Orkney Islands Visitor Survey 2017

Orkney Islands Council and VisitScotland

March 2018
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Project background

- Tourism is a major contributor to local economies in the Orkney Islands.

- Orkney Islands Council has key business objectives pertaining to tourism that cover sustainable growth, continuous development of high quality tourism products, and extending the season.

- Strategies to achieve these objectives need to be based on sound intelligence about the volume, value and nature of tourism to the islands, as well as a good understanding of how emerging consumer trends are influencing decisions and behaviours, and impacting on visitors’ expectations, perceptions and experiences.

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

- Progressive conducted a similar visitor survey on behalf of the Shetland Islands Council and Comhairle nan Eilean Siar. This report details findings from the Orkney Islands visitor survey only.
Project objectives

Identify visitor profile
- Demographics
- Country of origin
- Party composition
- Visitor type – Leisure, VFR, Business

Explore visitor journey
- Inspiration / motivations
- Planning and booking
- Sources of information
- Trip characteristics

Evaluate visitor experience
- Ratings of aspects of trip
- Overall satisfaction with visit to Orkney
- Propensity to recommend
- Propensity to visit again

Determine visitor volume and value
- Volumes of visitors to Orkney
- Categories of spend
- Overall value
Method

• 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
  - The calibration interviews were conducted using CAPI technology (Computer Aided Personal Interviewing)
  - Each interview lasted approximately 3 minutes
  - Data gathered included profiling data and type of trip – leisure, visiting friends and relatives (VFR), business
  - Sampling was spread across 2017 - 26th January to 15th December.
  - The sampling points were:
    - Kirkwall Airport
    - Stromness Ferry Terminal
    - Kirkwall (Hatston) Ferry Terminal
    - St Margaret’s Hope Ferry Terminal
    - Kirkwall Travel Centre – to interview people travelling via Burwick Ferry Terminal
  - Random sampling approach to achieve a representative sample of people leaving the islands in terms of visitors and island residents
  - In total, 5,485 calibration interviews were completed – 3,418 visitors; 1,977 island residents; 90 other
Method

- **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.
  - Email addresses were gathered and the survey was sent within a two-week period of the calibration interview, allowing them time to arrive home.
  - In total, 2,716 visitors to Orkney agreed to take part in the online survey. 112 email addresses bounced back leaving a potential sample size of 2,604.
  - The online survey remained open for 3 weeks for each visitor.
  - A reminder was sent halfway through the 3-week period.
  - The final sample response was 1,330 completed online surveys (51% response rate).

- **Additional stage - Qualitative interviews**
  - A small number of tele-depths were also conducted with respondents who agreed to take part in a follow-up discussion about their visitor experience – 6 tele-depths with visitors to Orkney.
  - These provided some qualitative insight on the visitor experience and potential areas for improvement.
  - Each lasted 30-40 minutes in length.
Method

Sampling challenges – calibration survey

- Due to the limited time between disembarking buses and boarding ferries, we were not able to interview visitors leaving via Burwick Ferry Terminal at the terminal itself. Instead, these visitors were interviewed in Kirkwall before boarding the buses for Burwick.

- This approach meant that we could not execute an accurate random sampling approach, which was needed to measure the proportion of visitors versus islanders leaving via this exit point. For this reason, Burwick is not included in the data estimating the relative proportions of islanders and visitors for all passengers leaving Orkney. Burwick passenger data are, however, included in all other data reported.
The margins of error associated with the data are detailed below. These are calculated at the 95% confidence interval (market research industry standard).

<table>
<thead>
<tr>
<th>Sample type</th>
<th>Sample size</th>
<th>Margin of error</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Calibration</td>
<td>5,485</td>
<td>+/- 0.26% to +/- 1.31%</td>
</tr>
<tr>
<td>Total Sample of Visitors - Calibration</td>
<td>3,418</td>
<td>+/- 0.33% to +/- 1.66%</td>
</tr>
<tr>
<td>Total Sample - Online</td>
<td>1,330</td>
<td>+/- 0.53% to +/- 2.68%</td>
</tr>
<tr>
<td>Leisure Visitors – Online</td>
<td>964</td>
<td>+/- 0.62% to +/- 3.13%</td>
</tr>
<tr>
<td>VFR Visitors – Online</td>
<td>185</td>
<td>+/- 1.43% to +/- 7.18%</td>
</tr>
<tr>
<td>Business Visitors - Online</td>
<td>181</td>
<td>+/- 1.45% to +/- 7.27%</td>
</tr>
</tbody>
</table>

All bases shown are the unweighted bases. Bases vary by question depending on routing. Where base sizes are low a caution sign is shown. Where figures do not add to 100% this is due to multi-coded responses or rounding. On some charts figures of 0% and 1% are not shown for ease of reading. Only statistically significant differences are reported.
The analysis detailed in this report includes highlighting statistically significant differences between sample sub-groups. Analysis by visitor type is provided on the total sample - Leisure, visiting friends and relatives (VFR), Business.

Analysis for other sub-groups is shown for the Leisure sample only. These sub-groups are:
- Origin 1 – Scotland; rest of UK; all overseas
- Origin 2 – Scotland; rest of UK; Europe; North America; other overseas
- Gender – male; female
- Age – 16 - 34; 35 - 44; 45 – 54; 55 – 64; 65+

The sample sizes for each sub-group (online sample) are detailed below:

<table>
<thead>
<tr>
<th>Visitor type</th>
<th>Base (unweighted)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure</td>
<td>964</td>
</tr>
<tr>
<td>VFR</td>
<td>185</td>
</tr>
<tr>
<td>Business</td>
<td>181</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Origin (Leisure)</th>
<th>Base (unweighted)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>238</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>387</td>
</tr>
<tr>
<td>All overseas</td>
<td>339</td>
</tr>
<tr>
<td>Europe</td>
<td>156</td>
</tr>
<tr>
<td>North America</td>
<td>111</td>
</tr>
<tr>
<td>Other overseas</td>
<td>72</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Demographics (Leisure)</th>
<th>Base (unweighted)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>546</td>
</tr>
<tr>
<td>Female</td>
<td>418</td>
</tr>
<tr>
<td>16 – 34</td>
<td>92</td>
</tr>
<tr>
<td>35 – 44</td>
<td>98</td>
</tr>
<tr>
<td>45 – 54</td>
<td>188</td>
</tr>
<tr>
<td>55 – 64</td>
<td>287</td>
</tr>
<tr>
<td>65+</td>
<td>293</td>
</tr>
</tbody>
</table>
The sampling plan was designed to provide a spread of interviews across exit points and months of the year.

Interviewing was therefore higher in the peak season months of July, August and September.

Passenger data by exit point was not available for all exit points at the start of the project, therefore, the sampling aimed to achieve a broad spread across points. Passenger data obtained at the end of 2017 indicated that the sample over-represented Kirkwall Airport and Hatston Ferry, and under-represented St Margaret’s Hope and Burwick. Weighting was, therefore, used to correct the data for these inconsistencies with actual passenger numbers.
Data weighting Calibration survey

- The calibration data was weighted by sampling point to reflect the actual distribution of visitors in 2017.
- Visitor numbers were provided by Orkney Islands Council (Stromness, Hatston), ferry operators (St Margaret’s Hope, Burwick) and HIAL (Kirkwall Airport).

### Sampling point

<table>
<thead>
<tr>
<th>Sampling Point</th>
<th>Actual Visitors</th>
<th>Sample (before weighting)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kirkwall airport</td>
<td>27%</td>
<td>35%</td>
</tr>
<tr>
<td>Stromness ferry</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td>St Margaret's Hope Ferry</td>
<td>17%</td>
<td>27%</td>
</tr>
<tr>
<td>Hatston Ferry</td>
<td>9%</td>
<td>16%</td>
</tr>
<tr>
<td>Burwick Ferry</td>
<td>3%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Base (All): 5,485
Data weighting

Online survey

- Due to the larger sample size and the random sampling approach to data collection, the calibration data is more accurate than the online data.

- Respondents to online surveys are also self-selecting, which can skew data.

- The profile of the online sample was, therefore, weighted to the calibration data to ensure it was representative in terms of visitor type and origin*.

- As the data here shows, the online data was, in fact, very similar to the calibration, the main adjustment being correcting for under-representation of Scotland visitors and over-representation of Rest of UK visitors.

*Note: The percentage in ‘other’ category (2%) from the calibration survey was distributed evenly across Leisure, VFR and Business codes for online weighting as no ‘other’ code was available online for reasons of routing.
Visitor profile
Visitor profile
Proportion visitors

- Just less than two thirds of all people interviewed for the calibration survey were visitors to Orkney.
- 35% were islanders and 1% were people in transit between islands; haulage drivers only visiting for the day; or people on a cruise or yacht trip.

*Burwick data is excluded from the calculation of % visitors as it was not possible to execute accurate random sampling of passengers leaving the islands via this ferry terminal. All Burwick passengers were interviewed in Kirkwall before they boarded buses to the ferry terminal.

CSQ1: Can I check that you are a visitor to Orkney, either on a holiday/leisure trip or a business trip?

Base (All calibration excluding Burwick*): 4,999
The majority of visitors to Orkney in 2017 were leisure visitors (65%). Approximately one fifth were visiting for business or work purposes, while 14% were visiting friends or relatives (VFR).

CQ3: Which of the following best describes your current visit to Orkney?

Base (All calibration visitors): 3,418
Visitor profile
Demographics

• The total sample of visitors to Orkney was skewed towards males (61%). This finding was influenced by the proportion of males amongst business visitors (81%). Leisure visitors were less likely to be males (58%) and VFR visitors were almost evenly split between males (51%) and females (49%).

• The majority of visitors were aged over 44 years old (68%), with 27% aged between 25 and 44 and only 5% 16 to 24.

CQ4: Gender
CQ5: Which of the following age groups are you in?
Visitor profile
Demographics

- VFR visitors were more evenly split between males and females than Leisure visitors (58% male).
- The age profile of VFR visitors was also slightly younger than general Leisure visitors; 36% were less than 45 years old, compared to 26% of Leisure visitors.

CQ4: Gender
CQ5: Which of the following age groups are you in?

Base (All Leisure / VFR calibration visitors): Leisure 2,075, VFR 510
Visitor profile
Demographics

- Business visitors were predominantly male (81%).
- There was a wide spread of age groups for business visitors with 54% aged 45 years or older and 46% under 45.

**Age and gender - Business**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 - 24</td>
<td>5%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>20%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>21%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>30%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>19%</td>
</tr>
<tr>
<td>65+</td>
<td>5%</td>
</tr>
<tr>
<td>Refused</td>
<td></td>
</tr>
</tbody>
</table>

Base (All Business calibration): 760
The majority of all visitors to Orkney in 2017 were from the UK (72%), with 43% from Scotland and 29% from the rest of the UK.

Of the 28% overseas visitors, the largest proportion was from Europe (14%), with a further 8% from North America, 5% from Australia/New Zealand and 1% from other countries.

Amongst Leisure visitors the proportion of overseas visitors was higher (41%) and the proportion of visitors from Scotland was lower (27%). This contrasts with VFR and Business visitors, who were predominantly from Scotland.

CQ2: Where do you normally live?
Visitor profile

Origin

- In total, 20% of Leisure visitors to Orkney were from Europe.
- The most prevalent European Leisure visitors were from Germany (6%).
- The USA accounted for 10% of Leisure visitors, while 6% were from Australia.
- European visitors tended to be younger than visitors from other countries (28% under 35), compared to overall average for all Leisure visitors of 15% under 35.

CQ2: Where do you normally live?
Visitor profile

Origin

- The largest proportion of visitors from Scotland came from the Highland Council area (17%).
- Around one tenth of visitors from Scotland came from Edinburgh, Aberdeen or Aberdeenshire.
- This profile of visitors was very similar across Leisure, VFR and Business visitors.

Q77: Which local authority area do you live in?

Base (All Scotland visitors): 484
Visitor profile
Origin

• Visitors from England came from a variety of regions.

• The top origin locations were the North West, Yorkshire/Humberside, the South East and the South West.

• There were no significant differences in these findings between Leisure, VFR and Business visitors.

Origin – England visitors

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>North West</td>
<td>16%</td>
</tr>
<tr>
<td>Yorkshire/Humberside</td>
<td>15%</td>
</tr>
<tr>
<td>South East</td>
<td>15%</td>
</tr>
<tr>
<td>South West</td>
<td>13%</td>
</tr>
<tr>
<td>Greater London</td>
<td>10%</td>
</tr>
<tr>
<td>North East</td>
<td>8%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>8%</td>
</tr>
<tr>
<td>East Anglia/East of England</td>
<td>7%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>7%</td>
</tr>
</tbody>
</table>
Visitor profile
First time/repeat visitors

- Approximately half of visitors to Orkney reported that they had been to the islands before, while half were on their first visit.

- Almost two thirds of Leisure visitors were first time visitors, while the majority of VFR (82%) and Business (75%) visitors had been before.

- Amongst the Leisure visitors, overseas visitors were more likely to be first time visitors (84%) than Scotland (36%) or rest of UK visitors (67%).

- Visitors from Europe (20%) were more likely to have been to Orkney before than those from North America (11%) or other overseas (10%).

Q16: Approximately how many times have you visited Orkney before your recent trip?

Base (All, excl. rotation shift workers): Total 1,295; Leisure 962; VFR 185; Business 148
Visitor journey
Business journey

- The largest proportion of Business visitors had been to Orkney to work for a period of time.
- A further one third were attending a meeting.

Q3: What was the reason you went to Orkney for business?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To work</td>
<td>56%</td>
</tr>
<tr>
<td>A meeting</td>
<td>34%</td>
</tr>
<tr>
<td>Conference / trade fair</td>
<td>2%</td>
</tr>
<tr>
<td>To sell to customers</td>
<td>4%</td>
</tr>
<tr>
<td>To pitch for potential business</td>
<td>2%</td>
</tr>
<tr>
<td>To research market, etc.</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>

Base (All business): 180
Visitor profile
Business

- Overnight Business visitors were asked if they would be staying on the islands for an extended period of time, but normally live on the mainland. Just over one quarter of business respondents stated that they were staying for a long period of time.

CQ3b: Was your visit to this island to work for an extended period of time, but you normally live on the mainland, e.g. you are on a rotational shift pattern?

Rotational shift workers

- 27% Rotational shift workers
- 73% Other business

Base (All Business calibration): 760
Visitor profile
Business

- A wide range of business sectors were cited by Business visitors. The most prevalent were health services and engineering.
- 17% of business respondents (29 respondents) stated another sector not listed. These included farming/agriculture (5 responses), entertainment/arts (4 respondents) and legal services (3 respondents).

Q80: What industry do you work in?

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health services</td>
<td>13%</td>
</tr>
<tr>
<td>Engineering</td>
<td>10%</td>
</tr>
<tr>
<td>Education</td>
<td>6%</td>
</tr>
<tr>
<td>Building/construction</td>
<td>6%</td>
</tr>
<tr>
<td>Food/drink manufacture</td>
<td>6%</td>
</tr>
<tr>
<td>Oil/gas</td>
<td>6%</td>
</tr>
<tr>
<td>Government/local government</td>
<td>6%</td>
</tr>
<tr>
<td>Fishing/fish farming/aquaculture</td>
<td>5%</td>
</tr>
<tr>
<td>Renewable energy</td>
<td>5%</td>
</tr>
<tr>
<td>Transport – shipping, etc.</td>
<td>4%</td>
</tr>
<tr>
<td>Tourism, catering and hospitality</td>
<td>4%</td>
</tr>
<tr>
<td>Retail sales/service</td>
<td>4%</td>
</tr>
<tr>
<td>Financial services</td>
<td>3%</td>
</tr>
<tr>
<td>Charity / non-profit organisation</td>
<td>2%</td>
</tr>
<tr>
<td>IT</td>
<td>2%</td>
</tr>
<tr>
<td>Industrial manufacturing</td>
<td>1%</td>
</tr>
<tr>
<td>Media</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>17%</td>
</tr>
</tbody>
</table>

Base (All business): 180
Visitor profile

Summary

- Almost two thirds of visitors to Orkney in 2017 were visiting for leisure purposes, while 14% were visiting friends and relatives and 19% were on a work/business trip.

- The profile of all visitors was skewed to males (61%) and those aged 45 years or older (68%).
- A high proportion of Business visitors were male (81%), compared to Leisure (58%) and VFR (51%) visitors.

- The majority of visitors (72%) come from the UK – with 43% from Scotland and 29% from the rest of the UK.
- Amongst Leisure visitors, 59% were from the UK (27% Scotland; 32% rest of UK). Overseas Leisure visitors were predominantly from Europe (20%), with many also visiting from North America (12%) and Australia/New Zealand (8%).

- Almost two thirds of Leisure visitors were visiting Orkney for the first time.
- VFR (82%) and Business visitors (75%) were more likely to be repeat visitors to the islands.
Visitor Journey
Why did you visit Orkney?

- The key reasons for visiting Orkney cited by Leisure visitors were the scenery and landscape (64%) and the history and culture (62%).

- Archaeology also featured highly, being mentioned by 40%, while just over one third were interested in a specific attraction.

- Getting away from it all was more often mentioned by visitors from Scotland (27%), rest of UK (27%) or Europe (24%), than those from North America (11%) or other overseas (8%). This suggests that getting away from it all is not a motivation for long haul travellers.

- North American (68%) and other overseas visitors (74%) were the most likely to select history and culture. Visitors from North America were the most likely to say they had always wanted to visit Orkney (59%).

- Getting away from it all and the scenery were more likely to be mentioned by females and younger respondents than males and older respondents. The older age groups were more likely than the younger age groups to mention an interest in archaeology.

Q1: What were your main reasons for visiting Orkney for your recent trip?

- The scenery and landscape
- The history and culture
- Always wanted to visit
- Interest in archaeology
- To visit a particular attraction
- Been before and wanted to come again
- To get away from it all
- Reputation for friendly people
- Specific towns/villages
- A specific sport or activity
- To visit family/friends
- Range of activities available
- Geoparks / geology
- The climate and weather
- The Northern Lights
- An event or festival
- Closeness to home
- A personal event
- Something else

Base (All Leisure): 964
Visitor journey
Inspiration

- Approximately half of Leisure visitors reported that they had been inspired to visit Orkney by something they had seen or read.

- TV programmes were mentioned by 29% of respondents. These included Britain’s Ancient Capital, Ness of Brodgar, programme by Neil Oliver, Coast, Grand Tours of the Scottish Islands and Islands on the Edge.

- Books about Orkney were reported to have inspired 12% of Leisure visitors. These included The Outrun, Neil Oliver’s books and The Islands of Orkney.

- Overseas visitors were more likely to be inspired by books, films, TV, etc. (61%) than those from Scotland (41%) or the rest of UK (49%).

- 32% of overseas visitors overall mentioned being inspired by a travel feature. Watching a TV programme was most inspirational to rest of UK (39%) and other overseas (36%) visitors.

- TV programmes were also more inspiring to over 55 year olds (35%) than under 55s (22%).

Inspiration for visiting Orkney - Leisure visitors

Q2: And did any of these prompt you to consider Orkney for this trip?

<table>
<thead>
<tr>
<th>Option</th>
<th>Base (All Leisure): 964</th>
</tr>
</thead>
<tbody>
<tr>
<td>Watching a TV programme</td>
<td>29%</td>
</tr>
<tr>
<td>A travel feature in a newspaper, etc.</td>
<td>18%</td>
</tr>
<tr>
<td>A book about Orkney or set in Orkney</td>
<td>12%</td>
</tr>
<tr>
<td>Watching/reading about islands people in media/news</td>
<td>9%</td>
</tr>
<tr>
<td>Online video content</td>
<td>6%</td>
</tr>
<tr>
<td>Advertising or other marketing</td>
<td>6%</td>
</tr>
<tr>
<td>A movie/film about the islands</td>
<td>2%</td>
</tr>
<tr>
<td>None of these</td>
<td>48%</td>
</tr>
</tbody>
</table>
Qualitative Findings
Reasons for visiting Orkney

Many qual respondents also visited for the scenery, history and archaeology, but often they also had very personal reasons for their visit.

The reason for going this year was that my husband has now retired, as soon as he watched the film ‘Heart of Orkney’ by Neil Oliver he wanted to go and we could plan anytime.

I have a special emotional connection with Orkney. My friend painted me a picture of the Standing Stones of Stenness and then died shortly after ... I always wanted to visit.

One respondent had written a thesis on the architecture of Orkney and the Scottish islands...

It was great to get the opportunity to go and see what I’d been reading about for so long. As soon as my brother said he was up for it, we decided it was a go.

Various members of the family had connections in the pre-Roman time

We had been to Arran and decided to visit all of the Scottish islands ... we love walking our dog and the outdoors... members of the National Trust and also love historical sites... Shetland was too far but we could fit in a few days in Orkney.
Visitor journey Planning

- Across the total sample of all visitors the majority (75%) planned their visit to Orkney within 6 months of travel.

- Just over one quarter of visitors planned their visit within one month of travel, suggesting that many people visited based on a fairly last minute decision.

- However, the level of advance planning varied by visitor type, with Leisure visitors the most likely to plan a long time in advance and Business visitors the most likely to make plans close to their date of departure. Full details of planning by each visitor group are shown over.

Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

How far in advance did you plan your trip?

Base (All except rotational shift workers): 1295

- More than 2 years: 1%
- 1 - 2 years: 3%
- 6 - 12 months: 21%
- 3 - 6 months: 31%
- 1 - 2 months: 16%
- 2 - 4 weeks: 14%
- Less than 2 weeks: 14%
- Unsure: 1%
Visitor journey Planning

- Leisure visitors showed the highest levels of advance planning – one third planned more than 6 months before their visit and 37% started their planning 3 to 6 months in advance.

- By contrast VFR visitors were more likely to plan their visit less than 3 months before – 63% decided on their visit less than 3 months before.

- As we might expect, Business visitors had the lowest levels of advance planning. Indeed, 62% of Business visitors started planning their trip within one month of travel.

**Q4:** How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

**Base (All except rotational shift workers): Leisure 962; VFR 185; Business 148**
Visitor journey Planning

- Leisure visitors from Scotland were the most likely to start planning within a month of travel (24%). Visitors from North America (46%) and other overseas (45%) were the most likely to plan more than 6 months in advance.

Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

How far in advance did you plan your trip? – by market (Leisure only)

- More than 2 years: 1% (Scotland), 1% (Rest of UK), 1% (Overseas)
- 1 - 2 years: 4% (Scotland), 4% (Rest of UK), 4% (Overseas)
- 6 - 12 months: 25% (Scotland), 30% (Rest of UK), 28% (Overseas)
- 3 - 6 months: 31% (Scotland), 37% (Rest of UK), 41% (Overseas)
- 1 - 2 months: 16% (Scotland), 13% (Rest of UK), 13% (Overseas)
- 2 - 4 weeks: 8% (Scotland), 6% (Rest of UK), 12% (Overseas)
- Less than 2 weeks: 7% (Scotland), 12% (Rest of UK), 6% (Overseas)
- Unsure: 1% (Scotland), 1% (Rest of UK), 1% (Overseas)

Base (All except rotational shift workers): Scotland 238; rest of UK 386; overseas 338
Visitor journey
Booking

• Patterns of data in terms of booking the trip are very similar to those for planning – the majority overall (80%) book within 6 months.

• However, although 25% planned their trip more than 6 months before travel, only 13% booked this far in advance, suggesting that some held off booking for some months. This may have been necessary if travel operators timetables were not available at the point of planning.

• Again, differences were noted between the three visitor sub-groups, as noted over.

Q5: How far in advance did you book your trip? I.e. how much time was there between booking the trip and going?

How far in advance did you book your trip?

- Over 1 year: 1%
- 6 mths - 1 year: 12%
- 3 - 6 months: 30%
- 1 - 2 months: 17%
- 2 - 4 weeks: 15%
- Less than 2 weeks: 18%
- Unsure: 1%
- Didn't book in advance: 6%

Base (All except rotational shift workers): 1,295
Visitor journey
Booking

- Mirroring the pattern of response for planning, Leisure visitors were the most likely to book their trip to Orkney some time in advance of travel – 56% booked more than 3 months before visiting.

- Business and VFR visitors were more likely to book within one month of travel – 72% of Business visitors and 46% of VFR visitors.

Q5: How far in advance did you book your trip? I.e. how much time was there between booking the trip and going?

Base (All except rotational shift workers): Leisure 962; VFR 185; Business 148
Visitor journey
Booking

- Visitors from Scotland were the more likely to book within a month of travel (30%) than those from the rest of the UK (19%) or overseas (14%).

- For visitors from the rest of the UK and overseas the typical timing of booking is 3 to 6 months before the trip (rest of UK 40%; overseas 42%).

Q5: How far in advance did you book your trip? I.e. how much time was there between booking the trip and going?
Visitor journey
Sources of information

- Websites were the key source of information for Leisure visitors when planning their trip. Word of mouth is also critical, with 37% citing family and friends.

- Travel professionals/providers are also important – 17% cited calls to travel providers, 7% visited visitor information offices and 5% mentioned advice from travel professionals.

- Social media was mentioned by 6% of visitors, while 3% mentioned apps, including VisitScotland, Expedia, Tripadvisor, Booking.com, Google maps and Airbnb.

- Over 65 year olds were more likely to call travel providers and info offices directly than those in younger age groups. Younger age groups were more likely to use social media and websites than older respondents.

Q6: Which of the following sources of information did you use when planning your visit to Orkney?

- Websites: 73%
- Talking with friends / family: 37%
- Printed travel guide books: 28%
- Calls to travel providers: 17%
- Printed brochures: 14%
- Calls / visits to visitor info offices: 7%
- TV / radio: 6%
- Social media: 6%
- Advice from travel professionals: 5%
- Newspapers / magazines: 3%
- Apps: 3%
- E-newsletter from an organisation: 2%
- Other: 4%
- None: 5%
Visitor journey

Sources of information during planning - by market (Leisure only)

- There were some interesting variations in sources of information used by Leisure visitors when the data was analysed by visitor origin.

- Overseas Leisure visitors were more likely to use printed travel books (43%) than those from Scotland (15%) or the rest of the UK (22%).

- Overseas visitors were also more likely to take advice from travel professionals (10%) than those from Scotland (1%) or the rest of the UK (3%).

- Overseas visitors (78%) and rest of UK visitors (74%) were more likely to use websites than visitors from Scotland (65%).

- Visitors from Scotland were the most likely to talk to friends and family (46%; Rest of UK 38%; overseas 29%) or call travel providers (26%; Rest of UK 17%; overseas 10%).

Q6: Which of the following sources of information did you use when planning your visit to Orkney?

- Websites
- Talking with friends / family
- Printed travel guide books
- Calls to travel providers
- Printed brochures
- Calls / visits to visitor info offices
- TV / radio
- Social media
- Advice from travel professionals
- Newspapers / magazines
- Apps
- E-newsletter from an organisation
- Other
- None

Base (All Leisure): Scotland 238; rest of UK 387; overseas 339
Visitor journey
Sources of information

- Leisure visitors who had sought information online were asked which websites or search engines they had used. The majority of these visitors (86%) reported using the Google search engine as a starting point.

- The two key tourism websites cited were VisitOrkney.com (63%) and VisitScotland.com (51%).

- Almost half also reported using transport providers’ websites, whilst 40% looked at traveller review websites.

Q8: What types of websites or search engines did you use when planning your visit to Orkney? Please think only about information gathering during planning your trip rather than booking the trip.

Websites and search engines used - Leisure visitors

- 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%
- Travel search engine website: 4%
- Specialist tour operator websites: 4%
- Travel agency websites: 4%
- Magazine/newspaper websites: 3%
- Other search engine: 7%
- Other website: 7%
- Unsure: 1%

Base (Leisure who used online info): 706
Visitor journey
Sources of information

- Overseas visitors tend to use a wider variety of websites than Scotland and rest of UK visitors.

- VisitScotland.com was more likely to be used by overseas visitors (66%) than Scotland (43%) or rest of UK visitors (39%). In particular, a high proportion of Europeans (74%) used the site.

- Traveller review websites were also more likely to be used by overseas visitors (48%) – especially North Americans (56%) and other overseas (60%).

- A higher proportion of overseas visitors also used travel guide websites (16%), compared to Scotland (5%) and rest of UK (6%) visitors.

Websites and search engines used - by market (Leisure only)

<table>
<thead>
<tr>
<th>Source of Information</th>
<th>Scotland</th>
<th>Rest of UK</th>
<th>Overseas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google search engine</td>
<td></td>
<td></td>
<td>93%</td>
</tr>
<tr>
<td><a href="http://www.VisitOrkney.com">www.VisitOrkney.com</a></td>
<td></td>
<td>56%</td>
<td></td>
</tr>
<tr>
<td><a href="http://www.VisitScotland.com">www.VisitScotland.com</a></td>
<td></td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>Transport provider website</td>
<td></td>
<td>46%</td>
<td>56%</td>
</tr>
<tr>
<td>Traveller review websites</td>
<td></td>
<td>32%</td>
<td>48%</td>
</tr>
<tr>
<td>Tourism business provider’s website</td>
<td></td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td>Travel guide websites</td>
<td></td>
<td>5%</td>
<td>16%</td>
</tr>
<tr>
<td>Social media</td>
<td></td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Travel search engine website</td>
<td></td>
<td>3%</td>
<td>9%</td>
</tr>
<tr>
<td>Specialist tour operator website</td>
<td></td>
<td>1%</td>
<td>6%</td>
</tr>
<tr>
<td>Travel agency websites</td>
<td></td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>Magazine/newspaper websites</td>
<td></td>
<td>1%</td>
<td>7%</td>
</tr>
<tr>
<td>Other search engine</td>
<td></td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Other website</td>
<td>3%</td>
<td>7%</td>
<td></td>
</tr>
</tbody>
</table>

Q8: What types of websites or search engines did you use when planning your visit to Orkney? Please think only about information gathering during planning your trip rather than booking the trip.
Visitor journey
Sources of information

- Reflecting the high proportions visiting the VisitOrkney and VisitScotland websites, many visitors (who had viewed online info) reported that they had looked at official tourist websites.

- The importance of traveller reviews was also confirmed, with 50% reporting that they looked at these during the planning process. Almost one fifth of these respondents also reported looking at traveller submitted photos online.

- Over a quarter of people who used online sources also reported looking at professional photos or interactive maps.

Q9: Which of the following types of online information did you use when planning your visit to Orkney?

- 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%
- Traveller submitted online video content: 6%
- Company info/promo on online social network: 4%
- None of these: 14%

Base (Leisure who used online info): 706
**Visitor journey**

**Sources of information**

- Again, overseas visitors were more likely to use a wide range of online information than visitors from Scotland or the rest of the UK.

- For example, overseas visitors (55%) were more likely than those from the rest of the UK (45%) to mention traveller submitted reviews. Visitors from North America (64%) and other overseas (69%) were especially likely to look at traveller reviews.

- Visitors from overseas were also more likely to look at professional reviews (21%) than visitors from Scotland (9%) or the rest of the UK (12%).

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**Online information used - by market (Leisure only)**

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Scotland</th>
<th>Rest of UK</th>
<th>Overseas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Official tourist websites</td>
<td>53%</td>
<td>61%</td>
<td>60%</td>
</tr>
<tr>
<td>Traveller submitted reviews/ratings</td>
<td>49%</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>Professional photos</td>
<td>34%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Interactive maps displaying accom/attractions</td>
<td>22%</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>Traveller submitted photos</td>
<td>15%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>Professional reviews/ratings</td>
<td>12%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Comments on online social network</td>
<td>10%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Professional online videos</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Traveller submitted online video content</td>
<td>5%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Company info/promo on online social network</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>None of these</td>
<td>8%</td>
<td>17%</td>
<td></td>
</tr>
</tbody>
</table>

Base (Leisure who used online info): Scotland 154; rest of UK 286; overseas 266
Qualitative Findings
Sources of information

Many qual respondents used review websites, but knew to take these with a ‘pinch of salt’

I find that trip adviser gives you a false view. More people who want to moan will use it to vent than to talk about how it was good or even great ... We find that if you like the sound of someone over the phone, it's normally a good place to go – who cares if they have Egyptian cotton sheets!

You can tell who the excessively moany people are ... but it gives you a flavour of what the place looks like. If it’s a cheap place you can’t expect The Ritz!
Visitor journey
Booking

- Very few visitors to Orkney in 2017 reported that they had booked their trip as a package – only 6% in total.

- Independent travel was prevalent across all visitor types. Proportions of package booking were particularly low for VFR (1%) and Business (3%) visitors, however, Leisure visitors were also predominantly independent travellers (91%).

- Overseas Leisure visitors were more likely to book a package (11%) than those from Scotland (3%) or the rest of the UK (6%).

Q27: Did you book your trip to Orkney as a package?
Visitor journey
Booking

• Only 6% of visitors reported booking their trip as a package.

• Of these, the majority (78%) booked this through a tour operator or travel company.

• Most commonly the booking was made via the tour operator’s website.

Q37: How did you book your package to [Shetland / Orkney / the Outer Hebrides] for your recent trip?
For visitors who did not book a package, the most common way of booking accommodation was directly with the accommodation provider.

Such bookings tend to be made online on the accommodation providers’ website (47%). However, significant proportions also reported booking by email (39%) or by telephone (40%).

Online travel agents were also mentioned by 16% of overnight visitors, while 6% reported using a ‘homestay’ website such as Airbnb.

It is also interesting to note that 15% of visitors did not book their accommodation in advance. These respondents were more likely to be VFR visitors (46%) than Leisure (9%) or Business visitors (7%).

Full data pertaining to methods of booking accommodation for Leisure visitors is detailed over.

Q29: How did you book your accommodation (e.g. hotel, self-catering, camping, etc.) for your recent trip to Orkney?

Method of booking accommodation

- Directly with the accommodation provider: 53%
- Through an online travel agent: 16%
- Through a ‘homestay’ website (e.g. Airbnb): 6%
- Through www.visitscotland.com: 1%
- Through a VisitScotland Information Centre: 1%
- Through a high street or local travel agent: 1%
- Through a tour operator or travel company: 1%
- Other: 4%
- Don't know: 5%
- Didn’t book in advance: 15%

How booked direct with accomm. provider:

- Website: 47%
- Email: 39%
- Telephone: 40%
- Other: 3%

Base (booked direct with accomm. provider): 609

Base (All who stayed in paid accommodation, excluding those who booked accomm. in a package trip): 1,120
Visitor journey
Booking

• Three fifths of Leisure visitors reported booking their accommodation directly with the provider, while one fifth booked via an online travel agent.

• ‘Homestay’ websites were mentioned by 7% of Leisure visitors. These were more likely to be mentioned by under 35 year olds (18%) than any other age group.

• Scotland (73%) and rest of UK Leisure visitors (64%) were more likely to book directly with the accommodation provider than overseas visitors (44%). A higher than average proportion of Leisure visitors from overseas (31%) booked through an online travel agent.

Q29: How did you book your accommodation (e.g. hotel, self-catering, camping, etc.) for your recent trip to Orkney?

Method of booking accommodation
- Leisure visitors

Directly with the accommodation provider 59%
Through an online travel agent 19%
Through a ‘homestay’ website (e.g. Airbnb) 7%
Through www.visitscotland.com 2%
Through a VisitScotland Information Centre 1%
Through a high street or local travel agent 1%
Through a tour operator or travel company 1%
Other 3%
Don’t know 9%
Didn’t book in advance 9%

How booked direct with accomm. provider

Website 50%
Email 43%
Telephone 37%
Other 3%

Base (Leisure booked direct with accomm. provider): 501
Base (Leisure staying in paid accommodation, excluding those who booked accomm. in a package trip): 841
Visitor journey
Booking

- For the vast majority of visitors who did not book a package (85%), their transport to Orkney was booked directly with the transport provider.
- Four out of five bookings with transport providers were done via the website, with only around one fifth by telephone and 8% in person.

Q33: How did you book your travel to Orkney from the Scottish mainland (i.e. ferry or air travel) for your recent trip?

Method of booking transport

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Directly with the transport provider/s</td>
<td>85%</td>
</tr>
<tr>
<td>Online travel agent</td>
<td>3%</td>
</tr>
<tr>
<td>Tour operator/travel company</td>
<td>3%</td>
</tr>
<tr>
<td>Did not arrive from the Scottish mainland</td>
<td>1%</td>
</tr>
<tr>
<td>Local or high street travel agent</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>4%</td>
</tr>
<tr>
<td>Didn't book in advance</td>
<td>3%</td>
</tr>
</tbody>
</table>

How booked direct with transport provider

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>80%</td>
</tr>
<tr>
<td>Telephone</td>
<td>18%</td>
</tr>
<tr>
<td>In person</td>
<td>8%</td>
</tr>
<tr>
<td>Email</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

Base (booked direct with transport provider): 1,049

Base (Excluding those who booked travel in a package trip): 1,214
Visitor journey
Summary

- The key reasons given for visiting Orkney for Leisure visitors were the scenery, the history/culture and the archaeology.
- Half of Leisure visitors also reported that something they had seen or read had also helped inspire their visit – for 29% this was a TV programme.

- Online sources are key information sources for Leisure visitors during the planning and booking process. Visitors tend to use a combination of websites and search engines, most commonly Google, VisitOrkney, VisitScotland and transport providers.
- Many also reported reading traveller reviews on websites such as TripAdvisor to inform planning and booking.

- The majority book their transport and accommodation independently directly with providers, rather than booking packages or using agents.
- Although ‘homestay’ accommodation accounts for a small proportion of all accommodation bookings, almost one fifth of Leisure under 35 year olds booked their accommodation in this way.
Trip profile
As expected, the majority of visitors to Orkney were overnight visitors (89%).

The calibration survey measured day visitors as 10% of all visitors to Orkney. As previously noted, due to sampling difficulties at Burwick Ferry Terminal, the total sample under-represented visitors departing via this route. It is therefore likely that day visitors are slightly under-estimated. It is estimated that the actual number of day visitors is approx. 15% to 16%.

Amongst Business visitors almost one in five were day visitors.

It should also be noted that the survey does not include cruise passengers, the majority of whom are day visitors.

CQ3: Which of the following best describes your current visit to Orkney?

* The true proportion of day visitors is likely to be approx. 15% to 16.

Base (All calibration visitors): 3,418
**Trip profile**

**Number of nights**

- The majority of overnight visitors to Orkney (84%) stayed for a period of one week or less.
- Leisure visitors staying for a week or less were split approximately evenly between those on a short break of 1 to 3 nights (44%) and those staying 4 to 7 nights (44%). The average number of nights was 5.3 nights.
  - Leisure visitors from overseas (64%) tended to spend 3 nights or less; while Scotland (49%) and rest of UK visitors (55%) tend to stay for 4 to 7 nights. A higher proportion of rest of UK Leisure visitors stayed for more than 7 nights (21%) compared to Scotland (11%) and overseas visitors (10%).
- VFR visitors tended to stay slightly longer, with a skew to 4 to 7 nights (45%) or longer (23%). The average number of nights was 7.
- Business visitors predominantly stay for 3 nights or less (67%). There was a proportion, who stayed for a longer period of time for work, with almost 1 in 10 staying for over 2 weeks.

**CQ3a:** How many nights have you spent on The Orkney Isles as part of your trip?

**Number of nights - Orkney**

<table>
<thead>
<tr>
<th>Number of nights</th>
<th>All overnight visitors</th>
<th>Leisure</th>
<th>VFR</th>
<th>Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 to 3</td>
<td>46%</td>
<td>32%</td>
<td>44%</td>
<td>16%</td>
</tr>
<tr>
<td>4 to 7</td>
<td>38%</td>
<td>42%</td>
<td>45%</td>
<td>16%</td>
</tr>
<tr>
<td>8 to 14</td>
<td>11%</td>
<td>11%</td>
<td>8%</td>
<td>16%</td>
</tr>
<tr>
<td>15 - 21</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>More than 21</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Ave number of nights – 6.7

Ave number of nights:  
- Leisure – 5.3  
- VFR – 7.0  
- Business – 10.9

Base (All overnight calibration visitors): Total 3,108, Leisure 1,926; VFR 499; Business 617)
Trip profile
Number of nights

- 62% of overnight visitors reported that they spent nights elsewhere in Scotland on their trip.

- As we would expect, the proportion spending nights in other parts of Scotland was far higher for Leisure visitors (75%) than VFR (38%) or Business (29%) visitors.

- Of those who did spend some time in other parts of Scotland, the average number of additional nights was 9 nights for Leisure visitors and 3 nights for VFR and Business visitors.

Q12: You previously indicated that you were on an overnight visit to Orkney. On your trip, how many nights did you spend away from home in the following locations? - Scotland

Base (All overnight visitors): Total 1,249, Leisure 914; VFR 181; Business 154)
Trip profile
Party composition

The majority of Leisure visitors to Orkney (64%) were travelling with their partner or spouse. It should be noted, however, that 47% in total were only travelling with a partner, with others also mentioning others in their group.

Just over one quarter of visitors (26%) reported that they were travelling with family members, including partners, children, parents and others. Only 8% had children under 16 years old in their group.

A significant proportion of Leisure visitors (18%) reported that they were travelling alone.

Leisure visitors from Scotland (13%) were more likely to have children in their group than those from the rest of the UK (7%) or overseas (5%).

Under 35 year olds were more likely than average to be travelling on their own (30%). Those most likely to be travelling with their children were aged 35 to 44 years (32%).

Q11: Which of the following best describes who was with you on your trip?
Trip profile

Party composition

- Amongst those travelling to Orkney to visit friends and relatives, a far higher proportion were travelling alone (37%) compared to Leisure visitors (18%).

- In total, 49% reported that they were visiting with their partner/spouse, with 36% reporting no other people in their group (i.e. they were travelling as a couple).

- Around one quarter (24%) were visiting with family members, with 14% reporting having children under 16 years old in their group.

Q11: Which of the following best describes who was with you on your trip?
Trip profile
Party composition

• The majority of all visitors to Orkney reported that they were either visiting alone or with one other person.

• However, party size varies considerably by type of visitor. The majority of Business visitors (71%) were visiting alone, while the majority of Leisure visitors were visiting with one other person. VFR visitors also tended to visit with one other person, although over one third were visiting alone.

CQ1: How many people, including yourself, are in your immediate group or party?

Base (All calibration visitors): Total 3,418, Leisure 2,075; VFR 510; Business 760
Trip profile
Areas visited

- Almost all visitors to Orkney reported that they visited Kirkwall during their trip. The majority also mentioned visiting Stromness, West Mainland and East Mainland, with just over one third visiting Burray and South Ronaldsay.

- There were variations in the areas of Orkney visited depending on visitor type. Generally, Leisure visitors tended to visit a wider variety of locations than Business or VFR visitors. Details of areas visited by each visit type are shown over.

Q14: Which of the following areas of Orkney did you visit during your trip?

Areas of Orkney visited - All visitors

- Kirkwall: 97%
- Stromness: 76%
- West Mainland: 68%
- East Mainland: 58%
- Burray/South Ronaldsay: 36%
- Hoy: 18%
- Rousay: 10%
- North Ronaldsay: 10%
- Westray: 9%
- Shapinsay: 5%
- Sanday: 5%
- Stronsay: 4%
- Papa Westray: 4%
- Flotta: 3%
- Egilsay: 2%
- Eday: 2%
- Graemsay: 1%
- Wyre: 1%

Ave. number of nights for those staying overnight in each location (i.e. excluding zero nights):

- Kirkwall – 2.4
- Stromness – 1.5
- West Mainland – 1.8

Base (All): 1,330
Trip profile
Areas visited

- Both Leisure and VFR visitors predominantly visited the mainland locations, including Kirkwall and Stromness.

- However the proportions of visitors visiting each location was generally higher for Leisure visitors than VFR visitors. This is to be expected as Leisure visitors are more likely to tour around Orkney to take in many sites and attractions than VFR visitors, whose main purpose is to visit friends and family living on the islands.

Q14: Which of the following areas of Orkney did you visit during your trip?
Trip profile
Areas visited

- As we would expect, business visitors tend to focus on one or two locations, rather than visiting multiple locations across Orkney.

- Almost all Business visitors reported visiting Kirkwall, while 44% also visited Stromness. Around one fifth reporting going to West Mainland and/or East Mainland.

Q14: Which of the following areas of Orkney did you visit during your trip?

Areas of Orkney visited - Business visitors

- Kirkwall: 94%
- Stromness: 44%
- West Mainland: 21%
- East Mainland: 18%
- Burray/South Ronaldsay: 13%
- Westray: 6%
- North Ronaldsay: 5%
- Stronsay: 5%
- Rousay: 4%
- Sanday: 4%
- Shapinsay: 3%
- Hoy: 2%
- Papa Westray: 2%
- Flotta: 2%
- Eday: 2%
- Wyre: 2%
- Egilsay: 0%
- Graemsay: 0%
Trip Profile

Day trips

• A number of visitors to Orkney (approx. 15%) reported that they were on a day trip from the mainland and did not stay overnight. These visitors were asked if there were visiting on a guided or coach tour.

• The majority of day trippers were travelling independently, with only 15% on a guided or coach tour.

• It should be noted that this proportion is likely to underestimate the true proportion of day visitors on tours to Orkney, as these visitors mostly pass through Burwick Ferry Terminal on a John O’Groats Ferries tour. As previously noted, it was very difficult to include these respondents in our sample due to the impracticality of interviewing at Burwick Ferry Terminal.

Q17: You previously indicated that your recent visit to Orkney was a day trip from the mainland. Was this day trip to Orkney...?
Trip Profile
Previous day trips

- Visitors who were staying overnight on their trip and who had been to Orkney before were asked if their previous visit to Orkney had been a day trip.

- In total, 15% reported that they had ever visited Orkney on a day trip from the mainland. This finding was consistent across Leisure (17%) and VFR (13%) visitors.

- The majority of visitors who had been on day trip to Orkney before had been on a guided tour (40%) or travelled independently (49%). 7% reported that they had previously been on a shore excursion from a cruise ship.

Q18: You previously indicated that your recent visit to Orkney involved an overnight trip. Before this visit, had you ever visited Orkney on a day trip from the mainland (i.e. you only visited Orkney for the day)?
Trip profile

Transport

- The largest proportion of visitors (69%) reported that they had travelled by car during their visit – 49% using their own car and 20% using a hired car.

- Around one tenth of visitors used a bus or coach during their trip, with other forms of transport being mentioned by smaller minorities of visitors.

- Using a privately owned car was more frequently mentioned by VFR visitors (78%) than Leisure (43%) or Business (48%) visitors. Hire cars were more frequently mentioned by Leisure visitors (24%) than VFR (7%) or Business (15%) visitors.

- Taxis were used by 17% of Business visitors.

**Q22:** What was the **main** type of transport you used **during** your visit to Orkney, i.e. whilst on the island/s?

**Main type of transport during visit**

<table>
<thead>
<tr>
<th>Transport Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Car (own/friend’s/firm’s)</td>
<td>49%</td>
</tr>
<tr>
<td>Car (hired)</td>
<td>20%</td>
</tr>
<tr>
<td>Regular bus/coach</td>
<td>9%</td>
</tr>
<tr>
<td>Walked</td>
<td>4%</td>
</tr>
<tr>
<td>Campervan / motorhome</td>
<td>4%</td>
</tr>
<tr>
<td>Taxi</td>
<td>4%</td>
</tr>
<tr>
<td>Organised coach tour</td>
<td>3%</td>
</tr>
<tr>
<td>Ferry between the islands</td>
<td>3%</td>
</tr>
<tr>
<td>Bicycle (own)</td>
<td>1%</td>
</tr>
<tr>
<td>Plane between the islands</td>
<td>1%</td>
</tr>
<tr>
<td>Bicycle (hired)</td>
<td>1%</td>
</tr>
<tr>
<td>Private boat (own/hired)</td>
<td>0%</td>
</tr>
<tr>
<td>Motorcycle</td>
<td>0%</td>
</tr>
<tr>
<td>Hitch-hiked</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

*Base (All, excluding rotational shift workers): 1,295*
Trip profile

Transport

- Cars were the most often used transport for Leisure visitors, including both private cars (43%) and rental cars (24%).
- Visitors from Scotland (73%) and the rest of the UK (51%) were more likely to use their own car than those from overseas (14%).
- 45% of overseas visitors reported using a hire car.
- Younger respondents under 35 years old were less likely than average to travel in a private car (22%), and more likely to travel by bus (24%).

Main type of transport during visit – Leisure visitors

Q22: What was the main type of transport you used during your visit to Orkney, i.e. whilst on the island/s?

- Car (own/friend’s/firm’s): 43%
- Car (hired): 24%
- Regular bus/coach: 11%
- Campervan / motorhome: 5%
- Walked: 4%
- Organised coach tour: 3%
- Ferry between the islands: 3%
- Bicycle (own): 2%
- Taxi: 1%
- Bicycle (hired): 1%
- Motorcycle: 1%
- Plane between the islands: 0%
- Private boat (own/hired): 0%
- Hitch-hiked: 0%
- Other: 1%

Base (All Leisure): 962
Trip profile
Accommodation

• Hotels and self-catering accommodation were the most often used types of accommodation for overnight visitors, followed by B&Bs (19%) and staying with friends/family (14%).

• Hotels were particularly prevalent amongst Business visitors (62%), compared to Leisure (26%) and VFR (9%) visitors.

• Self-catering accommodation was more common amongst Leisure visitors (32%), compared to VFR (18%) and Business (12%) visitors.

• As expected, the majority of VFR visitors were staying with friends or relatives (65%).

Accommodation stayed in during visit – Overnight visitors

- Hotel: 29%
- Self-catering – rented house/cottage/chalet: 26%
- B&B / Guest House: 19%
- Staying with friends/family: 14%
- Hostel: 5%
- “Homestay” e.g. Airbnb: 4%
- Campervan / motorhome at serviced campsite: 3%
- Campervan / motorhome (non-campsite): 2%
- Tent at serviced campsite: 2%
- Workers’ accommodation on-site/rag: 1%
- Second home: 1%
- Tent (non-campsite): 1%
- Touring caravan at serviced campsite: 1%
- Other: 2%

Q24: What type of accommodation did you stay in during this visit to Orkney?

Base (All overnight visitors): 1,249
Trip profile

Accommodation

- Self-catering accommodation was the preferred option for one third of Leisure visitors, while around one quarter stayed in hotels or B&Bs.

- Overseas visitors were the most likely to stay in hotels (32%). Visitors from North America (42%) were more likely to stay in a hotel than those from Europe (24%) or other overseas countries (35%).

- Overseas visitors were also more likely than UK visitors to stay in a B&B or guest house – 33%, compared to 10% of Scotland visitors and 22% of rest of UK.

- Self-catering was more often selected by Scotland (43%) and rest of UK visitors (42%) than overseas visitors (14%).

- Younger respondents aged under 35 years were less likely than average to stay in a hotel (14%) and more likely than average to stay in a ‘homestay’ property (15%), a hostel (15%) or a tent at a campsite (12%).

Q24: What type of accommodation did you stay in during this visit to Orkney?
Trip profile Accommodation

- The majority of visitors to Orkney who were staying in paid for accommodation described their accommodation as ‘mid-market’.

- Of the remainder, there was an almost even split between those staying in luxury (17%) and budget (16%) accommodation.

- These proportions were consistent across all three visitor types.

- Interestingly, higher proportions of Scotland (26%) and rest of UK (19%) Leisure visitors described their accommodations as ‘top end’ than overseas visitors (11%).

- Under 35 year old Leisure visitors were more likely to stay in budget accommodation (32%) than those in older age groups.

Q25: How would you describe the accommodation you stayed in?

Type of accommodation – Overnight in paid for accommodation
Trip profile
Attractions visited

• The main attractions* visited by Leisure visitors were St Magnus Cathedral and Skaill House/Skara Brae/Maeshowe – almost three quarters of visitors reported going to these sites.

• For overseas visitors the top attractions were St Magnus Cathedral (77%), Skaill House/Skara Brae/Maeshowe (77%) and the Italian Chapel (51%). Distilleries were particularly popular with European (35%) and North America (27%) visitors.

• For rest of UK visitors the top attractions were Skaill House/Skara Brae/Maeshowe (76%), St Magnus Cathedral (73%), Italian Chapel (65%) and public museums/heritage centres (60%).

• The attractions most popular with Scotland visitors were St Magnus Cathedral (73%), Skaill House/Skara Brae/Maeshowe (68%), the Italian Chapel (63%) and public museums/heritage centres (58%).

Q55: Which of these visitor attractions in Orkney did you visit on your recent trip?

Visitor attractions on Orkney visited - Leisure visitors

- St Magnus Cathedral 74%
- Skaill House/Skara Brae/Maeshowe 74%
- Italian Chapel 59%
- Public museums/heritage centres 53%
- Bishop’s Palace and/or Earls Palace 43%
- Scapa Flow Visitor Centre 23%
- Orkney ‘Arts and Crafts Trail’ 21%
- Distilleries’ visitor centres 21%
- Pier Arts Centre 19%
- Breweries’ visitor centres 12%
- The Pickaquoy Leisure Centre 8%
- Other historic visitor attractions 64%
- Other visitor centres / attractions 32%
- Other 13%
- None 3%

*Note: Due to an error on the online questionnaire, Ring of Brodgar did not appear on the code list. It is likely that a large proportion of visitors who visited Ring of Brodgar coded it as ‘other historic visitor attraction’ or ‘other’.

Base (All Leisure): 964
Trip profile

Activities

- Respondents were also asked what activities they participated in during their trip to Orkney. The data shown here combines the figures from the chart over to show grouped activities, such as walking (including long and short walks), scenery (beaches, viewpoints, etc.) and shopping (local crafts and other).

- The majority took part in a variety of activities including walking (85%), enjoying scenery (72%), visiting archaeological sites (69%) and sightseeing (65%).

- Visitors from the rest of the UK (54%) were more likely to mention nature activities than those from Scotland (45%) or overseas (44%). Mentions of scenery were higher for Scotland (75%) and rest of UK (77%) than overseas (64%). Archaeological sites were more prevalent for rest of UK (74%) and overseas (70%) visitors than Scotland visitors (61%).

- A more detailed breakdown of activities is shown over.

Q62: Did you take part in any of the following activities during your visit to Orkney?

Top activities on Orkney
- Leisure visitors

- Walking: 85%
- Scenery: 72%
- Archaeological sites: 69%
- Self-guided touring / sightseeing: 65%
- Shopping: 56%
- Trying local food/drinks: 53%
- Nature: 48%
- Photography/painting: 37%

Base (All Leisure): 964
Trip profile
Activities

- Approximately two thirds of Leisure visitors participated in the top four most popular activities – archaeological sites, short walks, beaches/coasts and sightseeing.

- Experiencing local produce was also very prevalent, with 53% trying local food and drinks, and 49% shopping for local crafts/products.

- Almost half of Leisure visitors (48%) also mentioned wildlife, including bird watching, marine wildlife watching and other nature watching.

Top activities on Orkney in detail - Leisure visitors

- Archaeological sites: 69%
- Short walk – up to 2 miles: 68%
- Beaches/coastal scenery: 67%
- Self-guided touring / sightseeing: 65%
- Trying local food/drinks: 53%
- Shopping for local crafts/products: 49%
- Viewpoints/picnic areas: 47%
- Longer walks – over 2 miles: 45%
- Photography/painting: 37%
- Bird watching: 36%
- Nature/wildlife sites: 30%
- Other nature watching (flora/fauna): 28%
- Marine wildlife watching: 26%
- Other shopping: 25%
- Geological sites: 24%
- Guided tours: 21%
- Visiting a distillery: 19%

Q62: Did you take part in any of the following activities during your visit to Orkney?
Trip profile
Activities

• The activities noted on this chart show those selected by smaller numbers of Leisure visitors. These tended to be niche activities, such as music, cycling, knitting and other specific sports.

• Just over one tenth of Leisure visitors mentioned going to a local festival or event. These events included the Orkney Folk Festival, St Magnus International Festival, the Agricultural Show, Stromness Shopping Week, Nature Festival and Sheep Festival, as well as other individual personal events.

Other activities on Orkney
- Leisure visitors

Listening to traditional music 13%
Local festival or events 12%
Visiting a brewery 12%
Musical entertainment/activities 10%
Visits to local leisure centres 8%
Cycling on a road/surfaced path 7%
Knitting/textiles 5%
Swimming 4%
Family history/genealogy research 4%
Other sporting activity 3%
Special event of a personal nature 2%
Diving 2%
Golf 1%
Sea angling 1%
Loch fishing 1%
Surfing, kite surfing, wind surfing 0%
Rock climbing 0%
Kayaking 0%
Sailing 0%
Mountain biking 0%

Q62: Did you take part in any of the following activities during your visit to Orkney?
## Trip profile

### Information

- As well as being the main source of information when planning a trip to Orkney, the Internet was also the main source of information during the trip.

- Visitor centres were also widely utilised, with 42% of all visitors mentioning this as a source of information. As we would expect, Leisure visitors were more likely to use visitor centres (56%) than VFR (18%) or Business (10%) visitors.

- In fact, higher proportions of Leisure visitors used almost all information sources than VFR or Business visitors. A full breakdown of the information sources used by Leisure visitors is detailed over.

- The Apps used included Google maps, VisitScotland, Tripadvisor and BBC Weather.

### Sources of information during trip to Orkney

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet using own device</td>
<td>67%</td>
</tr>
<tr>
<td>Visitor Information Centre</td>
<td>42%</td>
</tr>
<tr>
<td>Asking locals</td>
<td>31%</td>
</tr>
<tr>
<td>Brochure - VisitScotland/Tourist Board</td>
<td>29%</td>
</tr>
<tr>
<td>Locally produced guide books</td>
<td>23%</td>
</tr>
<tr>
<td>Visitor Information Point</td>
<td>23%</td>
</tr>
<tr>
<td>Guide Books</td>
<td>20%</td>
</tr>
<tr>
<td>Local heritage information</td>
<td>17%</td>
</tr>
<tr>
<td>Asking proprietors/service staff</td>
<td>15%</td>
</tr>
<tr>
<td>Local newspaper/newsletter</td>
<td>10%</td>
</tr>
<tr>
<td>Asking other travellers</td>
<td>9%</td>
</tr>
<tr>
<td>Social media</td>
<td>8%</td>
</tr>
<tr>
<td>Tour operator's brochure</td>
<td>5%</td>
</tr>
<tr>
<td>Apps</td>
<td>2%</td>
</tr>
<tr>
<td>None of the above</td>
<td>14%</td>
</tr>
</tbody>
</table>

**Base (All, excluding rotational shift workers): 1,295**

Q64: During your recent visit to Orkney which of the following methods did you use to obtain information about places to visit and things to do?
Trip profile Information

- A wide range of sources of information were accessed by Leisure visitors, with many using more than one.
- Accessing the internet was the most prevalent way of looking for information during their trip for Leisure visitors (76%), followed by going into visitor information centres (56%).
- Higher proportions of rest of UK and overseas visitors used visitor information centres (rest of UK 61%; overseas 56%) than Scotland visitors (47%).
- Those from overseas were more likely to use tour operator’s brochures (overseas 10%; rest of UK 5%; Scotland 3%) and guide books (overseas 35%; rest of UK 24%; Scotland 18%).
- Overseas visitors tended to be less likely to use locally produced information, such as locally produced guide books, local heritage information and local newspapers.

Sources of information during trip to Orkney – Leisure visitors

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet using own device</td>
<td>76%</td>
</tr>
<tr>
<td>Visitor Information Centre</td>
<td>56%</td>
</tr>
<tr>
<td>Brochure - VisitScotland/Tourist Board</td>
<td>38%</td>
</tr>
<tr>
<td>Asking locals</td>
<td>32%</td>
</tr>
<tr>
<td>Visitor Information Point</td>
<td>32%</td>
</tr>
<tr>
<td>Locally produced guide books</td>
<td>30%</td>
</tr>
<tr>
<td>Guide Books</td>
<td>27%</td>
</tr>
<tr>
<td>Local heritage information</td>
<td>21%</td>
</tr>
<tr>
<td>Asking proprietors/service staff</td>
<td>19%</td>
</tr>
<tr>
<td>Local newspaper/newsletter</td>
<td>11%</td>
</tr>
<tr>
<td>Asking other travellers</td>
<td>11%</td>
</tr>
<tr>
<td>Social media</td>
<td>7%</td>
</tr>
<tr>
<td>Tour operator's brochure</td>
<td>7%</td>
</tr>
<tr>
<td>Apps</td>
<td>3%</td>
</tr>
<tr>
<td>None of the above</td>
<td>4%</td>
</tr>
</tbody>
</table>

Q64: During your recent visit to Orkney which of the following methods did you use to obtain information about places to visit and things to do?
## Trip profile

### Information

- The types of information used during the trip have been grouped into net codes here to show key differences between the visitor types.

- Generally Leisure visitors are more likely to use multiple sources, including online/social media/apps (77%), brochures/guidebooks (66%) and visitor information centres (62%).

- Leisure and VFR visitors were equally likely to talk to people to source information. For both groups, this is most likely to be asking local people (Leisure 32%; VFR 40%) rather than proprietors/service staff (Leisure 19%; VFR 5%) or other travellers (Leisure 11%; VFR 6%).

- Amongst Leisure visitors, younger respondents (91% of under 35s) were more likely to use online sources than those in older age groups (66% of over 65s).

### Sources of information during trip to Orkney

<table>
<thead>
<tr>
<th>Sources of Information</th>
<th>Leisure</th>
<th>VFM</th>
<th>Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online/social media/apps</td>
<td>47%</td>
<td>50%</td>
<td>77%</td>
</tr>
<tr>
<td>Brochures and guidebooks</td>
<td>15%</td>
<td>20%</td>
<td>66%</td>
</tr>
<tr>
<td>Visitor info centres</td>
<td>13%</td>
<td>21%</td>
<td>62%</td>
</tr>
<tr>
<td>Talking to people</td>
<td>23%</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>11%</td>
<td>21%</td>
</tr>
<tr>
<td>None of the above</td>
<td>4%</td>
<td>31%</td>
<td>40%</td>
</tr>
</tbody>
</table>

*Base (All, excluding rotational shift workers): Leisure 962; VFR 185; Business 148*

**Q64:** During your recent visit to Orkney which of the following methods did you use to obtain information about places to visit and things to do?
Online / social media activity during or after trip to Orkney

In total, 44% of visitors reported engaging in online or social media activity about their trip to Orkney. This proportion varied by visitor type – 49% of Leisure visitors, compared to 37% of VFR and 29% of Business.

The most often cited activity (30% of visitors) was uploading trip photos to the internet (e.g. to Facebook), while a further 24% reported updating their Facebook status in relation to the trip.

One in seven visitors reported that they had posted an online review. Amongst Leisure visitors the proportion was almost one in five (19%).

Overseas Leisure visitors were them most likely to use social media during or after their trip – particularly those from North America (67% did at least one of the things listed). Specifically, North America visitors were the most likely to upload photos (49%) and/or update Facebook (41%).

Q65: During or after your recent trip to Orkney did you do any of the following?

Base (All, excluding rotational shift workers): Total 1,295; Leisure 962; VFR 185; Business 148
Qualitative Findings
During the trip

The local tourist office and shops were popular information sources for visitors

- The tourist office in Kirkwall gave us enough to travel around the island and keep us busy.
- While we were on the Island we used ordnance survey maps and a guide book we had brought with us.
- We always go to the tourist information office. You can find small local things to do that we wouldn’t have thought of.
- We used our phones and leaflets we got from the B&B.
- We bought some local wildlife and local bird books from the Orcadian newspaper office in Kirkwall.
- We used the VisitScotland website to plan where to go and find things to do.
- The Island is full of information and lovely tools you can carry around with you, without having to depend on technology.
- When Wi-Fi is available, we’ll look online. We use TripAdvisor to look for places to eat.
- We had no real need at all for a smartphone as all the information was readily available either at information centres or through speaking to the local people.
Trip profile

Summary

Leisure visitors
- Approximately 85% were staying overnight – overnight visitors typically stayed for 1 to 3 nights (44%) or 4 to 7 nights (42%).
- Slightly more stayed in self-catering accommodation (32%) than hotels (26%) or B&Bs (23%).
- Travel around the islands was typically by car.
- Almost half were visiting as a couple, with their partner/spouse. Around a quarter were in family groups and one fifth were travelling alone. Just less than 1 in 10 had children under 16 years old in their group.
- The top attractions were St Magnus Cathedral, Skail House/Skara Brae/Maeshowe and the Italian Chapel.
- The top activities were walking, enjoying the beautiful scenery and archaeological sites.
- Most reported finding information online during their trip, although more than half had visited a visitor information centre.

VFR Visitors
- Almost all (97%) were staying overnight – 32% for 1 to 3 nights; 45% for 4 to 7 nights.
- Two thirds stayed with friends or relatives.
- Over one third (37%) were travelling alone; 36% with their partner/spouse and 24% in a family group. 14% reported that they had children in their group.

Business visitors
- Higher proportion of day visitors (19%) than other visitor types. Overnight visitors tended to stay for less than 3 nights (67%).
- Most travel alone (71%) and stayed in a hotel (62%).
- The majority visited Kirkwall (94%), while 44% visited Stromness. Very few visited any other areas on the Orkney Islands.
Evaluation of trip experience
Trip evaluation
Overall experience

• When asked to agree or disagree with a series of statements about their visit to Orkney, the majority of Leisure/VFR visitors provided positive responses.

• The strongest levels of agreement were noted for statements around interactions with local people in Orkney, for example, being made to feel welcome, local people adding to the holiday experience, and customer service. Over 85% of respondents agreed with these statements with the larger proportions agreeing strongly.

• Agreement was weaker for the range of things to do in all weather conditions and in the evenings. However, most respondents did agree with these statements, indicating that generally visitors were satisfied with these aspects of their trip.

Q66: Thinking of your experience in Orkney overall, to what extent do you agree or disagree with the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly disagree</th>
<th>Disagree</th>
<th>Neither nor</th>
<th>Agree</th>
<th>Strongly agree</th>
<th>Mean score</th>
</tr>
</thead>
<tbody>
<tr>
<td>I was made to feel really welcome</td>
<td>3%</td>
<td>28%</td>
<td>68%</td>
<td></td>
<td></td>
<td>4.64</td>
</tr>
<tr>
<td>The local people I met during my visit really added to the holiday experience</td>
<td>10%</td>
<td>36%</td>
<td>53%</td>
<td></td>
<td></td>
<td>4.41</td>
</tr>
<tr>
<td>I experienced excellent customer service</td>
<td>12%</td>
<td>36%</td>
<td>50%</td>
<td></td>
<td></td>
<td>4.37</td>
</tr>
<tr>
<td>There was enough to do in all weather conditions</td>
<td>5%</td>
<td>17%</td>
<td>46%</td>
<td>31%</td>
<td></td>
<td>4.03</td>
</tr>
<tr>
<td>There was enough to do in the evenings</td>
<td>7%</td>
<td>24%</td>
<td>39%</td>
<td>30%</td>
<td></td>
<td>3.92</td>
</tr>
</tbody>
</table>

Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.
Trip evaluation
Overall experience – sub-sample analysis

- European Leisure visitors tended to be less positive than visitors from other locations, with higher proportions agreeing rather than agreeing strongly with the statements. Specifically, European visitors were less likely than other visitors to agree strongly that they were made to feel welcome (51%), the local people really added to the experience (41%), they experienced excellent customer service (33%), there was enough to do in the evenings (17%) and there was enough to do in all weathers (21%).

- North American Leisure visitors, by contrast, tended to be the most positive in their appraisal – higher proportions agreed strongly with the statements, compared to visitors from the UK or other overseas countries. For example, 71% of North American visitors agreed strongly that they experienced excellent customers service - more than twice the proportion of Europeans. Two thirds (66%) also agreed strongly that local people really added to their visit.
Trip evaluation
Overall experience

- Reflecting the positive experience the majority of visitors had on their trip to Orkney, 89% agreed that it is a destination worth visiting more than once (61% agreed strongly).

- Indeed, 72% agreed that there is more to Orkney than they had previously thought before visiting.

- Almost two thirds overall, agreed that their trip had been one of the best holidays or short breaks they had ever taken, with opinion evenly split between those who agreed strongly and agreed.

- Leisure visitors were more likely to strongly agree/agree with this statement (67%) than VFR visitors (54%).

Q66: Thinking of your experience in Orkney overall, to what extent do you agree or disagree with the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly disagree</th>
<th>Disagree</th>
<th>Neither nor</th>
<th>Agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orkney is a destination worth visiting more than once</td>
<td>2%</td>
<td>9%</td>
<td>28%</td>
<td>61%</td>
<td>4.48</td>
</tr>
<tr>
<td>There is more to Orkney than I had previously thought</td>
<td>4%</td>
<td>22%</td>
<td>31%</td>
<td>41%</td>
<td>4.08</td>
</tr>
<tr>
<td>This was one of the best holidays/short breaks I have ever taken</td>
<td>5%</td>
<td>29%</td>
<td>34%</td>
<td>31%</td>
<td>3.88</td>
</tr>
</tbody>
</table>

Base (All Leisure/VFR excluding ‘don’t know’ responses): 1,090 – 1,125

Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.
Trip evaluation
Overall experience – sub-sample analysis

• Whilst overall agreement tended to be similarly high between Leisure visitors from different countries, North American visitors were again the most likely to agree strongly with statements. Indeed, 63% agreed strongly that Orkney is a destination worth visiting more than once; and 56% agreed strongly that there is more to Orkney than previously thought. Overall, 78% agreed that their visit had been one of the best holidays they had ever taken, with 43% agreeing strongly.

• Visitors from Europe again tended to be less likely to agree strongly with statements than those from the UK or other overseas countries. For example, only 42% agreed strongly that Orkney is worth visiting more than once and only 21% agreed strongly that their trip was one of the best holidays/short breaks they had ever taken.

• Female respondents were more likely than males to strongly agree/agree that there is more to the islands than previously thought (50%, compared to 40% of males) and Orkney is worth visiting more than once (67%, compared to 54% of males).
Trip evaluation
Overall experience

- The pattern of response across the Business visitors corresponded closely to the response from Leisure and VFR visitors.

- High levels of agreement were expressed by Business visitors regarding the positive impact of local people on their visit to Orkney.

- Business visitors were also positive about having enough to do in the evenings, although only 24% agreed strongly with this statement.

- The general positive perceptions from Business visitors is also reflected in the fact that 61% agreed that there is more to Orkney than they had previously thought – with 36% agreeing strongly.

Q66: Thinking of your experience in Orkney overall, to what extent do you agree or disagree with the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly disagree</th>
<th>Disagree</th>
<th>Neither nor</th>
<th>Agree</th>
<th>Strongly agree</th>
<th>Mean score</th>
</tr>
</thead>
<tbody>
<tr>
<td>I was made to feel really welcome</td>
<td>8%</td>
<td>29%</td>
<td></td>
<td>63%</td>
<td></td>
<td>4.55</td>
</tr>
<tr>
<td>The local people I met during my visit really added to the experience of visiting the island</td>
<td>9%</td>
<td>39%</td>
<td></td>
<td>51%</td>
<td></td>
<td>4.39</td>
</tr>
<tr>
<td>I experienced excellent customer service</td>
<td>3%</td>
<td>16%</td>
<td>36%</td>
<td>45%</td>
<td></td>
<td>4.23</td>
</tr>
<tr>
<td>There is more to Orkney than I had previously thought</td>
<td>2%</td>
<td>7%</td>
<td>30%</td>
<td>25%</td>
<td>36%</td>
<td>3.84</td>
</tr>
<tr>
<td>There was enough to do in the evenings</td>
<td>2%</td>
<td>6%</td>
<td>29%</td>
<td>40%</td>
<td>24%</td>
<td>3.79</td>
</tr>
</tbody>
</table>

Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.

Base (All Business excluding rotational shift workers and ‘don’t know’): 113 - 148
Trip evaluation
Environment

• The majority of visitors shared a perception that Orkney is an environmentally responsible destination.

• Over 90% of visitors agreed that Orkney takes care of its natural environment, with 57% agreeing strongly. This perception was consistent across Leisure, VFR and Business visitors.

• 88% of visitors also agreed that they themselves were encouraged to behave in an environmentally responsible way. Agreement for this statement was higher amongst Leisure (71%) and VFR (70%) visitors than for Business visitors (51%).

• Leisure visitors from North America were more likely to agree strongly with these statements than those from the UK, Europe or other countries.

Q66: Thinking of your experience in Orkney overall, to what extent do you agree or disagree with the following statements?

Agreement with statements about experience on Orkney - Environment

Orkney is a destination which takes care of its natural environment

- Strongly disagree: 7%
- Disagree: 35%
- Neither nor: 57%

Mean score: 4.47

I was encouraged to behave in an environmentally responsible way

- Strongly disagree: 4%
- Disagree: 28%
- Neither nor: 33%
- Agree: 35%

Mean score: 3.98

Base (All excluding rotational shift workers and ‘don’t know): 1,227 – 1,248

Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.
### Trip evaluation

**Digital coverage**

- Visitors were generally satisfied with the availability of free Wi-Fi on Orkney, with an overall mean score of 6.51 out of 10. However, the findings suggest room for improvement, with 35% scoring 5 or less.

- Similarly, the largest proportion gave a score of more than 5 out of 10 for mobile phone signal coverage (mean score 6.15). However, 40% scored phone signal coverage with 5 or less, again suggesting scope for improvement.

- The area of greatest concern was the availability of 3G/4G on the islands. Opinion was almost evenly split on this aspect, with 51% scoring more than 5 out of 10 and 49% scoring 5 or less.

- Visitors from North America tended to be slightly more satisfied with digital coverage than those from elsewhere.

#### Q67: How satisfied were you with the following whilst in Orkney?

<table>
<thead>
<tr>
<th>Availability of free Wi-Fi</th>
<th>Very satisfied</th>
<th>Very dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean score</td>
<td>6.51</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Availability of 3G / 4G</th>
<th>Very satisfied</th>
<th>Very dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean score</td>
<td>5.60</td>
<td></td>
</tr>
</tbody>
</table>

Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.
Trip evaluation

Accommodation

- In general, visitors were satisfied with the quality, value for money and service received at their accommodation. In particular, the majority (64%) gave a score of 9 or 10 out of 10 for a friendly and efficient service.

- There was some minority concern (1 in 10 visitors) about the quality and value for money of accommodation.

- Satisfaction tended to be higher for Leisure and VFR visitors than for Business visitors.

- Leisure visitors from Europe were less likely to give 10 out of 10 scores than those from the UK or other countries.

Satisfaction with accommodation

Q68: Thinking about the accommodation you stayed in, how satisfied were you with the following aspects of your accommodation?

Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

Base (All staying in paid accommodation excluding ‘don’t know’): 914 - 938
Trip evaluation
Satisfaction with aspects of trip

• The majority of visitors were satisfied with all aspects of their trip to Orkney. All of the aspects listed opposite attracted mean scores of over 8 out of 10 in terms of satisfaction.

• The highest scoring element was the quality of visitor attractions, historic sites, museums, etc. – 65% of visitors scored this with 9 or 10 out of 10. These attractions were also thought to offer good value for money.

• The quality of local food/drink and arts/crafts products were also highly regarded by most visitors – more than half gave top scores of 9 or 10.

• Information provision locally was also praised, with a mean score of 8.32 across the sample.

---

### Satisfaction with key aspects of trip

**Q69: How satisfied were you with the following aspects of your visit?**

Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Dissatisfied</th>
<th>Very satisfied</th>
<th>Mean score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of visitor attractions, historic sites, museums, visitor centres, etc.</td>
<td>3% 10% 20% 27% 38%</td>
<td></td>
<td>8.77</td>
</tr>
<tr>
<td>Quality of local food/drink products*</td>
<td>3% 5% 12% 24% 26% 27%</td>
<td></td>
<td>8.35</td>
</tr>
<tr>
<td>Value for money of visitor attractions, historic sites, museums, visitor centres, etc.</td>
<td>7% 5% 12% 22% 24% 29%</td>
<td></td>
<td>8.34</td>
</tr>
<tr>
<td>Availability of information locally about places you could visit during your trip</td>
<td>6% 6% 15% 24% 21% 29%</td>
<td></td>
<td>8.32</td>
</tr>
<tr>
<td>Quality of local arts and crafts products</td>
<td>8% 7% 11% 20% 24% 29%</td>
<td></td>
<td>8.29</td>
</tr>
</tbody>
</table>

*Includes business visitors.

Base (All, excluding ‘don’t know’): 616 – 1,175
Trip evaluation
Satisfaction with aspects of trip

- The aspects detailed here attracted slightly lower scores than the previous chart, however, the assessment of each remains very positive – all score more than 7 out of 10 on average.

- One of the lowest scores was for opportunities to attend local events and festivals – although this opportunity would clearly be limited by whether any events were on at the time of the visit.

- The value for money of dining out was also scored slightly lower compared to some other aspects, suggesting that, for some, eating out was expensive.

Q69: How satisfied were you with the following aspects of your visit?

Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

*Includes business visitors.

Base (All, excluding ‘don’t know’): 616 – 1,175
Trip evaluation
Satisfaction with aspects of trip – sub-sample analysis

- Amongst Leisure visitors, those from North America tended to provide the highest scores, whilst those from Europe or other overseas countries tended to provide lower scores – although the majority were satisfied.

- Female respondents tended to state slightly higher levels of satisfaction than males. For example, 81% of females gave a score of 7 to 10 for the quality of local arts and crafts products, compared to 67% of males. Similarly, 70% of females scored 7 or more for the value for money of local arts and crafts, compared to 57% of males.

- The oldest age group (over 65 year olds) were more likely to provide positive ratings than the youngest age group (under 35 year olds) for certain elements of the trip. For example, fewer younger respondents scored value for money when dining out with 8 or more (43%), compared to over 65s (59%).
Trip evaluation

Recommendation

- The positive attitudes of Leisure and VFR visitors is confirmed in the finding that the majority would recommend Orkney as a holiday or short break destination. Indeed, 62% gave a perfect 10 out of 10 promotion score.

- Findings were similarly positive for both Leisure and VFR visitors, however, VFR visitors were more likely to provide a score of 10 (71%, compared to 61% of Leisure visitors).

- For Leisure visitors, those most likely to score 10 out of 10 were visitors from Scotland (74%) followed by those from the rest of the UK (63%) and finally overseas (49%). However, visitors from North America were significantly more likely to score 10 (71%) than those from Europe (37%) or other overseas countries (47%).

- Females were more likely to score 10 (66%) than males (56%). People aged under 35 were less likely to score 10 (46%) than those aged 35 or older (62%).

Q70: Based on your experiences during this trip, how likely are you to recommend Orkney as a holiday or short break destination to friends and family?

Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

Likelihood to recommend Orkney as a holiday or short break destination – Leisure and VFR visitors

Mean score (Total): 9.22
Mean score (Leisure): 9.21; Mean score (VFR): 9.29

1% unlikely
99% likely

1% unlikely
2%
5%
14%
15%
62%

10 - very likely

Base (All Leisure/ VFR, excluding ‘don’t know’): 1,148
Trip evaluation
Return visit

• When asked how likely they were to return to Orkney for a short break or holiday in the next 5 years, the majority of visitors responded positively - 86% scored 6 or more out of 10, with 46% scoring 10 out of 10 indicating that it is highly likely.

• Findings did vary by visitor type. As expected VFR visitors were the most likely to anticipate a return visit (76% 10 out of 10). A large proportion of Business visitors also considered it likely – 79% scored 6 or more and 43% scored 10.

• Given the mix of domestic and international visitors within the Leisure sample it is not surprising that propensity to return is slightly lower. However, this group was also strongly weighted to an intention to return, as noted in the data detailed over.

Q71: Based on your experiences during this trip, how likely are you to visit Orkney in the next five years for a leisure holiday or short break?

Likelihood to visit Orkney on holiday or short break in next 5 years

Mean score (Total): 7.93
Leisure: 7.57; VFR: 9.26; Business 8.08

Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.
Likelihood to visit Orkney on holiday or short break in next 5 years – Leisure visitors

- 79% of Leisure visitors gave a score of 6 or more in terms of their likelihood to return to Orkney in the next five years.

- As we would expect, visitors from Scotland (61%) and the rest of the UK (43%) were more likely to score 10 out of 10 than those from overseas (21%).

- Younger respondents (aged under 35 years old) were less likely to provide a score of 10 (29%) than those aged 35 years or older (41%).

Q71: Based on your experiences during this trip, how likely are you to visit Orkney in the next five years for a leisure holiday or short break?

Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

Base (All Leisure excluding ‘don’t know’): 916
Trip evaluation
Highlight

• When asked about the highlight of their trip specific places such as Skara Brae and Hoy were mentioned, as well the attractions in general.

• This was followed by the history and the archaeology of Orkney.

• Around a fifth also mentioned the landscape and scenery. These visitors were very taken by the scenic, unspoilt views particularly those who were not used to rural locations.

• Just over 1 in 10 also mentioned the local islanders. Some mentioned that their host/hostess at their accommodation made the trip special.

Q73 - What was the highlight of your visit to Orkney or the single thing that you enjoyed or appreciated most?

Highlight of the visit (open-ended) – Leisure & VFR

<table>
<thead>
<tr>
<th>Highlights - Open ended question grouped</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attraction / specific places e.g. Skara Brae, Hoy, etc.</td>
<td>42%</td>
</tr>
<tr>
<td>History / archaeology</td>
<td>36%</td>
</tr>
<tr>
<td>Scenery / beauty / landscape / views</td>
<td>21%</td>
</tr>
<tr>
<td>Nice people / locals / community / Host(ess)</td>
<td>13%</td>
</tr>
<tr>
<td>Walks</td>
<td>7%</td>
</tr>
<tr>
<td>Wildlife</td>
<td>7%</td>
</tr>
<tr>
<td>Peace / quiet / relaxation</td>
<td>7%</td>
</tr>
<tr>
<td>Visiting family / friends</td>
<td>6%</td>
</tr>
<tr>
<td>Event e.g. Folk Festival</td>
<td>4%</td>
</tr>
<tr>
<td>Good weather</td>
<td>4%</td>
</tr>
<tr>
<td>Beaches</td>
<td>4%</td>
</tr>
<tr>
<td>Food</td>
<td>3%</td>
</tr>
<tr>
<td>Ferry trip</td>
<td>2%</td>
</tr>
<tr>
<td>Cycling / Kayaking / Swimming / Scuba diving / diving at Scapa Flow</td>
<td>2%</td>
</tr>
<tr>
<td>Fresh air</td>
<td>1%</td>
</tr>
<tr>
<td>Plane trip</td>
<td>1%</td>
</tr>
<tr>
<td>Fishing</td>
<td>1%</td>
</tr>
<tr>
<td>Good roads, transport</td>
<td>1%</td>
</tr>
<tr>
<td>Cleanliness</td>
<td>1%</td>
</tr>
<tr>
<td>Visiting home town/Island, finding information on family / ancestors</td>
<td>1%</td>
</tr>
<tr>
<td>Other: experience as a whole, local beer, general enjoyment, everything</td>
<td>7%</td>
</tr>
</tbody>
</table>
Trip evaluation Highlight

- Over half of the business visitors said that it was the local community and people that they appreciated the most.
- This was closely followed by the views and scenery.
- A few mentioned other aspects that were a trip highlight, such as restaurants and food, and the peace and quiet.

Highlight of the trip (open-ended) – Business visitors

<table>
<thead>
<tr>
<th>Highlights - Open ended question grouped</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nice people / locals / community</td>
<td>52%</td>
</tr>
<tr>
<td>Scenery / beauty / landscape / views</td>
<td>43%</td>
</tr>
<tr>
<td>Food / restaurants</td>
<td>11%</td>
</tr>
<tr>
<td>Attraction / specific places</td>
<td>11%</td>
</tr>
<tr>
<td>Peace / quiet / relaxation</td>
<td>9%</td>
</tr>
<tr>
<td>Wildlife</td>
<td>6%</td>
</tr>
<tr>
<td>Doing business</td>
<td>6%</td>
</tr>
<tr>
<td>Hotel staff</td>
<td>4%</td>
</tr>
<tr>
<td>History / archaeology</td>
<td>4%</td>
</tr>
<tr>
<td>Out of scope - negative comments</td>
<td>4%</td>
</tr>
<tr>
<td>Good weather</td>
<td>3%</td>
</tr>
<tr>
<td>Good roads</td>
<td>2%</td>
</tr>
<tr>
<td>Exciting weather</td>
<td>1%</td>
</tr>
<tr>
<td>Friends / Family / Home</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q74 - What did you enjoy most about your business trip?
Trip evaluation
Improvements

- When asked about suggested improvements 59% gave a response.

- Of those who responded, almost one fifth suggested improvements related to transport or travel. These comments included:
  - Better transport links between islands
  - More regular ferries to the island
  - Cheaper public transport
  - More regular public transport to get around the island

- Other suggested improvements included more restaurants and better food options, specifically:
  - Local produce
  - Better quality food
  - More choice

- In total, 13% mentioned an improvement relating to internet availability or mobile phone coverage.

Q75 - What one improvement would have enhanced your visit to Orkney?

<table>
<thead>
<tr>
<th>Suggested improvements - Open ended question grouped</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel improvements</td>
<td>18%</td>
</tr>
<tr>
<td>More restaurants / pubs / food / drink options / local food</td>
<td>15%</td>
</tr>
<tr>
<td>Better Internet / mobile phone coverage</td>
<td>13%</td>
</tr>
<tr>
<td>Better / more road signs</td>
<td>12%</td>
</tr>
<tr>
<td>More information on transport / sites / attractions</td>
<td>10%</td>
</tr>
<tr>
<td>Infrastructure / parking / roads</td>
<td>6%</td>
</tr>
<tr>
<td>Too busy / tourists / cruise ships</td>
<td>6%</td>
</tr>
<tr>
<td>Opening hours / Sunday opening</td>
<td>5%</td>
</tr>
<tr>
<td>Accommodation quality</td>
<td>4%</td>
</tr>
<tr>
<td>More touring options / things to do / more evening entertainment / leisure options</td>
<td>4%</td>
</tr>
<tr>
<td>Flight / ferry prices</td>
<td>4%</td>
</tr>
<tr>
<td>People</td>
<td>4%</td>
</tr>
<tr>
<td>Weather</td>
<td>3%</td>
</tr>
<tr>
<td>Town centre / more shops etc.</td>
<td>3%</td>
</tr>
<tr>
<td>Environmental concerns</td>
<td>3%</td>
</tr>
<tr>
<td>Access / attractions not being open at all</td>
<td>2%</td>
</tr>
<tr>
<td>Bins and litter</td>
<td>2%</td>
</tr>
<tr>
<td>Lack of public toilets</td>
<td>2%</td>
</tr>
<tr>
<td>Accommodation prices</td>
<td>1%</td>
</tr>
<tr>
<td>Other individual comments</td>
<td>2%</td>
</tr>
<tr>
<td>Nothing</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base (All who gave a response, excluding rotational shift workers): 767
Qualitative Findings
Improvements

The key improvements from qual respondents ...

None of the self-catering accommodation in Orkney accepted dogs. It’s much easier in Devon and Cornwall to find nice accommodation that you take your dog to.

Some information about where you might spot sea eagles. I would love to have seen one but didn’t.

Make more of the Stromness museum. It has a large collection it just needs better organised.

It is difficult to get to the other smaller islands. You need to provide more opportunities for people to disperse further.

There were very few restaurants. More cafes and restaurants would be good.
Almost one quarter of respondents (24%) made a comment when asked to state if anything had negatively impacted their experience.

Similar to the suggested improvements transport was one of the main aspects that impacted negatively on visitors’ experiences, for example:
- Delayed flights/ferries
- Lack of regular flights
- Lack of bus service / poor Sunday bus service
- Poor linkage of public transport with ferry and flight times

Other issues included cruise ship passengers causing too much over-crowding at attractions
- Concerns over sites being overwhelmed/damaged by large crowds of tourists
- Having to rearrange plans to avoid the cruise ship visitors

Q76 - Was there anything you encountered during your visit that impacted negatively on your visitor experience?
Qualitative Findings
Negative Experience

There was some feedback from qual respondents about issues had a negative impact.

We got pretty savvy at avoiding the large tours. They might put people off in the future ... it’s difficult to see much if you are somewhere at the same time as a tour.

It was a completely different experience when there was a cruise ship in Kirkwall... I can see how that could be annoying to some people. There were three coach loads at the standing stones.
The positive opinions of visitors to Orkney were confirmed when they were asked to rate their overall satisfaction with their trip to Orkney. In total, 95% reported being satisfied, with 79% stating that they were ‘very satisfied’.

This high level of satisfaction was reflected across all visitor types, however, Leisure visitors had the highest proportion of ‘very satisfied’ responses, as detailed over.

Overall, how satisfied were with your trip to Orkney?

Mean score: 4.71

Mean score calculated, whereby 1 is extremely dissatisfied and 5 is extremely satisfied.
Trip evaluation
Overall satisfaction

- Leisure visitors were the most likely to state that they were ‘very satisfied’ with their trip, while Business visitors were more likely than others to state ‘quite satisfied’.

- However, all three visitor groups expressed similarly high levels of overall satisfaction.

- The high levels of overall satisfaction were generally consistent across country of origin for Leisure visitors. Visitors from Europe, however, were less likely than average to state that they were very satisfied (71%).

- The younger age group of under 35s were less likely to report being very satisfied overall (74%) than those aged over 65 years old (89%).

Overall, how satisfied were with your trip to Orkney?

Mean scores: Leisure 4.78; VFR 4.67; Business 4.49

Q72: Overall how satisfied were you with your visit to Orkney?

Mean score calculated, whereby 1 is extremely dissatisfied and 5 is extremely satisfied.
The qualitative respondents were also very positive about their experience.

Orkney people are amazing, we couldn’t fault them at all. Any issues we had with vandalism (talking about a stolen street sign for the Village of Twatt and a stolen torch from a burial chamber) was down to tourists.

Very good information given on the different sites.

You genuinely felt like one of the locals, they could not do enough to help you.

Ideal for people with older children who enjoy walking and the outdoors. It has a quiet pace of life and it’s not overdeveloped.

I can’t recommend it enough. I speak glowingly about it to friends and tell them all to add to their bucket list!!

It was an excellent family holiday – something for everyone. The dog enjoyed Ring of Brodgar!

It was brilliant, just spectacular, really. We thought we knew what to expect and, yes, it was what we expected, but also so much more!
Trip evaluation
Summary

• Satisfaction with the experience of visiting Orkney was very high.
  - 65% agreed it was one of the best holidays they had ever taken
  - 79% were ‘very satisfied’ overall
  - 77% scored 9 or 10 in terms of their likelihood to recommend Orkney as a place to visit

• 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.

• Although the majority were first time visitors to the islands, many expressed an intention to make a return visit to Orkney – 62% of Leisure visitors provided a score of 8 or more out of 10 for intention to revisit in the next 5 years; and 61% of Leisure/VFR visitors agreed strongly that Orkney is a destination worth visiting more than once.

• The main area of minority concern was digital coverage, including availability of free Wi-Fi, mobile phone signal coverage and availability of 3G/4G.

• Open-ended analysis also suggests that some visitors experienced difficulties with transport and would like to see a wider selection of restaurants and cafes. There were also some mentions of overcrowding due to the number of cruise ship passengers at key sites.
Volume and value
Volume and value
Visit numbers

- Total departing passenger numbers for 2017 were provided by travel operators and Orkney Islands Council.

- These figures were used to calculate the total number of visits* to Orkney based on the proportion of visitors (versus islanders) measured by the calibration survey – 64%.

- The total number of visits to Orkney in 2017 was 174,273.

- Proportions for Leisure, VFR and Business visits measured by calibration survey were also applied to calculate the number of visits in each of these categories.

*Figures are shown for the number of ‘visits’ to the islands, rather than the number of ‘visitors’. This is because some visitors may make more than one trip over the course of the year. This means that we cannot estimate the number of discrete visitors but can provide estimated data on the number of visits.
Volume and value
Provision of spend data

• In total, 71% of respondents to the online survey were able to provide spend data on their trip. All subsequent spend questions and overall value calculations are based on the data provided by these respondents.

• Approximately half of respondents provided individual spend figures and half provided group spend. All group spend data was divided by the number of people in the group to give ‘spend per person’.

Are you able to provide approximate spend for different elements of your trip?

Q40: Firstly, is it easier for you to provide your own individual spend for the trip or the total spend for your group?

- Yes 71%
- No 29%

Average number group spend covers 4.7

Base (All): 1,330
Volume and value
Average spend

- The data tabulated opposite shows the total average spend per person for their trip, as well as the overall average spend in each spend category. These averages are based on the total sample who provided spend data and therefore provide an indication of the average spend across all visitors.

- The highest category of spend was accommodation (£106.01), followed by travel from the Scottish mainland (£88.63).

- The overall average spend per person was £439.09. This figure includes travel expenditure to get to Orkney and full package costs, and does not therefore give the total spend per person on the Orkney Islands. This data is detailed over.

### Average total spend for trip – all visitors

<table>
<thead>
<tr>
<th>Total average spend per person - £439.09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation (incl. food and drink)</td>
</tr>
<tr>
<td>Travel to Orkney from Scottish mainland</td>
</tr>
<tr>
<td>Food and drink not at accommodation</td>
</tr>
<tr>
<td>Travel costs on Orkney</td>
</tr>
<tr>
<td>Travel to Orkney from outside Scotland</td>
</tr>
<tr>
<td>Shopping for gifts, etc.</td>
</tr>
<tr>
<td>Package</td>
</tr>
<tr>
<td>Entertainment and recreation</td>
</tr>
<tr>
<td>Other shopping</td>
</tr>
<tr>
<td>Other spend</td>
</tr>
</tbody>
</table>

Base (All who provided spend data): 958
Volume and value
Average spend

- The total average spend per person on the Orkney Islands was £291.52.

- This figure excludes travel to the Orkney Islands from the Scottish mainland or from outside Scotland. The cost of a package holiday has also been adjusted to reflect estimated spend accruing to businesses on Orkney.

- Visitors from the rest of the UK had a higher average spend (£335.90) than those from Scotland (£270.36) or overseas (£275.99).

- Leisure visitors tended to spend more on their trip than VFR and Business visitors. The average trip spend by visitor type is detailed over.

### Average spend on Orkney Islands – all visitors

<table>
<thead>
<tr>
<th>Category</th>
<th>Average Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation (incl. food and drink)</td>
<td>£106.01</td>
</tr>
<tr>
<td>Food and drink not at accommodation</td>
<td>£56.09</td>
</tr>
<tr>
<td>Travel costs on Orkney</td>
<td>£51.97</td>
</tr>
<tr>
<td>Shopping for gifts, etc.</td>
<td>£34.20</td>
</tr>
<tr>
<td>Entertainment and recreation</td>
<td>£18.43</td>
</tr>
<tr>
<td>Other shopping</td>
<td>£10.74</td>
</tr>
<tr>
<td>Package</td>
<td>£9.03</td>
</tr>
<tr>
<td>Other spend</td>
<td>£5.05</td>
</tr>
</tbody>
</table>

Total average spend per person on Orkney Islands - £291.52

Base (All who provided spend data): 958
Volume and value

Average spend

- Leisure visitors had the highest average spend per person per trip at £324.85.

- The spend for VFR and Business visitors was very similar – VFR £207.84; Business £204.17.

- The average spend for a Leisure overnight visitor was £339.32.

Average spend on Orkney Islands – by visitor type

Q47/48: How much did you/you and your immediate party/group spend on the following items in total during your stay on Orkney?

Base (All who provided spend data): Total 958; Leisure 740; VFR 121; Business 97
Volume and value

Total value

• Average spend figures have been applied to visitor volume in order to calculate the total value of visitors to Orkney in 2017.

• The total value of visitor spend on the Orkney Islands in 2017 was approximately £50 million.

• The largest proportion of this spend came from Leisure visitors - £37.4 million.

<table>
<thead>
<tr>
<th></th>
<th>Number of visitors</th>
<th>Average spend</th>
<th>Total Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure</td>
<td>115,020</td>
<td>£324.85</td>
<td>£37,364,366</td>
</tr>
<tr>
<td>VFR</td>
<td>26,141</td>
<td>£207.84</td>
<td>£5,433,144</td>
</tr>
<tr>
<td>Business</td>
<td>33,112</td>
<td>£204.17</td>
<td>£6,760,477</td>
</tr>
<tr>
<td>Total</td>
<td>174,273</td>
<td></td>
<td>£49,557,987</td>
</tr>
</tbody>
</table>

Base (All who provided spend data): Total 958; Leisure 740; VFR 121; Business 97
Volume and value

Total value

- The spend figures for Leisure visitors have been split by country of origin to calculate the total value of each visitor type.
- Visitors from the rest of the UK tend to have the highest average spend per person (£359.32), while those from Overseas tend to spend somewhat less (£278.70).
- Amongst Leisure visitors, those from the rest of the UK and overseas contribute a very similar value to the islands – both groups have a total spend of just over £13 million.
- Leisure visitors from Scotland contributed approximately £10.8 million to the Orkney economy in 2017.

### Total spend by Leisure visitors on Orkney in 2017

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of visitors</th>
<th>Average spend</th>
<th>Total Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>31,055</td>
<td>£347.31</td>
<td>£10,785,885</td>
</tr>
<tr>
<td>Rest of UK</td>
<td>36,807</td>
<td>£359.32</td>
<td>£13,225,318</td>
</tr>
<tr>
<td>Overseas</td>
<td>47,158</td>
<td>£278.70</td>
<td>£13,143,032</td>
</tr>
<tr>
<td><strong>Total Leisure</strong></td>
<td><strong>115,020</strong></td>
<td><strong>£324.85</strong></td>
<td><strong>£37,364,366</strong></td>
</tr>
</tbody>
</table>

Base (All who provided spend data): Total Leisure 740; Scotland 191; rest of UK 291; overseas 258

*Total spend figures by origin do not add exactly to total Leisure spend. This is due to rounding and weighting.*
**Volume and value**

**Spend categories**

- The majority of visitors spent across a range of categories, including travel, food and drink, accommodation, entertainment and shopping.

- As we would expect, the highest proportions of visitors spent on food and drink and travel to Orkney.

- Leisure visitors were more likely to incur accommodation costs (83%) than Business (65%) or VFR (56%) visitors.

- Leisure visitors were also more likely to mention spend on entertainment/recreation (79%) than Business (15%) or VFR (47%) visitors.

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**Proportions providing spend data in each category – all visitors**

- Food and drink not at accommodation: 93%
- Travel to Orkney from Scottish mainland: 88%
- Travel costs on Orkney: 78%
- Accommodation (incl. food and drink): 77%
- Entertainment and recreation: 66%
- Shopping for gifts, etc.: 65%
- Other shopping: 34%
- Other spend: 25%
- Travel to Orkney from outside Scotland: 20%

**Q47/48:** How much did you / you and your immediate party/group spend on the following items in total during your stay on Orkney?

**Base (All able to provide spend in each category): 188 - 864**
Volume and value

Average spend

- In order to show a more accurate value for how much people spent in each category, the figures opposite are only based on those respondents who provided spend figures in each category, i.e. the averages exclude zeros.

- Therefore, for people who travelled directly to Orkney from a location outside of Scotland (e.g. Bergen) the average cost of travel was £189.31. Travel from the Scottish mainland costs around £100 per person on average.

- The average cost of accommodation for people staying in paid for accommodations was £138.04, whilst the additional costs of food and drink on the trip averaged £60.27 for those who incurred these costs.

- Of those who purchased gifts and souvenirs, the average amount spent on the trip was £47.10 per person.

Average spend in each category – only those spending in each category

- Travel to Orkney from outside Scotland: £189.31
- Accommodation (incl. food and drink): £138.04
- Travel to Orkney from Scottish mainland: £100.90
- Travel costs on Orkney: £66.40
- Food and drink not at accommodation: £60.27
- Shopping for gifts, etc.: £47.10
- Other shopping: £31.30
- Entertainment and recreation: £28.04
- Other spend: £20.07

Q47/48: How much did you/you and your immediate party/group spend on the following items in total during your stay on Orkney?
Volume and value
Visitors on a package

• 7% of Leisure visitors booked their trip as a package.

• Of those able to provide trip spend, 61% reported that their package included only time spent in Orkney, while 39% reported that it included nights elsewhere.

• The value of the package which was estimated to accrue to businesses on Orkney was calculated on the basis of:
  - Proportion of total length of trip spent on Orkney
  - Proportionate amount of time spent on Orkney divided by 2.

• The assumption that approximately half of the package spend will accrue to Orkney businesses is used to provide consistency with previous value calculations in 2013, 2009 and 2005.

Average cost of a package trip
- Leisure visitors

Q44: What was the cost of your/group’s package/inclusive holiday?

£623.92

£188.45

Total package cost
Proportion of Package cost on Orkney

Base (All Leisure visitors on a package who were able to provide spend): 53
Comparisons to previous research
Comparisons to previous research

Notes on analysis

- Due to changes in method and question wording, there is limited scope for comparisons between 2017 and data gathered in previous waves of research – 2013, 2009 and 2005.

- Key differences between the surveys are noted in this section. It is important to note, however, that some data which was collected via the online survey in 2017 was collected via face-to-face surveys previously. The different methods of data collection can have an impact on findings, particularly for spontaneous questions.

- Furthermore, some questions were asked differently in previous years, or had different lists of response codes. Again these changes can impact on findings. In particular, the rating scales used to measure satisfaction with aspects of the visit, visit experience, likelihood to return and likelihood to recommend were different in 2017. This means that direct comparisons of these questions to 2013 is not possible.
Comparisons to previous research

Profile of visitors

All visitors:
• A higher proportion of visitors in 2017 were Leisure visitors (65%) than in 2013 (57%); however, the proportion is similar to 2009 (67%). There was a higher proportion of Business visitors in 2013 (25%), compared to 2017 (19%).
• There were slightly more male visitors in 2017 (61%) than in 2013 (55%) or 2009 (49%).
• The age profile of all visitors was similar in 2017 to previous years.
• The profile by country of origin was also very similar between 2013 and 2017, with no significant differences in the proportions visiting from Scotland, the rest of the UK and overseas.
• The proportion of first time visitors to Orkney in 2017 (51%) was closely aligned to previous years (2013 49%; 2009 54%).

Leisure visitors:
• In 2017 there were more male Leisure visitors (58%), compared to 2013 (50%).
• The age profile of Leisure visitors was very similar to previous years.
• There was a higher proportion of ‘other overseas’ (excluding Europe) visitors in 2017 (21%) than in 2013 (15%).
Comparisons to previous research
Visitor journey, trip profile, overall satisfaction

• The length of time in advance that visitors planned and booked their trip to Orkney was closely matched in 2017 to the data gathered in 2013.
• In terms of sources of information used during the planning process, Leisure visitors were less likely to report using printed materials in 2017, such as brochures (2013 46%; 2017 14%) and guidebooks (2013 45%; 2017 28%).
• There were also slightly fewer Leisure visitors using these printed materials during their visit to Orkney - brochures (2013 47%; 2017 38%) and guidebooks (2013 34%; 2017 27%). Visits to Visitor Information Centres (2013 47%; 2017 56%) and Visitor Information Points (2013 24%; 2017 32%) have increased since the last survey.
• Visitors were equally likely to upload photos of their trip and update their Facebook status in 2017 as they had been in 2013.
• The profile of transport used as the main type during their visit to Orkney was very similar in 2017 to 2013.
• The proportions of Leisure visitors staying in B&Bs and hotels was consistent between 2013 and 2017. However, a higher proportion stayed in self-catering accommodation in 2017 (2013 24%; 2017 32%).
• Slightly fewer respondents stated that they were ‘very satisfied’ with their visit to Orkney in 2017 (79%) compared to 2013 (87%). It is important to note, however, that this question was asked as part of the face-to-face survey in 2013 and in the online survey in 2017. Respondents are more likely to provide a positive response when asked this type of question face-to-face when still on the islands.
Comparisons to previous research
Volume and value

• The data provided by travel operators and Orkney Islands Council for passenger numbers in 2017 indicate that there has been a significant increase in the number of visitors since 2013. The total visitors estimated in 2013 was 142,816, compared to 174,273 in 2017 – an increase of 22%. This increase was found across both ferry and air travel routes.

• The average spend per person per trip on Orkney also increased between 2013 and 2017. In 2013 visitors spent £218 on average on their trip, whereas in 2017 the average spend was £292.

• Both of these factors have resulted in a significant increase in the total value of visitors to the Orkney economy. This figure has increased from £31.1 million in 2013 to £49.5 million in 2017.
Final summary and conclusions
Summary and conclusions

Visitor profile

• The Orkney Islands have experienced substantial changes in tourism over recent years. There have been significant increases in the numbers of cruise ships visiting the islands, as well as increases in visitor numbers generally.
• This research has been conducted to ensure that Orkney Islands Council and its partners have relevant, accurate and up-to-date data to guide strategic planning to maximise the value of tourism for the Orkney economy in a sustainable way, and ensure that visitors have an excellent experience on the islands.

• Almost two thirds of visitors to Orkney in 2017 were on a holiday/leisure trip, while 19% were business/work visitors and 14% had travelled to the islands to visit friends or relatives.
• The islands attract Leisure visitors from all over the world, although the largest proportion come from Scotland (27%) or other parts of the UK (32%). One fifth of all Leisure visitors were from Europe, with 12% from North America and 9% from other overseas countries (mostly Australia and New Zealand).
• Business and VFR visitors were predominantly from Scotland.

• The gender profile of Leisure visitors was slightly skewed to males (58%), and the age profile tended to be older (72% over 45 years old).
• The majority of Leisure visitors were on holiday with their partner or spouse, while just less than one in ten had children in their party.
• Almost two thirds of Leisure visitors were first time visitors to Orkney, while one third had visited before.
Summary and conclusions
Visitor journey

• The research has highlighted the key attributes associated with Orkney that influenced Leisure visitors to visit are the scenery, the history/culture and the archaeology.

• Inspiration came from a number of sources, with TV programmes such as Britain’s Ancient Capital, Coast and Islands on the Edge being particularly important (mentioned as inspiring by 29%).

• Planning the trip tends to start at least 3 months before travel, with visitors researching using mainly online sources and talking with family and friends. This finding highlights the opportunity to use advocacy to spread the word and encourage people to visit the islands. Indeed, over three quarters of visitors scored 9 or 10 out of 10 in terms of their propensity to recommend Orkney to others.

• VisitOrkney and VisitScotland websites were particularly well used by Leisure visitors during the planning process. It is also significant that 50% of those who researched online looked at traveller reviews and ratings.

• Booking of transport and accommodation tends to be done directly with providers, rather than via agents or other intermediaries.
Summary and conclusions

Trip profile

• Approximately 85% of all visitors stayed overnight on their trip to Orkney. The majority of overnight visitors (84%) stayed for a period of one week or less.

• Kirkwall, Stromness and West Mainland were the most popular areas to visit – over 80% of Leisure visitors visited these three areas. The main activities undertaken by Leisure visitors reflect their reasons for visiting Orkney – the majority mentioned visiting archaeological sites, taking short walks, visiting beaches and general touring and sightseeing. Activities tended to be somewhat passive, with few visitors mentioning more active pursuits such as sports, cycling, water sports, etc. There may be an opportunity to attract younger visitors with focussed marketing of these activities on Orkney.

• Across all visitors, hotels was the most frequently mentioned type of accommodation (29%), followed by self-catering (26%) and B&Bs (19%). For Leisure visitors self-catering was a more popular option (32%) than hotels (26%). Although only 5% of Leisure visitors mentioned ‘homestay’ accommodation (such as Airbnb), this option was more popular amongst younger visitors and is likely to become more prevalent in the future if availability on Orkney increases.

• Online sources of information were particularly important to Leisure visitors during their trip, although the majority also used printed materials, such as brochures and guidebooks, and 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.
Summary and conclusions
Evaluation of trip experience

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

• Their interactions with local people were particularly praised. The aspects of their trip which received the highest satisfaction scores were the quality and value for money of visitor attractions, historic sites, etc. and the quality of local food and drink. The quality of accommodation was also widely regarded as excellent.

• The key area for improvement was identified as the extent and quality of digital coverage (Wi-Fi, mobile phone signal, 3G/4G). Open-ended responses also suggested that travel and transport options were restrictive for some.

• Encouragingly, many Leisure and VFR visitors agreed that there is more to Orkney than previously thought (72%) and that Orkney is worth visiting more than once (89%). Furthermore, almost two thirds of Leisure visitors rated their likelihood to return to Orkney with a score of 8 or more out of 10.

• Overall, 79% of all visitors, and 84% of Leisure visitors stated that they were ‘very satisfied’ with their trip to Orkney.
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.
Technical appendix
Data processing and analysis

• 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.