000-£19,999	10%	10%
£20,000-£24,999	14%	13%
£25,000-£29,999	8%	7%
£30,000-£34,999	9%	9%
£35,000-£39,999	5%	6%
£40,000-£44,999	5%	6%
£45,000-£49,999	7%	4%
£50,000-£59,999	4%	4%
£60,000-£69,999	1%	1%
£70,000-£84,999	1%	2%
£85,000-£99,999	1%	1%
More than £100,000	1%	1%
Prefer not to say	17%	19%

A5. Do you work, or have you ever worked, for any of the following? (335)
B1. What is your current personal income after tax? (335)

Respondent Profile - Financial Confidence and Comfort

How confident are you on the following?	Weighted				Unweighted			
	Extremely unconfident (0-4)	Slightly confident (5-6)	Confident (7-8)	Extremely confident (9-10)	Extremely unconfident (0-4)	Slightly confident (5-6)	Confident (7-8)	Extremely confident (9-10)
You will be able to save any money in the next 12 months	46%	19%	20%	15%	46%	20%	17%	17%
You could afford to pay an unexpected, but necessary, expense of £850	32%	14%	19%	36%	28%	13%	17%	41%
You will be able to pay all your household bills each month without using credit	12%	12%	25%	51%	13%	13%	22%	53%
You will be able to take a holiday abroad this year	48%	15%	17%	20%	49%	14%	14%	24%
You will be able to maintain your current standard of living	28%	25%	25%	23%	25%	27%	22%	25%
You will be able to travel to the mainland this year	18%	14%	24%	45%	18%	13%	20%	49%

B2. How confident are you on the following? (335)

Respondent Profile - Measures Taken to Cope with Cost of Living

What, if anything, are you doing differently as a result of the cost of living?	Weighted	Unweighted
Spending less on non-essentials	72%	70%
Using less fuel/energy e.g. electricity, in my home	69%	73%
Shopping around for lower prices	67%	66%
Buying cheaper brands / lower quality products	51%	51%
Cutting back on non-essential journeys	45%	47%
Delaying major purchases/spend items e.g. building work	40%	40%
Spending less on food shopping and essentials	39%	38%
Using my savings	36%	39%
Making energy efficiency improvements to my home	30%	31%
Working more hours / taking on an additional job	23%	17%
Walking more to save money	21%	21%
Checking that I am benefiting from all the financial support available to me (e.g. support on household costs)	18%	18%
Using credit more than usual, for example, credit cards, loans or overdrafts	17%	16%
Cutting back on home broadband or mobile data plans	16%	16%
Cycling more to save money	12%	13%
Looking for safe, warm and free places in my local community where I can go during the day	3%	3%
Using support from charities	1%	1%
None of these	5%	5%

B3. What, if anything, are you doing differently as a result of the cost of living? (335)

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