



progressive

Orkney Islands Visitor Survey 2019 Executive Summary

Orkney Islands Council and
VisitScotland



ORKNEY
ISLANDS COUNCIL

Background and method



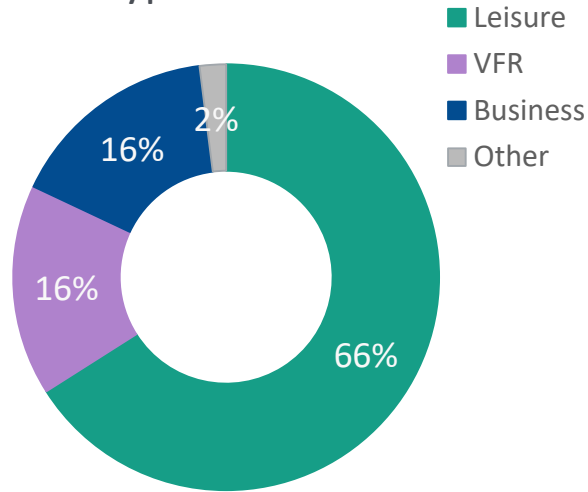
- Orkney Islands Council, in partnership with VisitScotland, commissioned Progressive to conduct a visitor survey on the Orkney Islands in 2019. The objectives of the research were to provide robust and up-to-date estimates of visitor volume and value, as well as information on experiences, motivations, behaviours and perceptions. The research conducted in 2019 was the second wave of the study following an initial baseline wave undertaken in 2017.
- The research data was gathered using a 2 stage approach:
 - Stage 1 – Calibration interviews conducted face-to-face with visitors at key exit points from the islands – ferry terminals and airport
 - Stage 2 – Follow-up online survey to gather more detailed feedback
- Stage 1 - Calibration Interviews
 - In total, 4,621 calibration interviews were completed – 2,957 visitors; 1,608 island residents; 56 others
 - The research included only people departing by ferry or air and therefore excluded cruise passengers and people travelling by yacht.
- Stage 2 - Online Survey
 - Respondents were asked if they would like to take part in an online survey at the end of the calibration interview.
 - In total, 2,361 online survey invites were sent.
 - The final sample response was 1,187 completed online surveys (50% response rate).
- Calibration data was weighted to reflect the distribution of passengers at each airport/ferry terminal. Online data was weighted to reflect the profile of the calibration survey in terms of country of origin and trip type.

Profile of visitors to Orkney

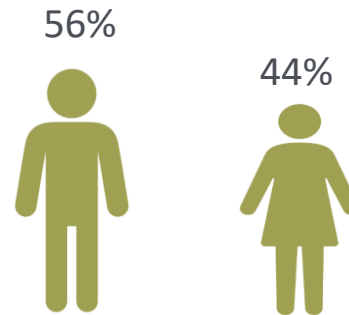
- Key metrics



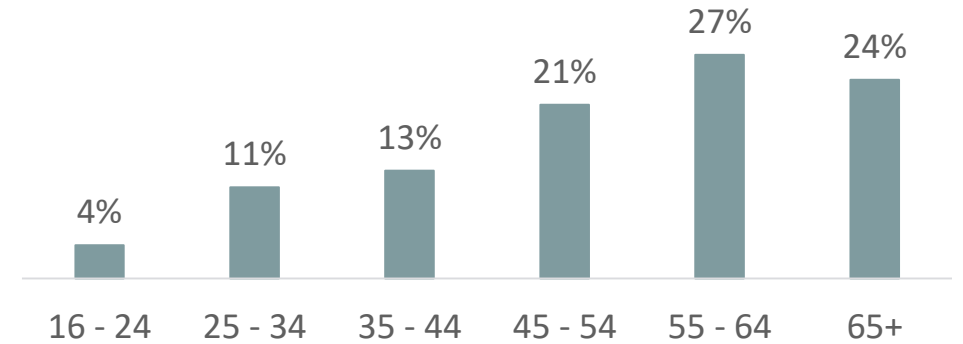
Type of visitor



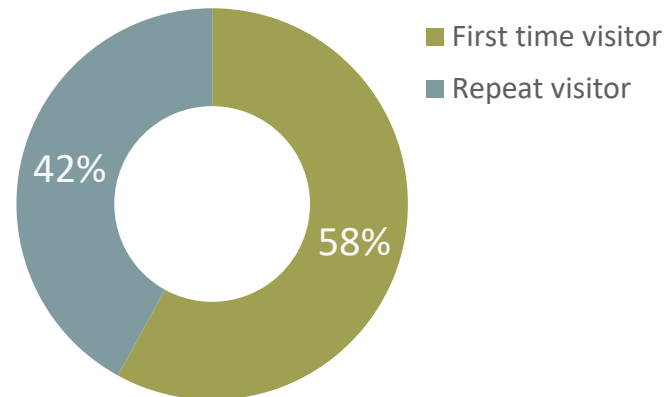
Gender*



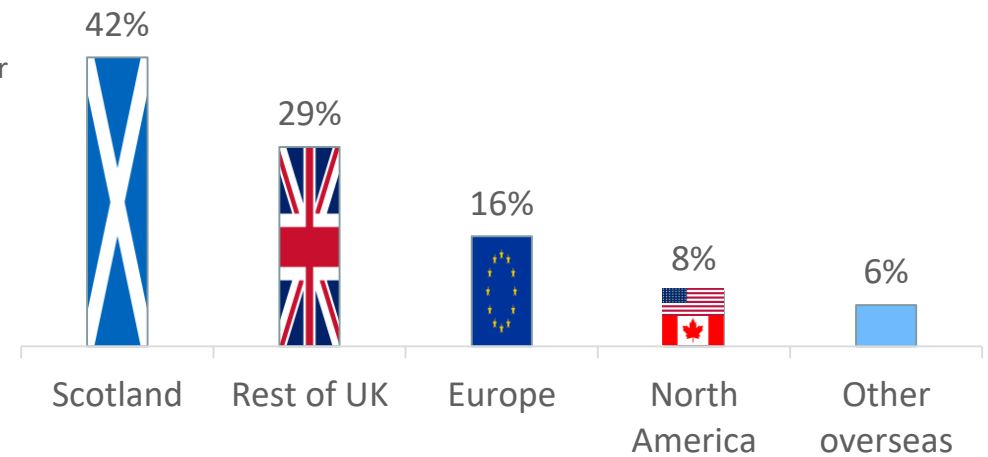
Age*



Been to Orkney before?



Where are you from?



The profile of visitors in 2019 closely matched the profile measured in 2017. There have been small increases in first time visitors (51% in 2017) and in older age groups (46% aged 55+ in 2017, compared to 51% in 2019).

Base (Age, gender, origin, purpose): All calibration visitors – 2,957
Base (been before?): All online respondents – 1,146

* The gender and age profile of the sample may differ from the profile of actual visitors due to possible response bias.

Profile of Leisure visitors

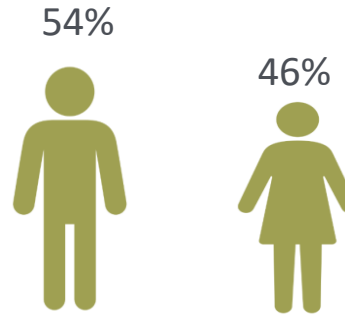
- Key metrics



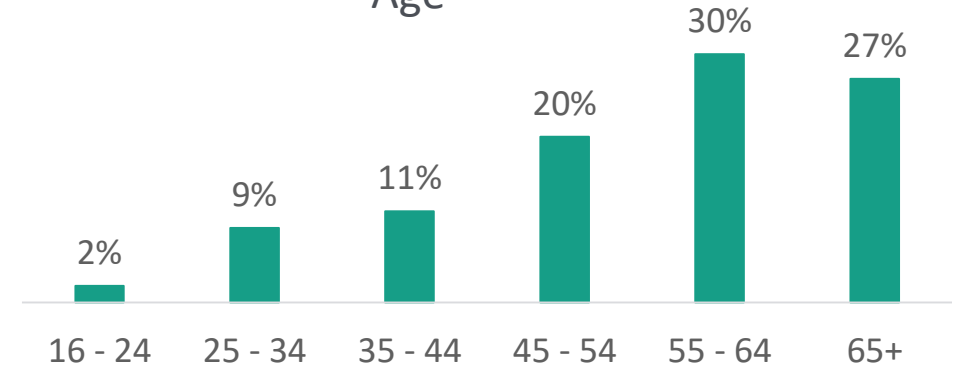
Type of visitor



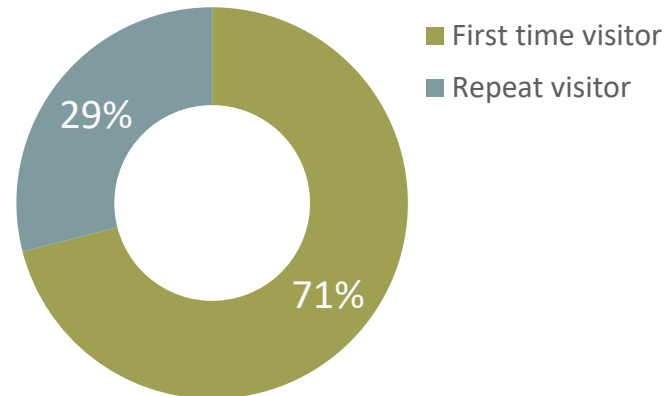
Gender*



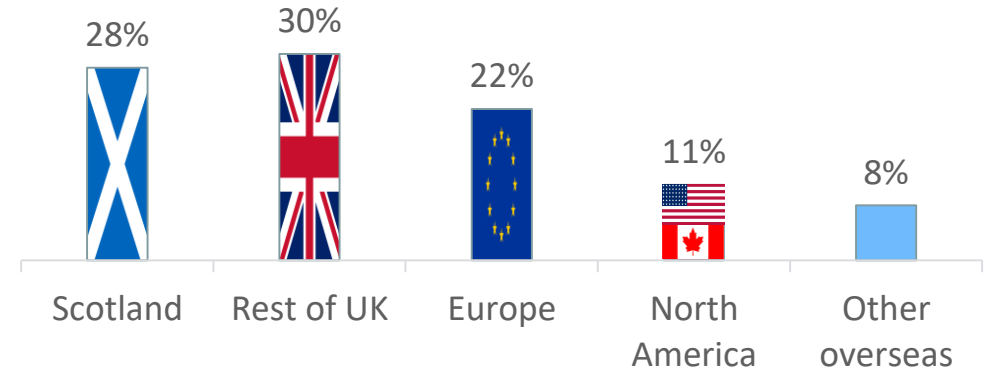
Age*



Been to Orkney before?



Where are you from?



The profile of Leisure visitors in 2019 was mostly unchanged from 2017. There was, however, an increase in first time visitors – from 65% in 2017 to 71% in 2019.

Base (Age, gender, origin, purpose): All calibration visitors – 1,896
Base (been before?): All online respondents – 875

* The gender and age profile of the sample may differ from the profile of actual visitors due to possible response bias.

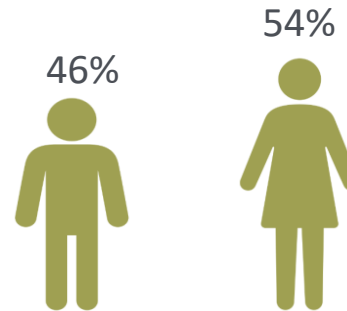
Profile of people visiting friends and relatives - Key metrics



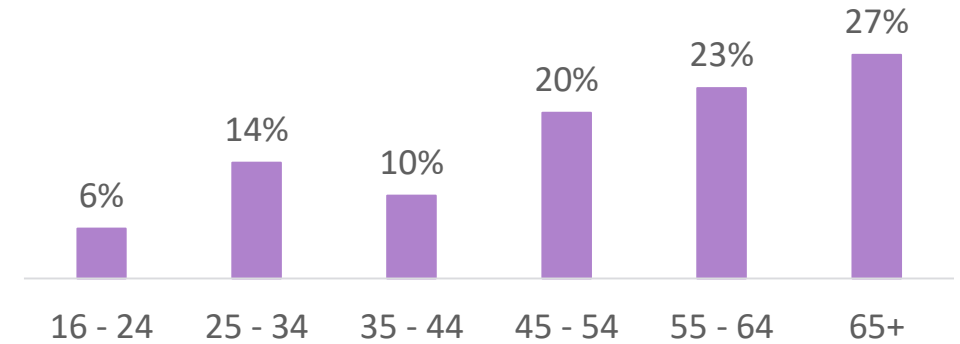
Type of visitor



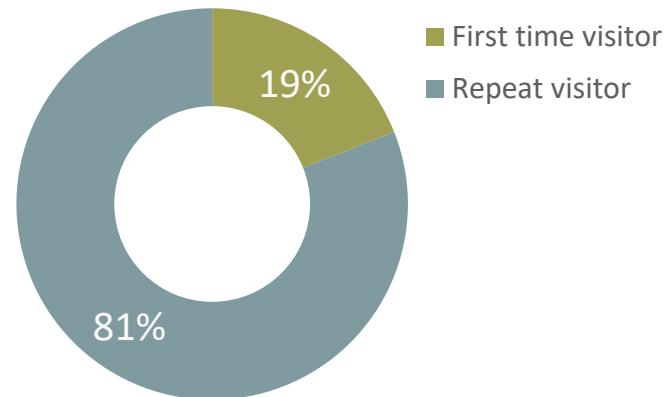
Gender*



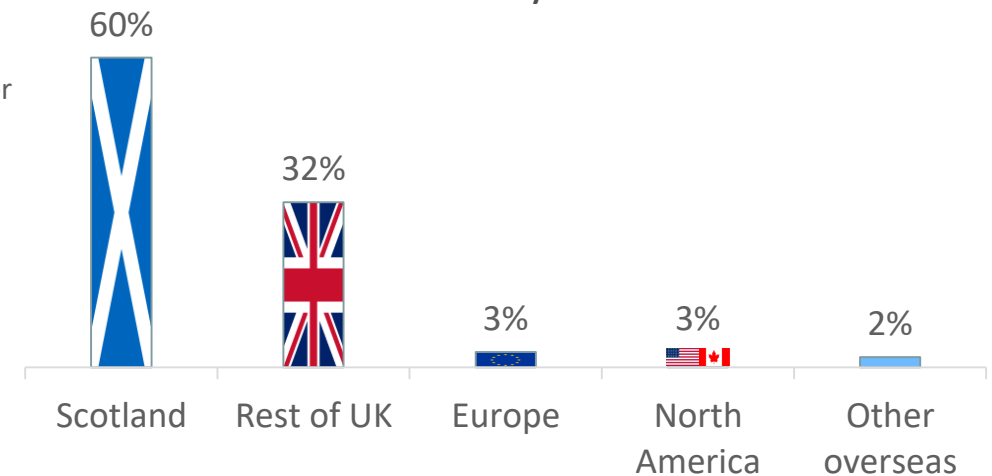
Age*



Been to Orkney before?



Where are you from?



In general the profile of VFR visitors in 2019 very closely matched the profile in 2017. There was an increase in female VFR visitors in 2019 (54%) compared to 2017 (49%).

Base (Age, gender, origin, purpose): All calibration visitors – 493
Base (been before?): All online respondents – 187

* The gender and age profile of the sample may differ from the profile of actual visitors due to possible response bias.

Profile of Business visitors

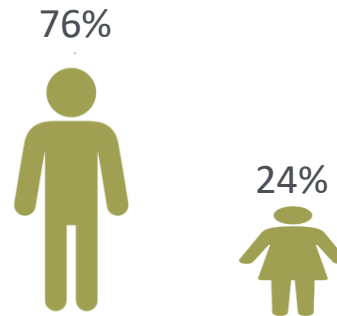
- Key metrics



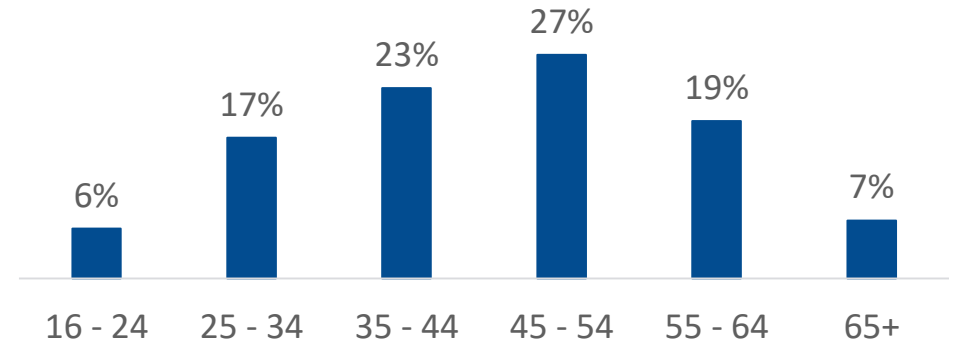
Type of visitor



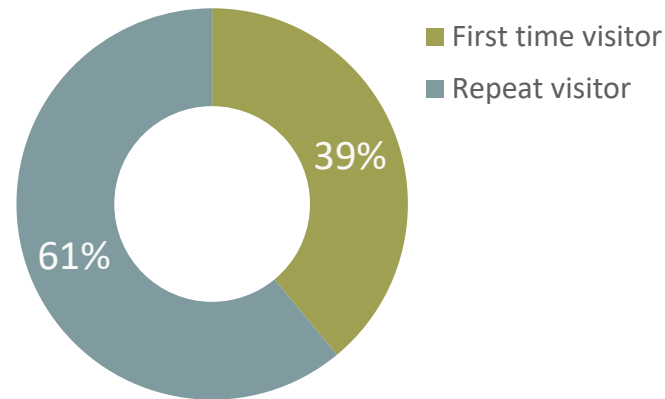
Gender*



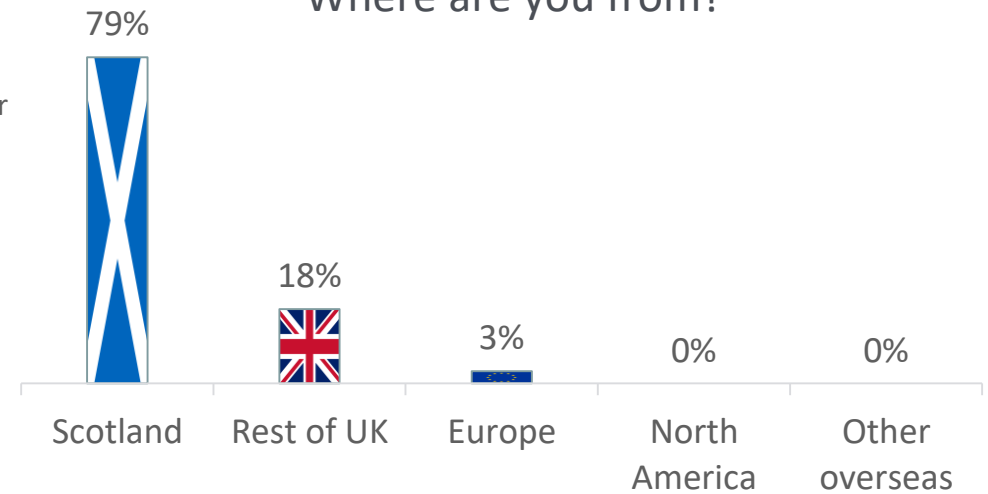
Age*



Been to Orkney before?



Where are you from?



The profile of Business visitors in 2019 was generally very similar to the profile measured in 2017. There were, however, more female business visitors in 2019 (24%, compared to 19% in 2017). There was also an increase in first time visitors (25% in 2017).

Base (Age, gender, origin, purpose): All calibration visitors – 513
Base (been before?): All online respondents – 75

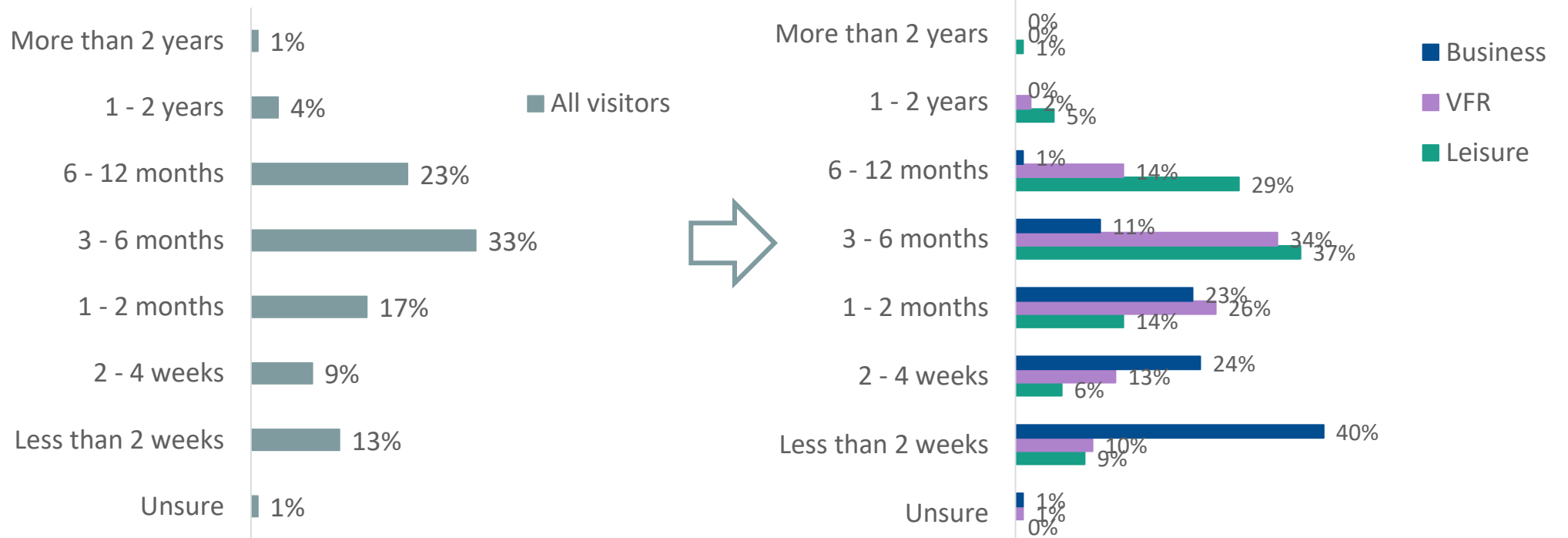
* The gender and age profile of the sample may differ from the profile of actual visitors due to possible response bias.

Planning a trip to Orkney



Planning the trip tends to start at least 3 months before travel. Leisure and VFR visitors were more inclined to plan further in advance than Business visitors. Although broadly consistent with 2017 data, there was some evidence that Leisure and VFR visitors are planning and booking further ahead in 2019 – possibly reflecting higher demand for accommodation.

How far in advance did you plan your trip?



Base (All): All 1,146; Leisure 875; VFR 187; Business 75

Motivations to visit Orkney

Leisure visitors only



Similar to 2017, the scenery and the history/culture were the main factors influencing Leisure visitors to visit Orkney in 2019. Over half also said simply that they had always wanted to visit.

Half of Leisure visitors were inspired by something they had seen or heard – e.g. TV programmes (Britain’s Ancient Capital, Time Team, etc.), travel features in the press/guidebooks and books about or set in Orkney.

Key Reasons for Visiting Orkney



Scenery and landscape – 62%



History and culture – 57%



Always wanted to visit – 56%

Inspiration for Visiting Orkney



TV programme – 21%



Travel feature in press/guidebooks - 19%



A book about Orkney - 10%

Information used to plan the visit

Leisure visitors only



Visitors used mainly online sources, talking with family and friends and printed travel guidebooks to plan their trip → advocacy continues to be an important factor encouraging people to visit the islands.

Indeed, as was found in 2017, 91% of Leisure visitors in 2019 scored 8 or more out of 10 in terms of their likelihood to recommend Orkney to others.

Social media was used by a minority of Leisure visitors (11%), however, the proportion mentioning it has increased since 2017 (6%).

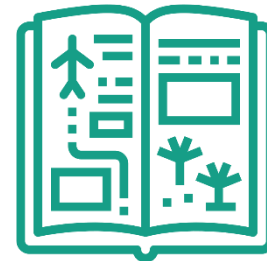
Sources Used During Planning



Websites – 76%



Talking with friends/family – 37%



Printed travel guide books – 32%

Online information

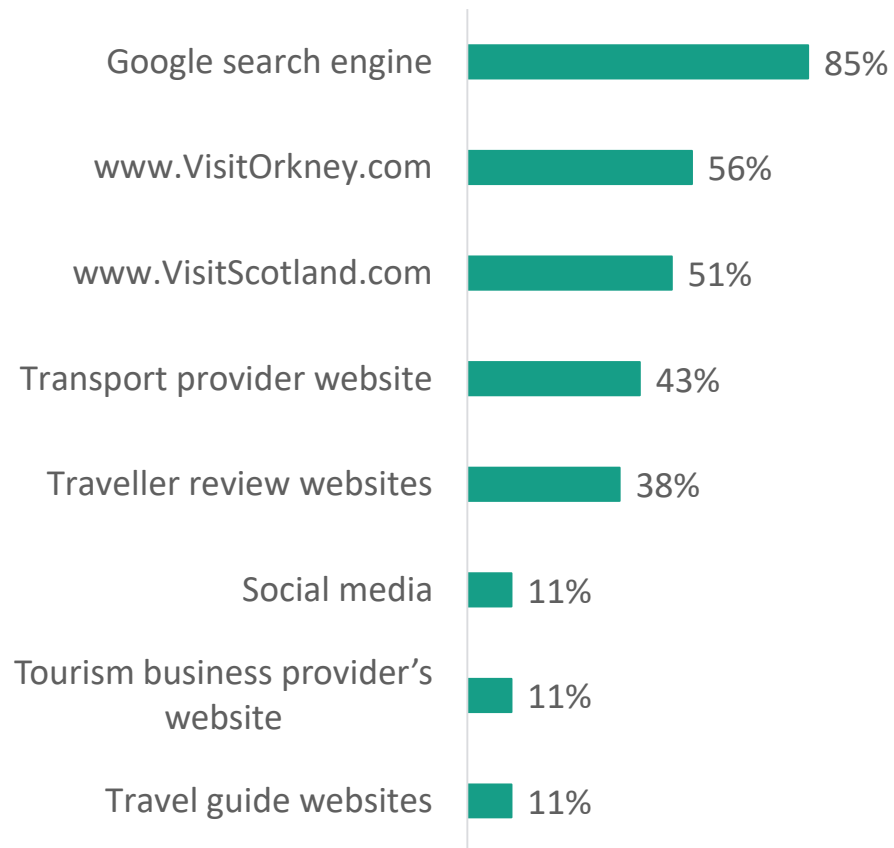
Leisure visitors only



76% used websites when planning visit



Websites used during planning
(top responses)



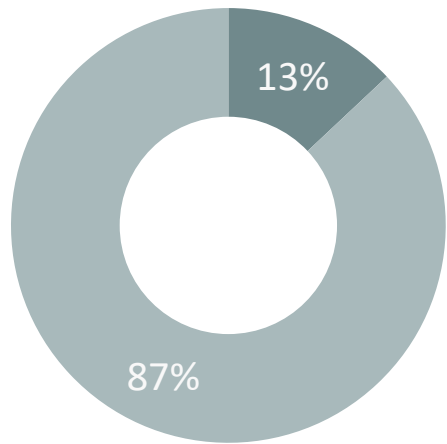
Online information used during planning
(top responses)



Trip profile - All visitors

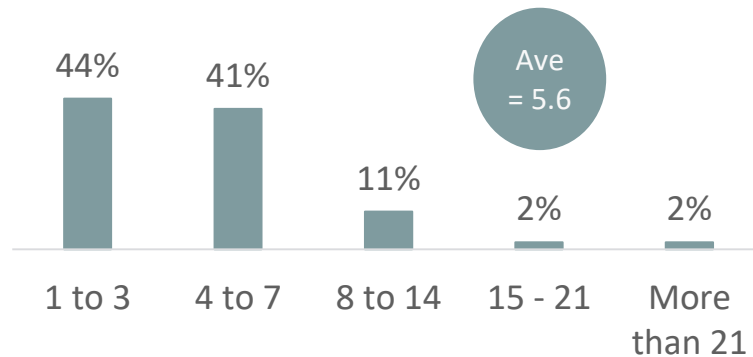


Type of trip

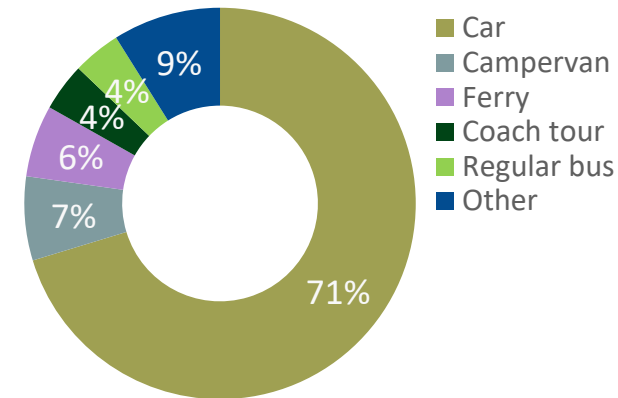


■ Day trip
■ Overnight

Number of nights



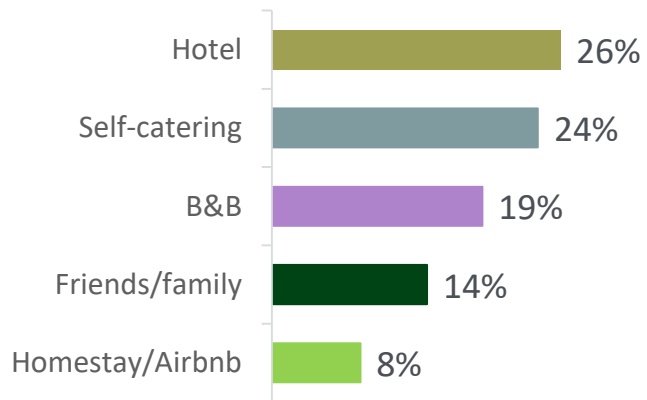
Main type of transport



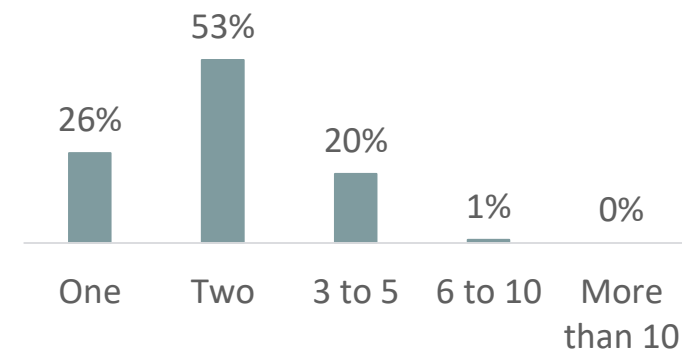
Areas visited (top 4)



Accommodation (top 5)



Number of people in party



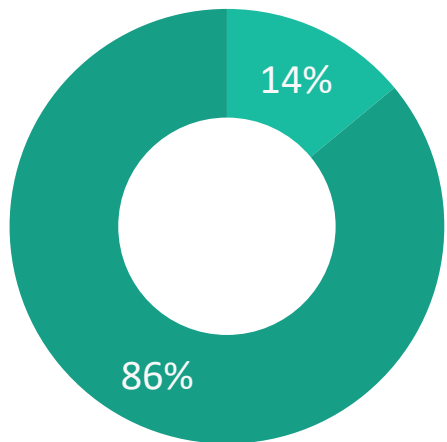
Compared to 2017 there was an decrease in the proportion travelling alone (31% in 2017). The average number of nights was also lower in 2019 (6.7 in 2017). There have been increases in those mentioning campervans for transport (4% in 2017). 2019 also saw an increase in mentions of homestay (e.g. Airbnb) accommodation – from 4% in 2017 to 8% in 2019.

Base (Trip type, no of people): All calibration visitors – 2,957
 Base (No of nights): Overnight calibration visitors – 2,681
 Base (Accom., transport, areas): Online – 1,095 – 1,187

Trip profile - Leisure visitors

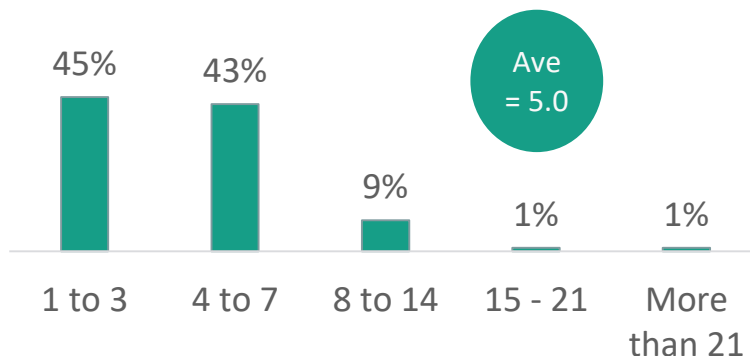


Type of trip

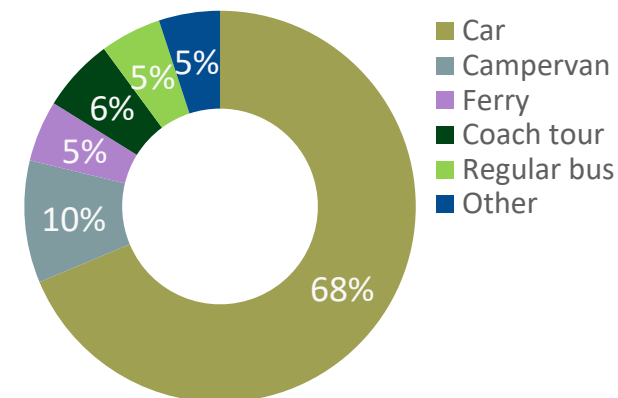


- Day trip
- Overnight

Number of nights



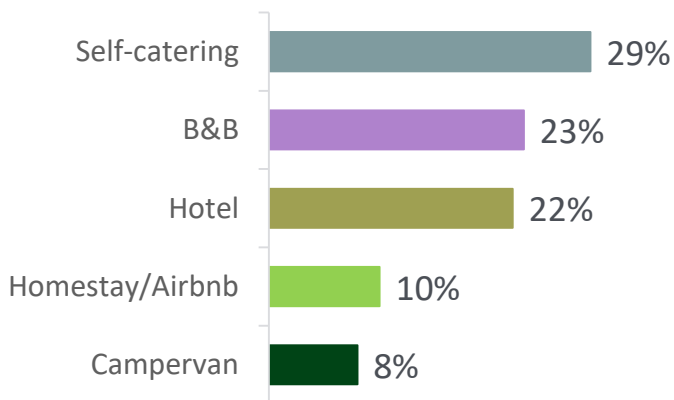
Main type of transport



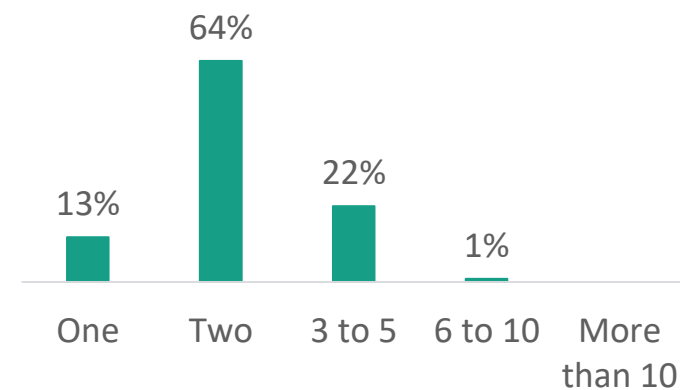
Areas visited (top 4)



Accommodation (top 5)



Number of people in party



Fewer Leisure visitors were travelling alone in 2019 (13%) compared to 2017 (17%). There were also small decreases in those staying in hotels and self-catering and an increase in those staying in homestay accommodation (5% in 2017). There was an increase in people travelling by campervan in 2019 (10%) compared to 2017 (5%).

Base (Trip type, no of people): All calibration Leisure visitors – 1,896
 Base (No of nights): Overnight calibration Leisure visitors – 1,716
 Base (Accom., transport, areas): Online Leisure visitors – 804 - 875

Sources of information used during trip

Leisure visitors only



Online continues to be the primary source of information for Leisure visitors during their trip. The majority also used printed materials, such as local information, brochures and guidebooks.

Compared to 2017, there was a decline in usage of visitor information centres (56% in 2017) and an increase in usage of local heritage information (21% in 2017). In 2019 more people mentioned social media (13%) than in 2017 (7%).

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

Sources of Information Used During Trip



Websites –
84%



Visitor info
centres – 41%



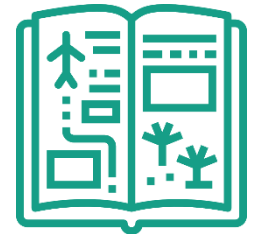
Local Heritage
information – 35%



Asking locals
– 34%



VisitScotland
brochure – 31%



Locally produced
guide books – 30%

Evaluation of visitor experience

All visitors



Interactions with local people were again a particular highlight for visitors – similar to 2017, most agreed they were made to feel welcome, the local people really added to their trip and they experienced excellent customer service.

The aspects of their trip which received the highest satisfaction scores were the quality and value for money of visitor attractions, historic sites, etc., the quality of local food and drink and the quality of local arts and crafts products. The quality of accommodation was also widely regarded as excellent.



Made to feel welcome – 96% agreed
Local people really added to the experience – 89% agreed



I experienced excellent customer service – 91% agreed



Value for money of visitor attractions – 79%
(rated 8 or more out of 10)



Quality of visitor attractions – 88%
Quality of food and drink – 78%
Quality of local arts and crafts – 76%
(rated 8 or more out of 10)

Potential improvements

All visitors



There was an improvement in perceptions of digital coverage in 2019 (availability of free Wi-Fi, mobile phone signal coverage and availability of 3G/4G) with more people satisfied with this than in 2017, particularly 3G/4G. However there remains some scope for improvement with around one third dissatisfied.

Signage/information, transport and food and drink choices were the most mentioned suggested improvements (each highlighted by less than 10% of visitors).

Rating of digital coverage



Availability of free Wi-Fi
Rated 6 to 10 – 71%
Rated it 5 or less – 29%



Mobile phone signal coverage
Rated 6 to 10 – 70%
Rated it 5 or less – 30%



Availability of 3G / 4G
Rated 6 to 10 – 67%
Rated it 5 or less – 33%

Suggested improvements



Open ended comments suggested that for some visitors there was a lack of signage and information; restaurant and food choices were limited; and more could be done regarding transport links across the Island.

Overall satisfaction with experience

Leisure visitors



The vast majority of visitors to Orkney provided a very positive evaluation of their experience on the islands – similarly high ratings were measured in both 2017 and 2019.

In 2019, 91% of Leisure visitors rated their satisfaction with their trip to Orkney with a score of 8, 9 or 10 out of 10 – 51% gave a perfect 10 out of 10 score.



74% agreed that there is more to Orkney than they previously thought

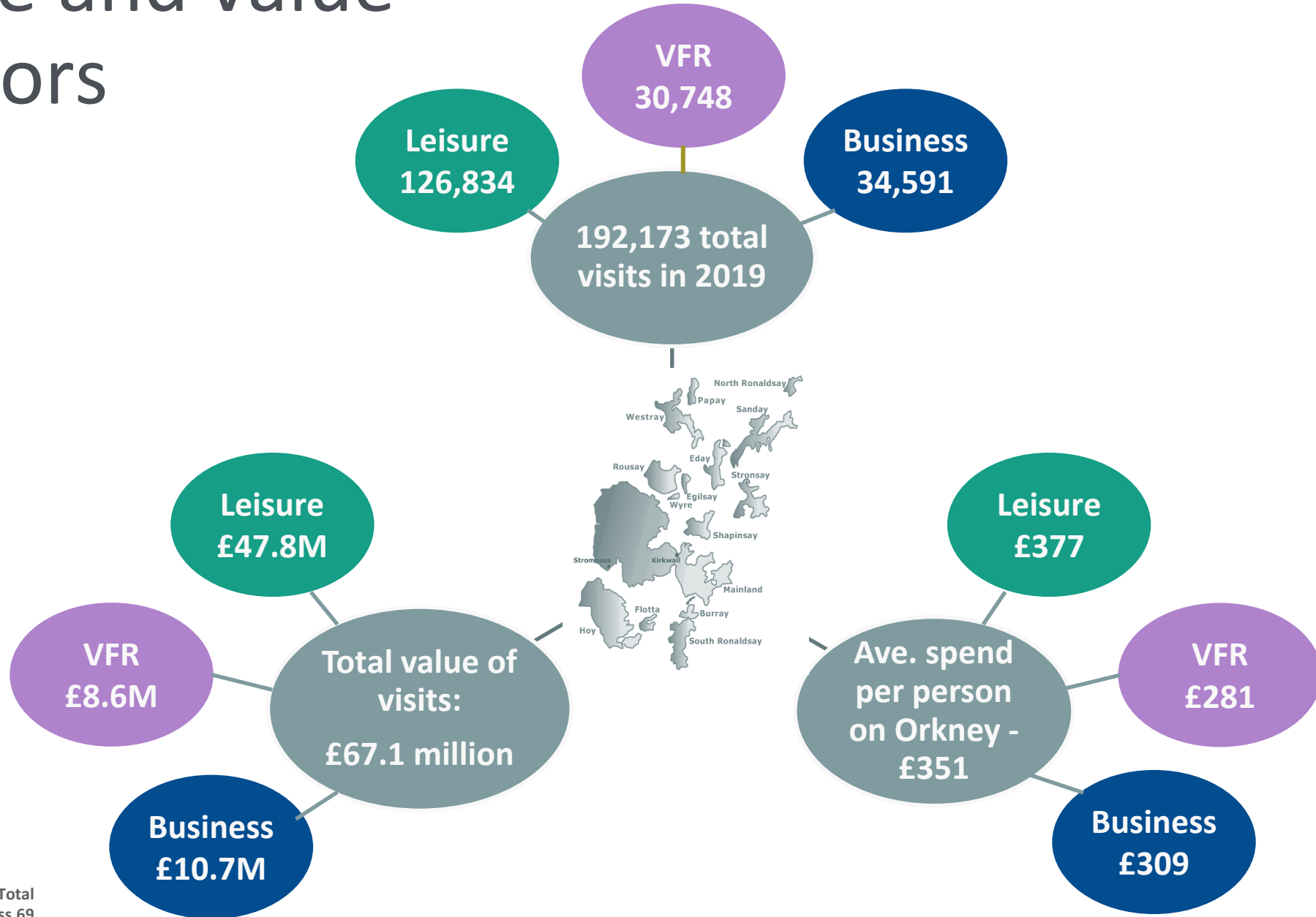


88% agreed that Orkney is worth visiting more than once.
58% scored at least 8 out of 10 in terms of their likelihood to return in the next 5 years.




91% of Leisure visitors scored at least 8 out of 10 in terms of their overall satisfaction with their trip to Orkney

Volume and value of visitors



Base (All who provided spend data): Total 828; Leisure 627; VFR 132; Business 69



Technical appendix

Technical appendix

Method and sampling



- 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 2019.
- The target sample size for the calibration interviews was 3,500 and the final achieved sample size was 4,621. 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 840 and the final achieved sample size was 1,187. 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 2019.
- 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 50%.
- 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 via close monitoring of the online survey to measure % email addresses collected, % bounce backs and response rate to online survey. 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)
- 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.
- 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.
- 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.
- 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.