Orkney Islands Visitor Survey 2017
Executive Summary
Orkney Islands Council and VisitScotland
Background and method

Orkney Islands Council, in partnership with VisitScotland, commissioned Progressive to conduct a visitor survey on the Orkney Islands in 2017. The objectives of the research were to provide robust and up-to-date estimates of visitor volume and value, as well as information on experiences, motivations, behaviours and perceptions.

The research data was gathered using a 2 stage approach:
- Stage 1 – Calibration interviews conducted face-to-face with visitors at key exit points from the islands – ferry terminals and airport
- Stage 2 – Follow-up online survey to gather more detailed feedback

Stage 1 - Calibration Interviews
- In total, 5,485 calibration interviews were completed – 3,418 visitors; 1,977 island residents; 90 other
- The research included only people departing by ferry or air and therefore excluded cruise passengers and people travelling by yacht.

Stage 2 - Online Survey
- Respondents were asked if they would like to take part in an online survey at the end of the calibration interview.
- In total, 2,604 online survey invites were sent.
- The final sample response was 1,330 completed online surveys (51% response rate).

Calibration data was weighted to reflect the distribution of passengers at each airport/ferry terminal. Online data was weighted to reflect the profile of the calibration survey in terms of country of origin and trip type.
Profile of visitors to Orkney

Gender of Visitors
61% - Male  
39% - Female

Origin of Visitors
43% Scotland  
29% Rest of UK  
14% Europe  
8% North America  
6% Other Overseas

Age of Visitors
18% - 16-34  
14% - 35-44  
22% - 45-54  
25% - 55-64  
21% - 65+

Purpose of Visit
65% - Leisure/holiday  
14% - Visiting friends/relatives  
19% - Business

Been before?
51% First time  
49% Repeat visitor

Base (Age, gender, origin, purpose): All calibration visitors – 3,418  
Base (been before?): All online respondents – 1,295
Profile of leisure visitors

Leisure Visitors
65% of all visitors

Origin
27% Scotland
32% Rest of UK
20% Europe
12% North America
9% Other Overseas

Gender
58% - Male
42% - Female

Been before?
65% First time
35% Repeat visitor

Age
14% - 16-34
12% - 35-44
20% - 45-54
27% - 55-64
25% - 65+

Base (Age, gender, origin, purpose): All calibration visitors – 2,075
Base (been before?): All online respondents – 962
Profile of VFR visitors

Visiting Friends or Relatives (VFR)
14% of all visitors

Origin
63% Scotland
30% Rest of UK
2% Europe
2% North America
2% Other overseas

Gender
51% - Male
49% - Female

Been before?
18% First time
82% Repeat visitor

Age
22% - 16-34
14% - 35-44
19% - 45-54
22% - 55-64
24% - 65+

Base (Age, gender, origin, purpose): All calibration visitors – 510
Base (been before?): All online respondents – 185
Profile of business visitors

Business Visitors
19% of all visitors

Origin
80% Scotland
17% Rest of UK
2% Europe
0% Other overseas

Gender
81% - Male
19% - Female

Been before?
25% First time
75% Repeat visitor

Age
25% - 16-34
21% - 35-44
30% - 45-54
19% - 55-64
5% - 65+

Base (Age, gender, origin, purpose): All calibration visitors – 760
Base (been before?): All online respondents – 148
Planning a trip to Orkney

Planning the trip tends to start at least 3 months before travel. Leisure visitors are more inclined to plan further in advance than Business or VFR visitors.

How far in advance did you plan your trip?

<table>
<thead>
<tr>
<th>Duration</th>
<th>All Visitors</th>
<th>Business</th>
<th>VFR</th>
<th>Leisure</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 2 years</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>1 - 2 years</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>6 - 12 months</td>
<td>21%</td>
<td>10%</td>
<td>11%</td>
<td>18%</td>
</tr>
<tr>
<td>3 - 6 months</td>
<td>31%</td>
<td>28%</td>
<td>24%</td>
<td>35%</td>
</tr>
<tr>
<td>1 - 2 months</td>
<td>16%</td>
<td>14%</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>2 - 4 weeks</td>
<td>14%</td>
<td>8%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Less than 2 weeks</td>
<td>14%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Unsure</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Base (All): All 1295; Leisure 962; VFR 185; Business 148
Motivations to visit Orkney
Leisure visitors only

The scenery and the history/culture were the main factors influencing Leisure visitors to visit Orkney.

Some visitors were also inspired by TV programmes, travel features in the press and books on Orkney.

Key Reasons for Visiting Orkney
- Scenery and landscape – 64%
- History and culture – 62%
- Always wanted to visit – 50%

Inspiration for Visiting Orkney
- TV programme – 29%
- Travel feature in a newspaper/mag - 18%
- A book about Orkney - 12%
Information used to plan the visit
Leisure visitors only

Visitors used mainly online sources and talking with family and friends to plan for their trip → advocacy is important in encouraging people to visit the islands.

Indeed, 91% of Leisure visitors scored 8 or more out of 10 in terms of their likelihood to recommend Orkney to others.

Sources Used During Planning

- Websites – 73%
- Talking with friends/family – 37%
- Printed travel guide books – 28%

Google.co.uk
VisitOrkney.com
VisitScotland.com
Online information
Leisure visitors only

73% used websites when planning visit

Websites used during planning (top responses)
- Google search engine: 86%
- www.VisitOrkney.com: 63%
- www.VisitScotland.com: 51%
- Transport provider website: 49%
- Traveller review websites: 40%
- Tourism business provider’s website: 15%
- Travel guide websites: 10%
- Social media: 7%

Online information used during planning (top responses)
- Official tourist websites: 58%
- Traveller submitted reviews/ratings: 50%
- Professional photos: 27%
- Interactive maps displaying accom/attractions: 26%
- Traveller submitted photos: 18%
- Professional reviews/ratings: 15%
- Comments on online social network: 10%
- Professional online videos: 9%

Base (Leisure who used online info): 706
Trip profile
All visitors

Type of trip*
Approx. 85% - Overnight
Approx. 15% - Day visit

Areas visited (top 4)
97% - Kirkwall
76% - Stromness
68% - West Mainland
58% - East Mainland

No. of nights (overnight visitors only)
Average nights Orkney – 6.7

Transport during visit
69% - Car
9% - Bus
4% - Walked

No. of people in party
31% - One
50% - Two
17% - 3 to 5
2% - 6+

Accommodation
29% - Hotel
26% - Self-catering
19% - B&B/Guest house

*The calibration survey measured day visitors at 10%, however, due to sampling difficulties, passengers departing via Burwick Ferry Terminal were under-represented. Based on estimations of day visitors using this route, the total number of day visitors was revised to approx. 15%.

Base (Trip type, no of people): All calibration visitors – 3,418
Base (No of nights): Overnight calibration visitors – 3,108
Base (Accom., transport, areas): Online – 1,249 – 1,330
Trip profile
Leisure visitors

Type of trip*
Approx. 83% - Overnight
Approx. 17% - Day visit

Areas visited (top 4)
97% - Kirkwall
87% - Stromness
83% - West Mainland
71% - East Mainland

Transport during visit
67% - Car
11% - Bus
5% - Campervan

Accommodation
32% - Self-catering
26% - Hotel
23% - B&B/Guest house

No. of nights (overnight visitors only)
Average nights Orkney – 5.3

No. of people in party
17% - One
60% - Two
20% - 3 to 5
2% - 6+

*The calibration survey measured Leisure day visitors at 10%, however, due to sampling difficulties, passengers departing via Burwick Ferry Terminal were under-represented. Based on estimations of Leisure day visitors using this route, the total number of day visitors was revised to approx. 17%.
Sources of information used during trip
Leisure visitors only

Online sources of information were particularly important to Leisure visitors during their trip.

The majority also used printed materials, such as brochures and guidebooks, or visitor centres.

Half of Leisure visitors actively engaged with online or social media activity during or after their trip – most commonly to upload photos and update their Facebook status.

Sources of Information Used During Trip

- Websites – 76%
- Visitor info centres – 56%
- VS brochures – 38%
Evaluation of visitor experience

All visitors

Interactions with local people were a particular highlight for many visitors – most agreed they were made to feel welcome, the local people really added to their trip and they experienced excellent customer service.

The aspects of their trip which received the highest satisfaction scores were the quality and value for money (VFM) of visitor attractions, historic sites, etc. and the quality of local food and drink. The quality of accommodation was also widely regarded as excellent.
### Potential improvements

**All visitors**

<table>
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<tr>
<th>The main area of minority concern was digital coverage, including availability of free Wi-Fi, mobile phone signal coverage and availability of 3G/4G.</th>
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<tbody>
<tr>
<td>The range of food and drink choices and transport were the most mentioned suggested improvements (highlighted by less than 20% of visitors).</td>
</tr>
</tbody>
</table>

#### Rating of digital coverage

- **Availability of free Wi-Fi** – 35% (rated it less than 5)
- **Mobile phone signal coverage** – 40% (rated it less than 5)
- **Availability of 3G / 4G** – 51% (rated it less than 5)

#### Suggested improvements

Open ended comments suggested that for some visitors restaurant and food choices were limited; and more could be done regarding transport links across the Island.
Overall satisfaction with experience
Leisure visitors

The vast majority of visitors to Orkney provided a very positive evaluation of their experience on
the islands.

In total, 97% of Leisure visitors were satisfied with their trip – 84% were ‘very satisfied’.

- 76% agree that there is more to Orkney than they previously thought
- 88% agree that Orkney is worth visiting more than once. 62% scored at least 8 out of 10 in terms of their likelihood to return in the next 5 years.
- 84% of Leisure visitors were ‘very satisfied’ with their trip to Orkney
Volume and value of visitors

174,273 total visits in 2017

Ave. spend per person on Orkney - £291

Total value of visits: £49.56 million

VFR £5.4M
Leisure £37.4M
Business £6.8M

Leisure £325
VFR £208
Business £204

VFR 26,141
Leisure 115,020
Business 33,112

Base (All who provided spend data): Total 958; Leisure 740; VFR 121; Business 97
Technical appendix
The data was collected by face-to-face interviews (calibration) and an online survey. The target group for this research study was visitors to the Orkney Islands in 2017. The target sample size for the calibration interviews was 1,880 and the final achieved sample size was 3,418. The reason for the difference between these two samples was better than expected response rates at some sampling points. The target sample size for the online survey was 500 and the final achieved sample size was 1,330. The reason for the difference between these two samples was better than expected response rates for the calibration and online surveys. Fieldwork was undertaken between January and December 2017. Respondents were selected using probability random sampling, whereby interviewers selected every nth person passing their pre-selected sampling point. Respondents to internet self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that Progressive cannot strictly control sampling and in some cases, this can lead to findings skewed towards the views of those motivated to respond to the survey. The overall response rate to the survey was 51%. Due to the strict random sampling applied, the calibration data is representative of passengers at each sampling point. The data set was weighted to reflect the actual distribution of passengers across sampling points to ensure greater accuracy of results. The online data was skewed to Rest of UK and Leisure visitors and was, therefore, weighted on the basis of visitor type and origin based on the calibration data. An incentive of 5 x £100 Amazon vouchers (prize draw competition) encouraged a positive response to the survey. In total, 4 interviewers worked on data collection. Each interviewer’s work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by telephone or email) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where telephone details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.
The final data set was weighted to reflect:
- Calibration – distribution of passengers across the sampling points (airports and ferry terminals)
- Online – visitor type and origin (based on calibration data)

The calibration sample base before weighting is 3,418, whilst the weighted sample base is 3,673.
- The overall calibration sample size of 3,418 provides a dataset with a margin of error of between ±0.33% and ±1.66%, calculated at the 95% confidence level (market research industry standard).

The online sample base before weighting is 1,330, whilst the weighted sample base is 1,319.
- The overall online sample size of 1,330 provides a dataset with a margin of error of between ±0.53% and ±2.68%, calculated at the 95% confidence level (market research industry standard).

Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
- For online surveys these checks include:
  - Responses are checked for duplicates where unidentified responses have been permitted.
  - All responses are checked for completeness and sense.
  - Depending on the requirements of the survey, and using our analysis package SNAP, data is either imported from email responses received in a dedicated email inbox or stored directly on our dedicated server.

- For CAPI Questionnaires these checks include:
  - Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
  - Using our analysis package SNAP, data received via over-the-air synchronisation is imported from our dedicated server.
Technical appendix
Data processing and analysis

• A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
• Where “other” type questions are used, the responses to these are checked against the parent question for possible up-coding.
• Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
• A SNAP programme set up with the aim of providing the client with useable and comprehensive data. Crossbreaks are discussed with the client in order to ensure that all information needs are met.

• Data gathered using online surveys are validated using the following technique:
  • Internet surveys using lists use a password system to ensure that duplicate surveys are not submitted. The sample listing is also de-duplicated prior to the survey launch.

• All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.