

progressive

Orkney Islands Visitor Survey 2019

Orkney Islands Council and
VisitScotland

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Project background

- Tourism is one of the most important economic drivers for the Orkney Islands. The islands receive more than 174,000 visits per year from leisure and business visitors, over and above the 140+ cruise ships that visit the islands in the peak summer months.
- Orkney Islands Council has a strategic objective to ensure that the islands benefit economically from tourism, but in a way that protects its natural, historical and cultural assets, whilst ensuring environmental sustainability, continuous development of high quality tourism products and extending the season.
- Strategies to achieve these objectives must 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 research in 2017 to provide robust estimates of visitor volume and value, as well as detailed insight into the experiences, motivations, behaviours and perceptions of visitors to the islands. This research provided a baseline against which future waves could be compared in order to identify trends and monitor the impact of tourism initiatives on the islands. This report details the findings from the second wave of the research completed in 2019.



Project objectives



* VFR – Visiting friends and relatives

- 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 2019 – 22nd January to 18th December.
 - The sampling points were:
 - Kirkwall Airport
 - Stromness Ferry Terminal
 - Kirkwall (Hatston) Ferry Terminal
 - St Margaret’s Hope Ferry Terminal
 - Burwick 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. Cruise ship passengers, people travelling by private yacht and those in transit were excluded from the survey.
 - In total, 4,621 calibration interviews were completed – 2,957 visitors; 1,608 island residents; 56 others

- 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, 2,443 visitors to Orkney agreed to take part in the online survey. 82 email addresses bounced back leaving a potential sample size of 2,361.
 - 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 1,187 completed online surveys (50% response rate)


Analysis

Statistical validity



- The margins of error associated with the data are detailed below. These are calculated at the 95% confidence interval (market research industry standard).

Sample type	Sample size	Margin of error
Total Calibration	4,621	+/- 0.28% to +/- 1.42%
Total Sample of Visitors - Calibration	2,957	+/- 0.36% to +/- 1.79%
Total Sample - Online	1,187	+/- 0.56% to +/- 2.83%
Leisure Visitors – Online	875	+/- 0.66% to +/- 3.31%
VFR Visitors – Online	187	+/- 1.42% to +/- 7.14%
Business Visitors - Online	116	+/- 1.81% to +/- 9.08%

- 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.
- In commentary where net figures are reported (i.e. when figures on charts are combined, for example, total booking more than 6 months before travel) these may differ slightly from the added figures in the chart. This is due to rounding and using absolute figures to calculate nets.
- On some charts figures of 0% and 1% are not shown for ease of reading.
- Only statistically significant differences are reported.

Analysis

Sub-sample analysis



- 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:

Visitor type	Base (unweighted)
Leisure	875
VFR	187
Business	116

Origin (Leisure)	Base (unweighted)
Scotland	235
Rest of UK	300
All overseas	344
Europe	153
North America	101
Other overseas	90

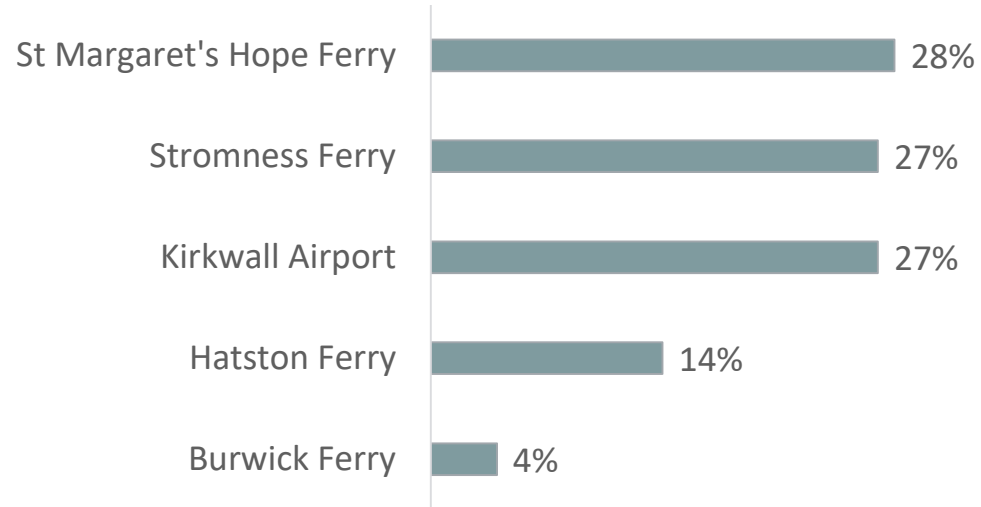
Demographics (Leisure)	Base (unweighted)
Male	462
Female	417
16 – 34	72
35 – 44	77
45 – 54	161
55 – 64	297
65+	267

Sample

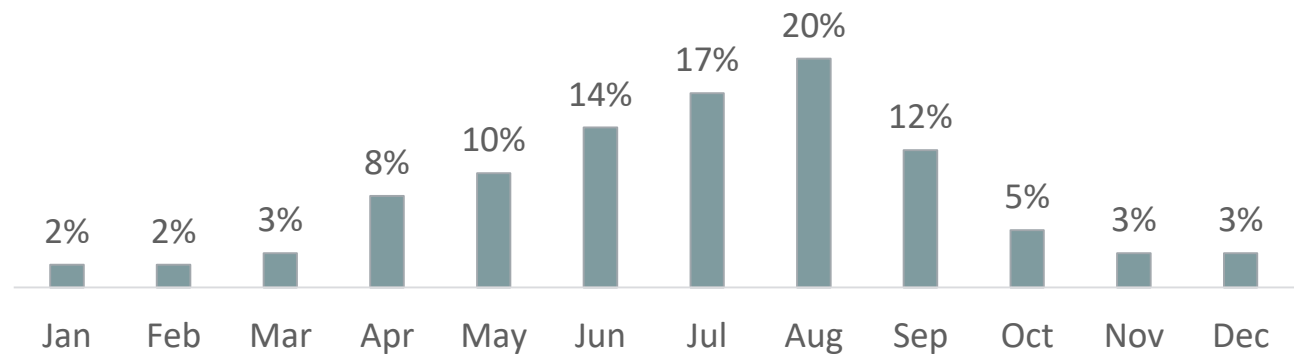
- The sampling plan was designed to provide a spread of interviews across exit points and months of the year.
- Interviewing was therefore higher in the peak season months of June, July, August and September.
- Passenger data by exit point was supplied by ferry and airport operators in 2017. This was used to create a sample plan representative of the volumes of passengers leaving the islands via each exit point. Accurate passenger data for 2019 was supplied by operators early in 2020 and this was used to weight the data as noted over.



Sampling point



Month



Base (All): 4,670

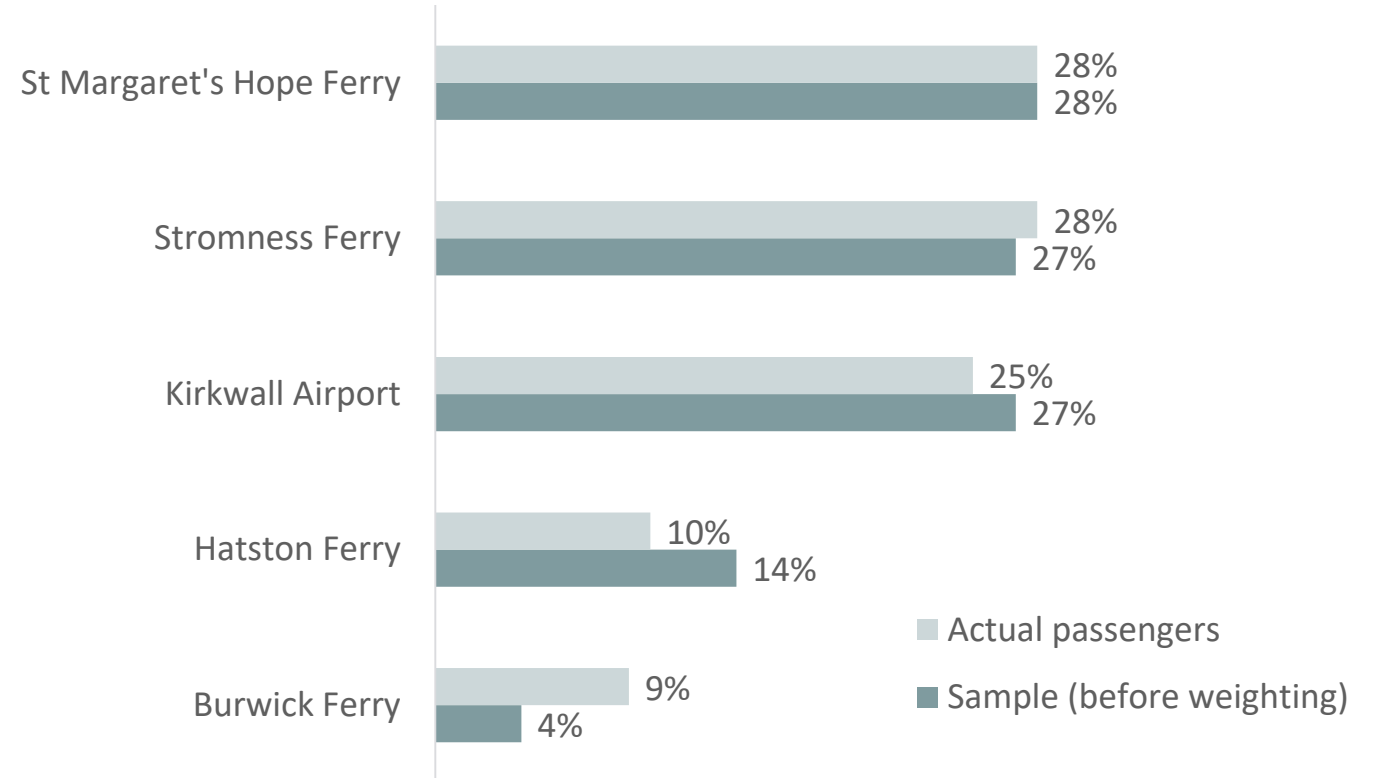
Data weighting

Calibration survey

- The calibration data was weighted by sampling point to reflect the actual distribution of passengers in 2019.
- Visitor numbers were provided by ferry operators (Hatston, Stromness, Burwick) and HIAL (Kirkwall Airport). We were not able to obtain passenger figures for St Margaret's Hope ferry passengers, therefore this figure was estimated based on 2017 data*.

* An increase of 8% on 2017 data was applied. This was based on the average % increase in passengers across the other ferry terminals.

Sampling point



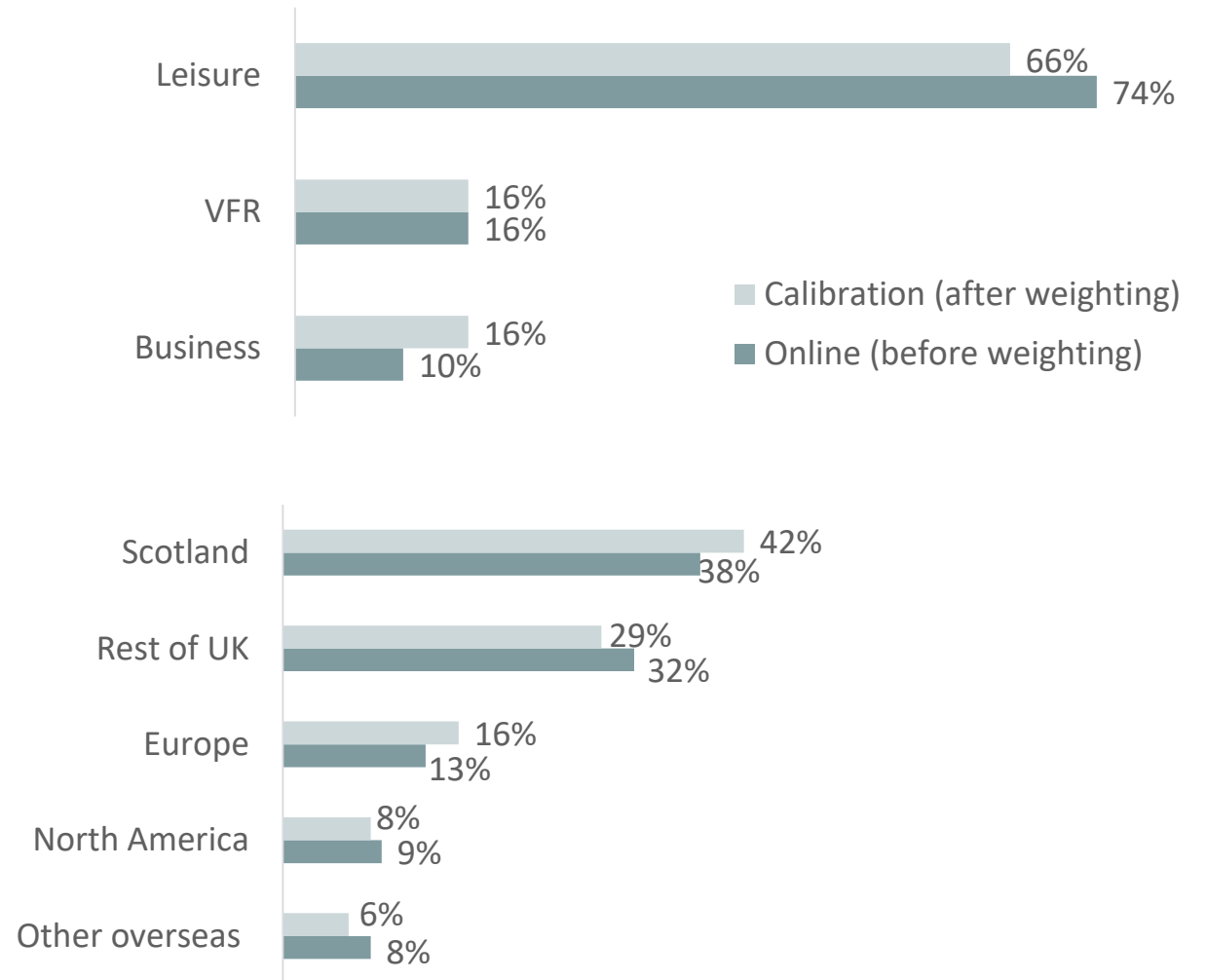
Base (All): 4,670

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.

Visitor type and origin



Base (All visitors): Calibration 2,957, Online 1,187



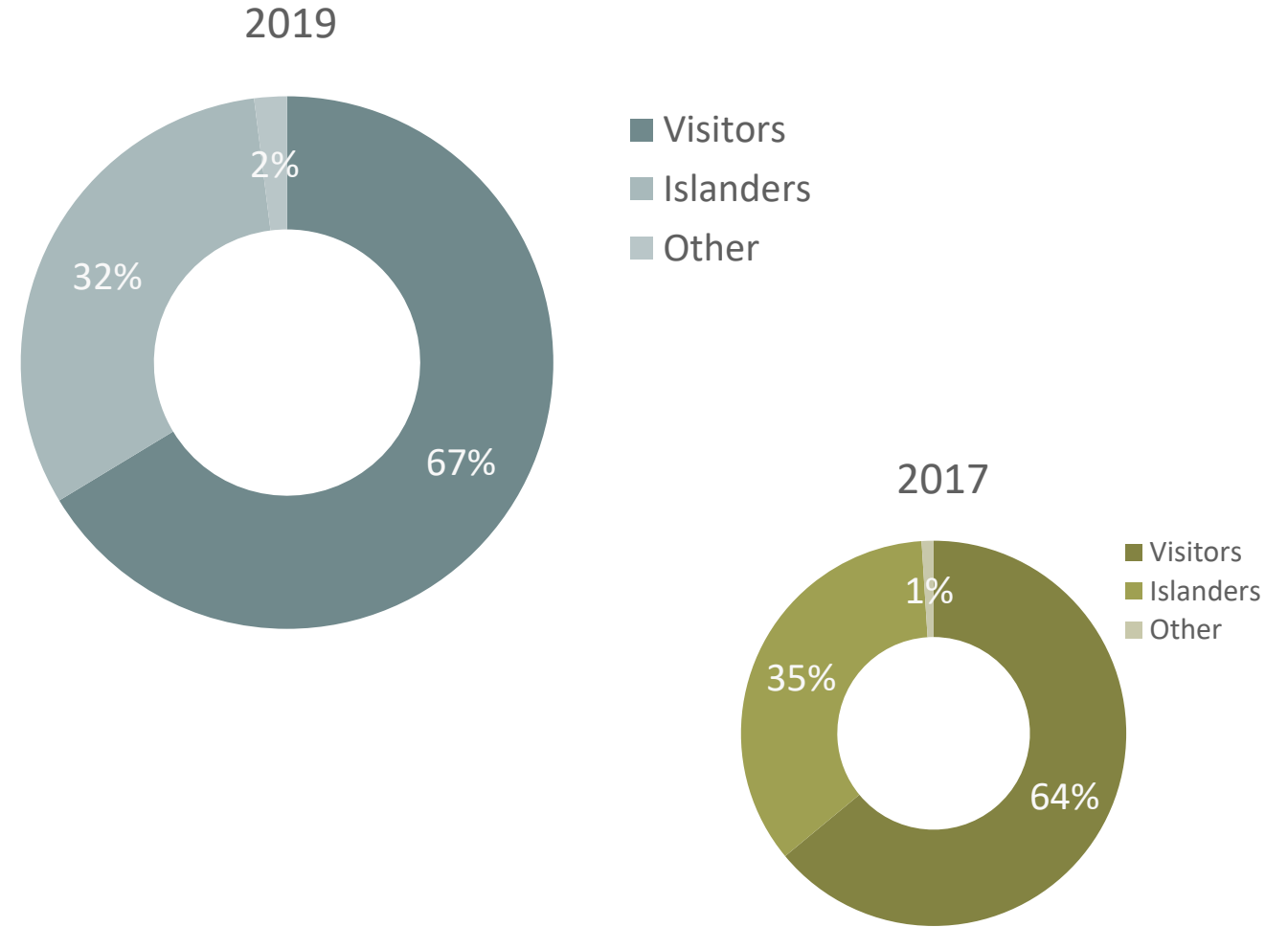
Visitor profile

Visitor profile

Proportion visitors

- Two thirds of all people interviewed for the calibration survey were visitors to Orkney.
- Almost one third were islanders and 2% were people in transit between islands; haulage drivers only visiting for the day; or people on a cruise or yacht trip.
- These proportions compare very closely to the 2017 data, with a small increase in visitors in 2019.

Islanders vs visitors



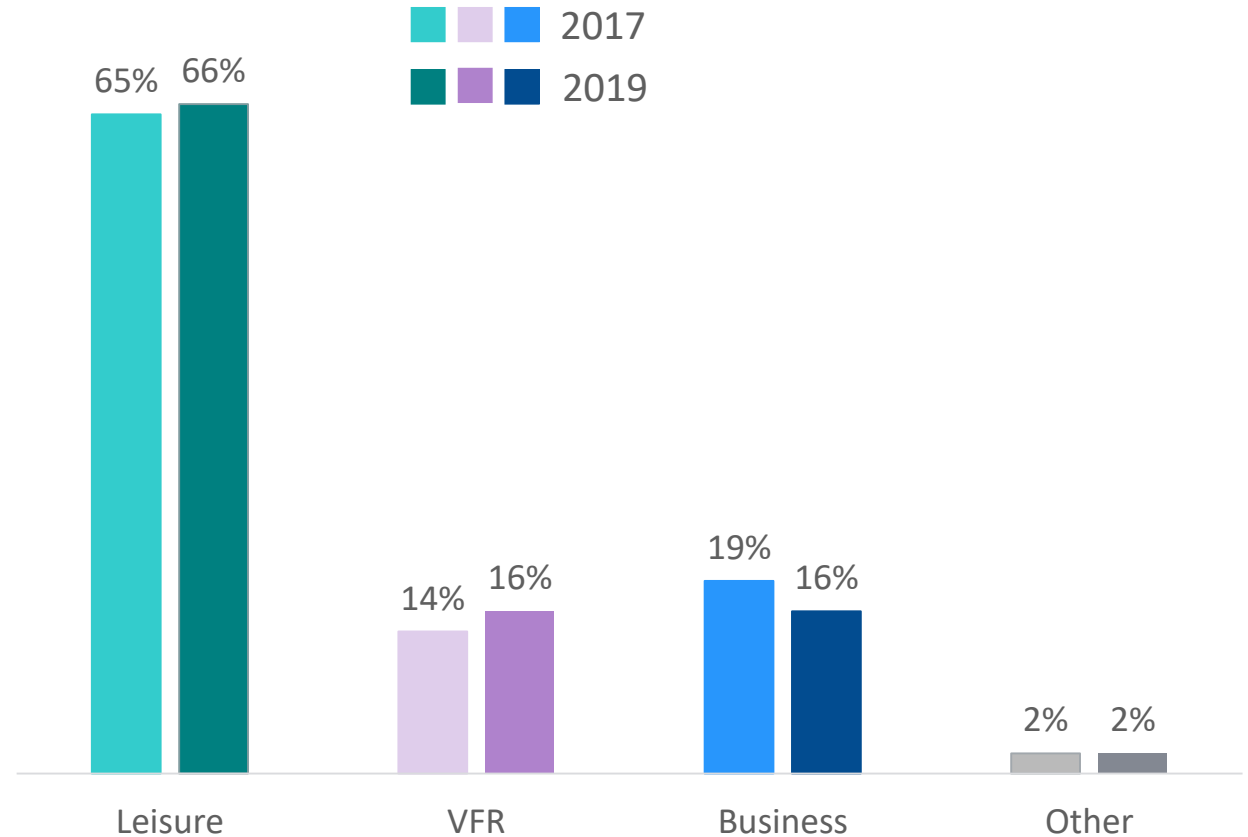
Base (All calibration): 2019: 4,621; 2017 (excluding Burwick): 4,999

Visitor profile

Trip purpose

- Two thirds of visitors to Orkney in 2019 were leisure visitors (66%). Equal proportions were visiting for business purposes or visiting friends or relatives (VFR) - approximately one in six (16%).
- These proportions are very similar to 2017: Leisure 65%; VFR 14%; Business 19%. Although small, the differences in VFR and Business visitors between 2017 and 2019 are statistically significant.

Trip Purpose

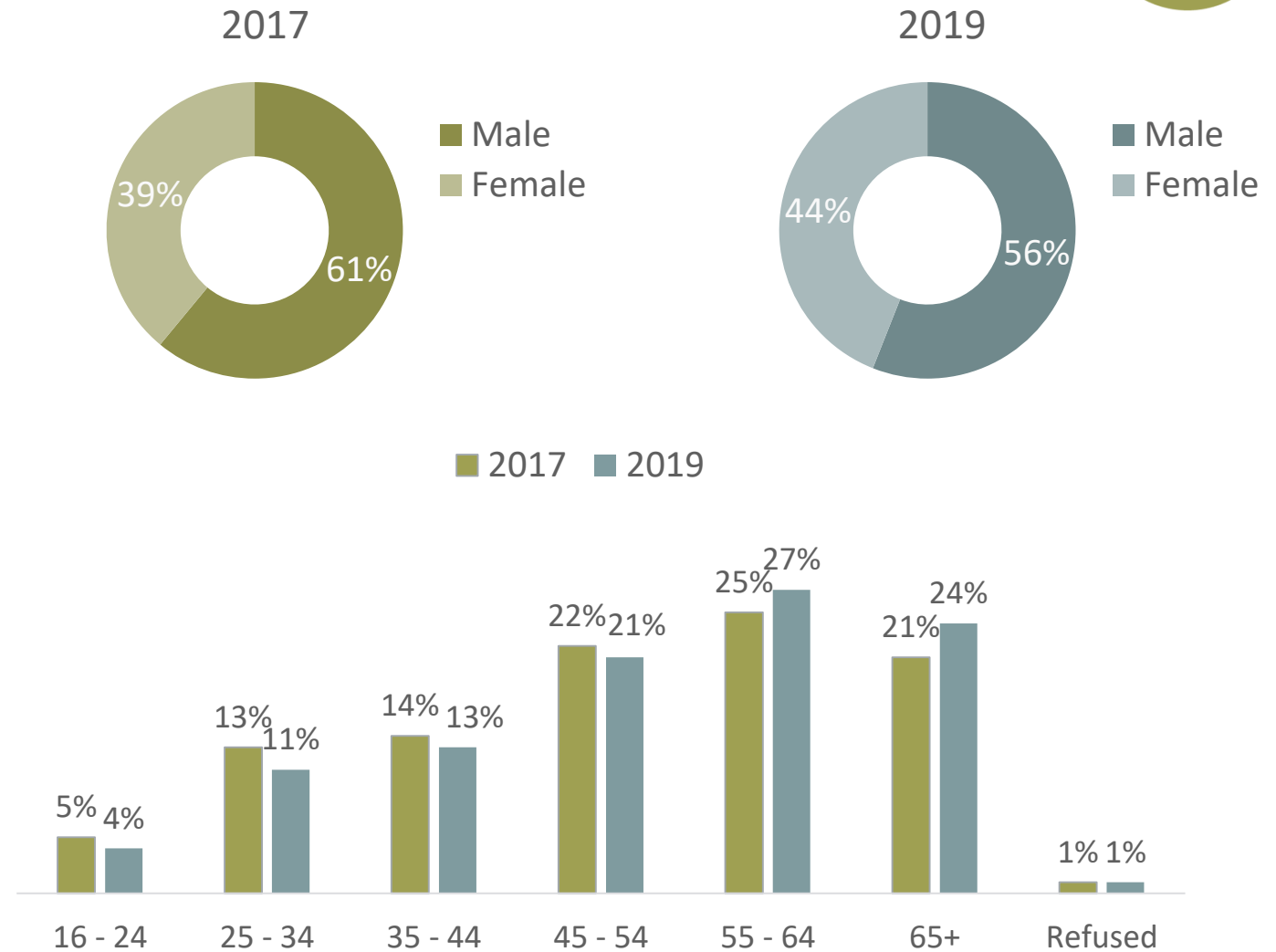


Visitor profile

Demographics

- The total sample of visitors to Orkney included more males (56%) than females (44%).
- The majority of the sample were aged over 44 years old (72%), with 24% aged between 25 and 44 and only 4% 16 to 24.
- These findings were broadly similar to 2017, however, a higher proportion of female visitors were noted in the 2019 sample.
- There were slightly more visitors in the older 55+ age groups in the 2019 sample – 51%, compared to 46% in 2017.

Age and gender



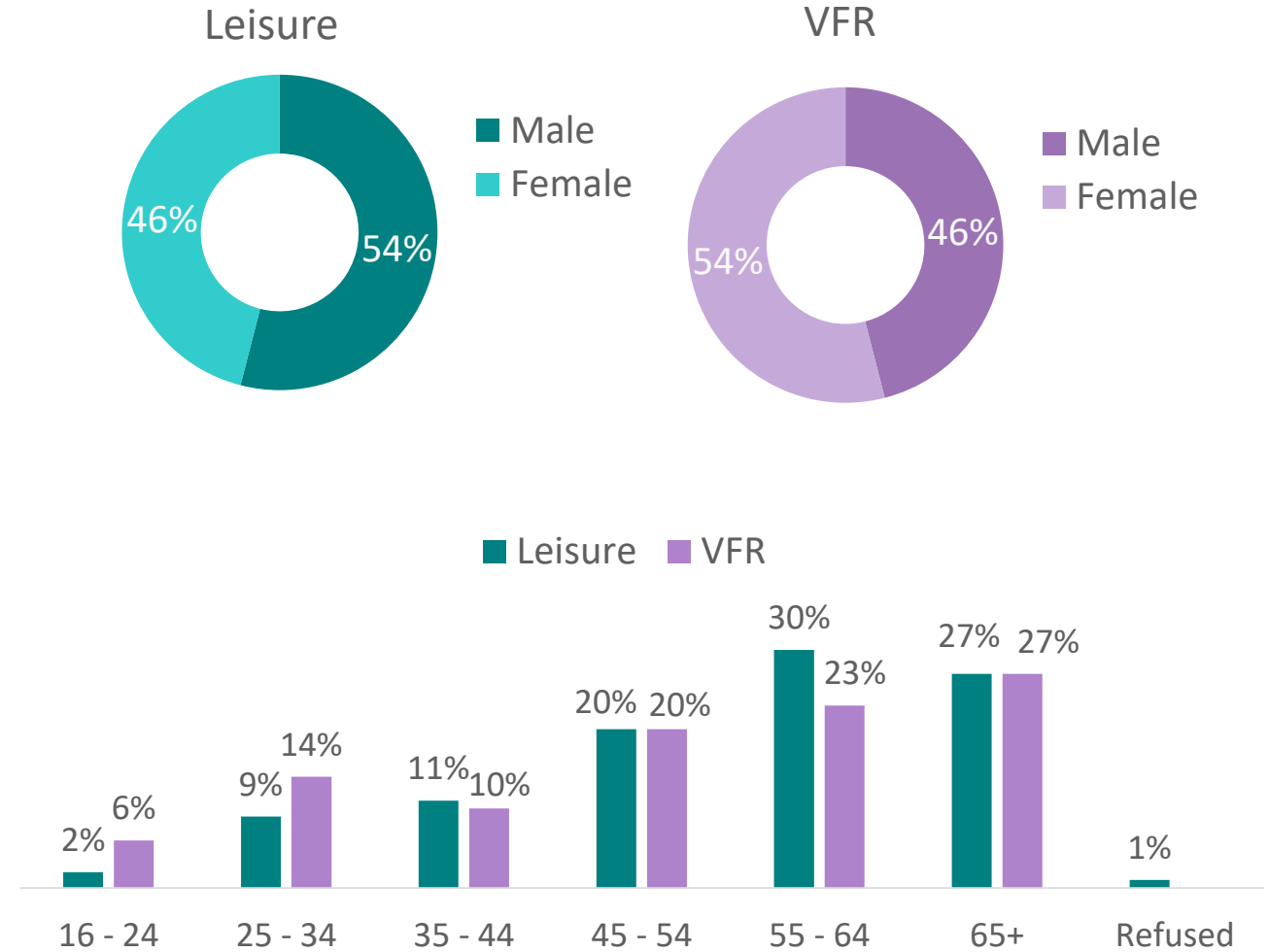
Base (All calibration visitors) 2019: 2,957, 2017: 3,418

Visitor profile

Demographics

- A higher proportion of the Leisure sample was male (54%) than female (46%) in 2019. For the VFR sample, the reverse was true: more were female (54%) than male (46%).
- The age profile of the VFR sample was also slightly younger than for Leisure visitors; 30% of VFR respondents were less than 45 years old, compared to 22% of Leisure respondents.
- These profiles are very closely aligned to the demographic profiles of the Leisure and VFR samples in 2017. 2019 did, however, see an increase in female Leisure respondents (42% in 2017) and female VFR respondents (49% in 2017).

Age and gender – Leisure and VFR



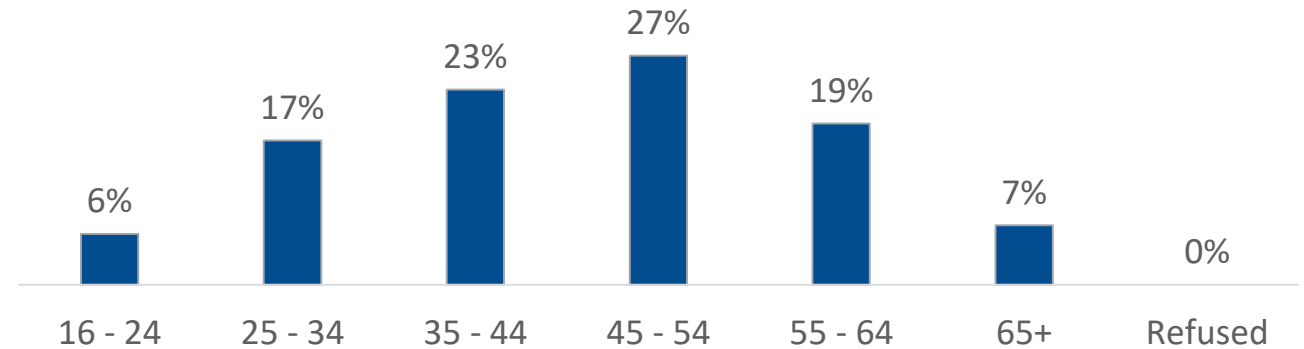
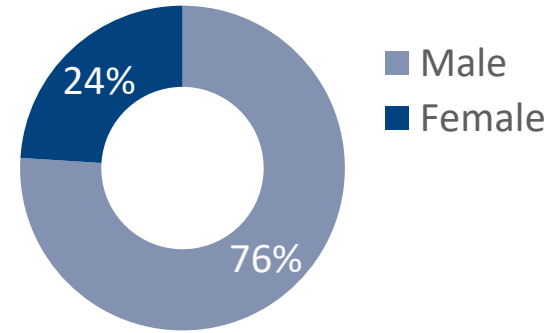
Base (All Leisure / VFR calibration visitors): Leisure 1,896, VFR 493

Visitor profile

Demographics

- The Business visitor sample was predominantly male (76%). The proportion of female business visitors was slightly higher in 2019 (24%) than in 2017 (19%).
- There was a wide spread of age groups for business respondents with 53% aged 45 years or older and 47% under 45. The age profile of Business visitor sample in 2019 was similar to 2017.

Age and gender - Business



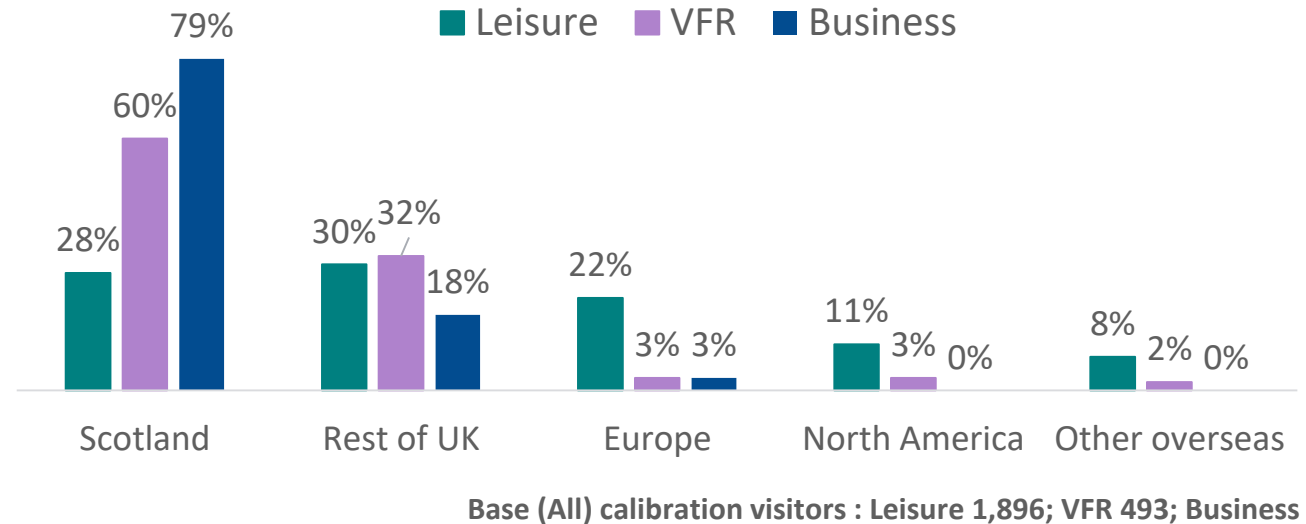
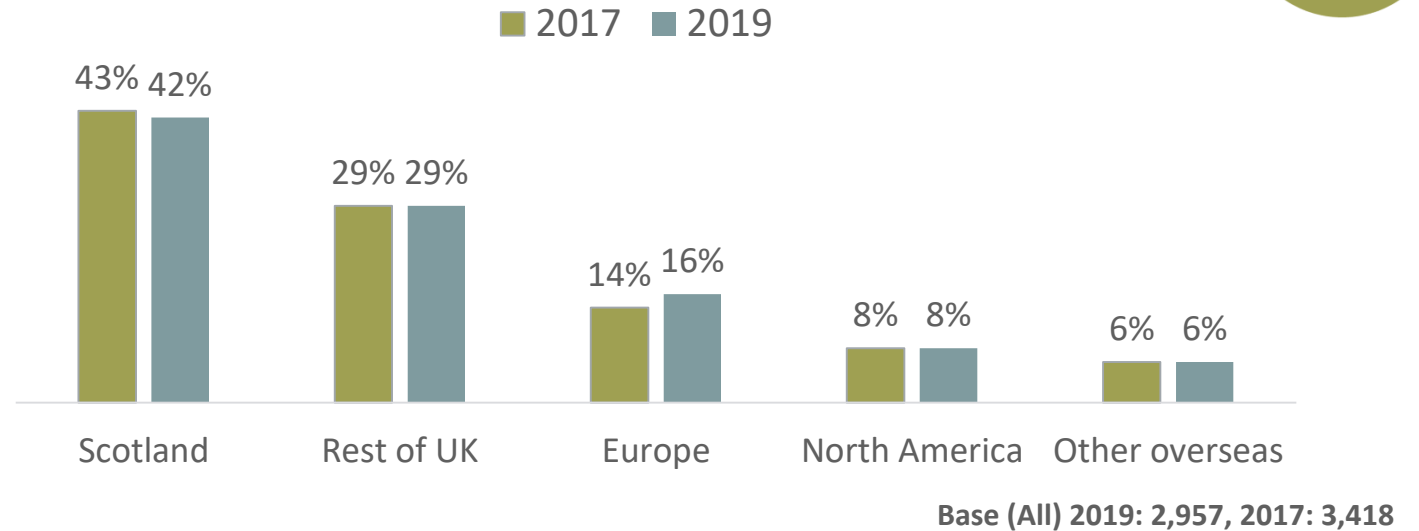
Visitor profile

Origin

- The majority of all visitors to Orkney in 2019 were from the UK (70%), with 42% from Scotland and 29% from the rest of the UK.
- Of the 30% overseas visitors, the largest proportion was from Europe (16%), with a further 8% from North America, 5% from Australia/New Zealand and 1% from other countries.
- The origin profile of visitors in 2019 closely matched the profile in 2017.
- As we would expect, amongst Leisure visitors the proportion of overseas visitors was higher (41%) and the proportion of visitors from Scotland was lower (28%) than for VFR or Business visitors. Both VFR and Business visitors were predominantly from Scotland.



Origin

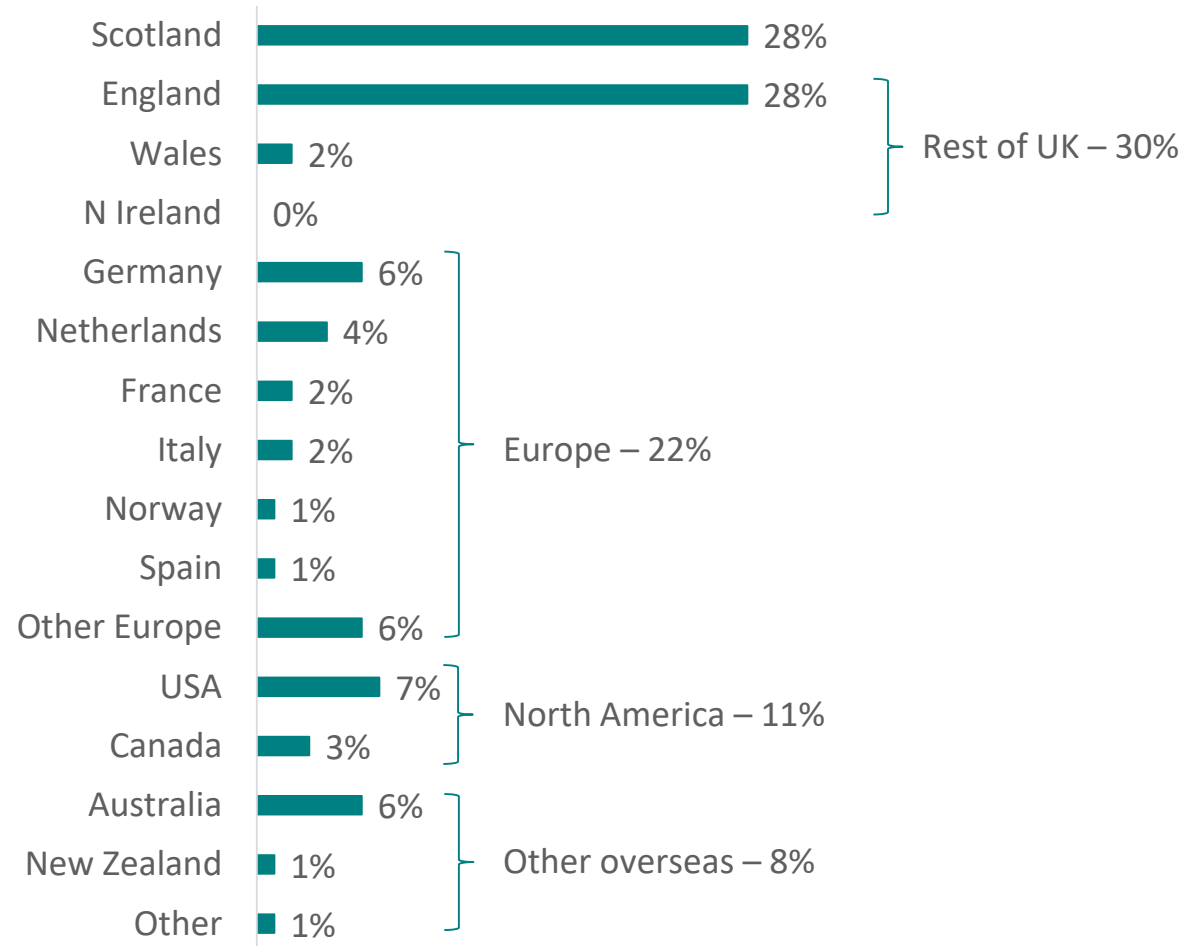


Visitor profile

Origin

- Outside of the UK, the largest market for Leisure visitors to Orkney is Europe. In total, 22% of Leisure visitors to Orkney in 2019 were from Europe.
- The most prevalent European Leisure visitors were from Germany (6%) and the Netherlands (4%).
- The USA accounted for 7% of Leisure visitors, while 6% were from Australia.
- The country of origin of Leisure visitors was very similar in 2019 to 2017 – in 2017 20% were from Europe, 12% from North America and 9% were from other overseas. The only differences were an increase in visitors from the Netherlands (2% in 2017) and a small decrease in visitors from the USA (10% in 2017).
- European visitors had a younger age profile than visitors from other countries – 18% were aged under 35 compared to average of 11% for all Leisure visitors.

Origin – Leisure visitors



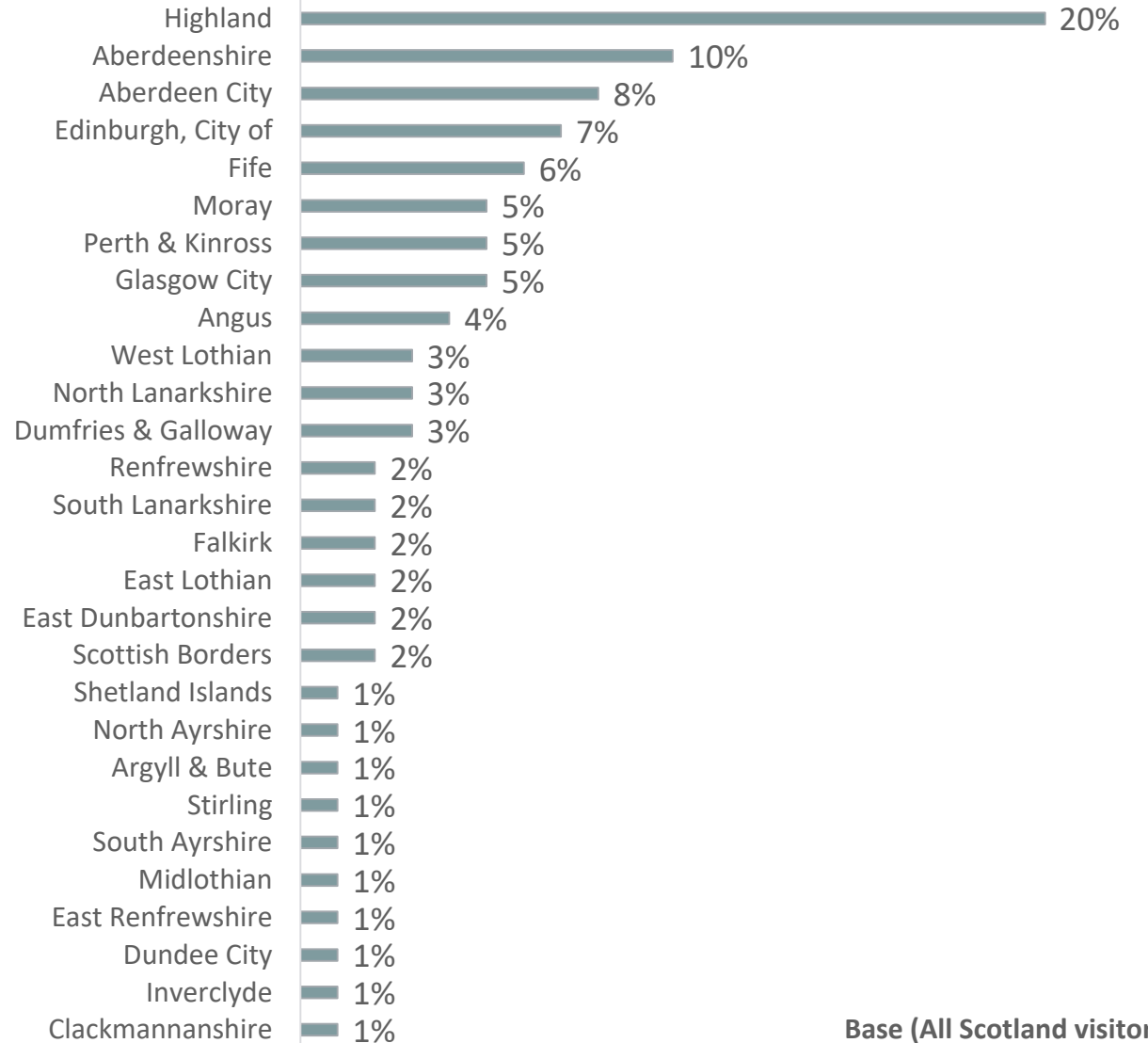
Base (All Leisure calibration): 1,896

Visitor profile

Origin

- The largest proportion of visitors from Scotland came from the Highland Council area (20%).
- Aberdeen and Aberdeenshire also accounted for around one in five visitors from Scotland.
- Orkney was also visited by a number of people from the east central belt, including Edinburgh (7%), Fife (6%) and Perth and Kinross (5%).
- This profile of visitors was very similar across Leisure, VFR and Business visitors but those visiting friends or relatives were more likely to be from Aberdeenshire than other visitors (17% VFR vs 6% of Business and 9% of Leisure visitors) and Business visitors were more likely than others to come from the Highland Council area (27% vs 17% of Leisure visitors and 14% of VFR).

Origin – Scotland visitors



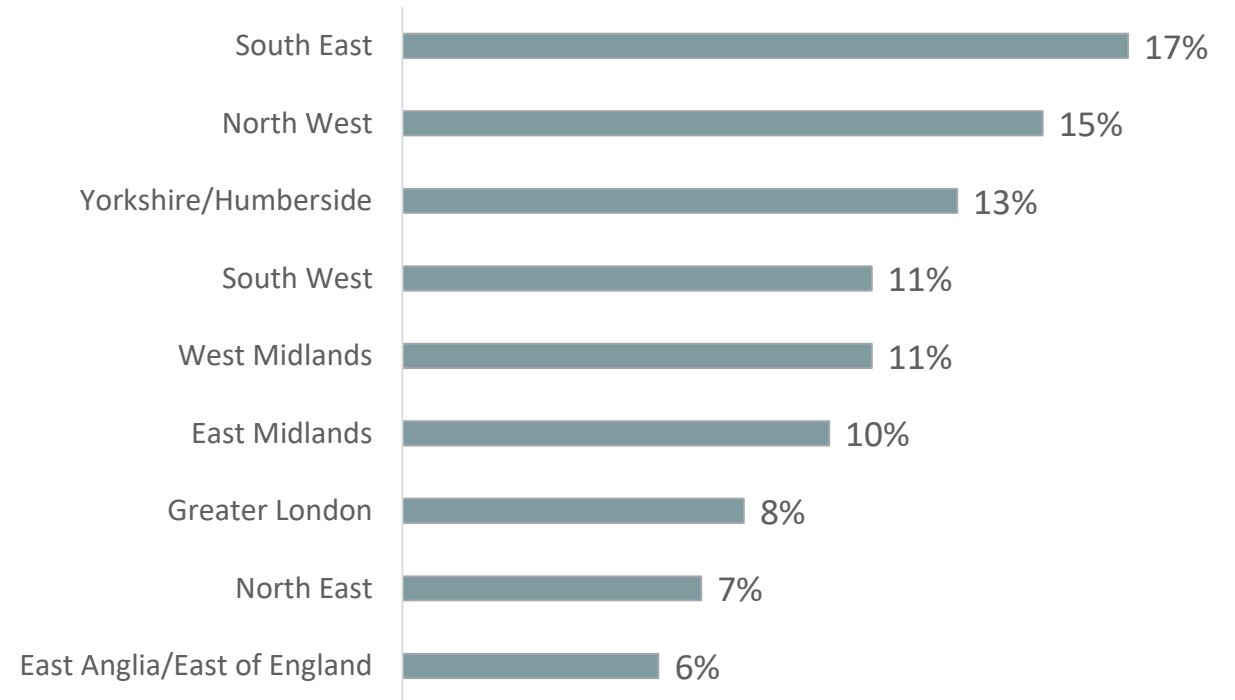
Base (All Scotland visitors): 447

Visitor profile

Origin

- Visitors from England came from a variety of regions.
- The top origin locations were the South East, North West and Yorkshire/Humberside.
- There were no significant differences in the proportions coming from each region in England in 2019 compared to 2017.
- There were also no significant differences in these findings between Leisure, VFR and Business visitors.

Origin – England visitors

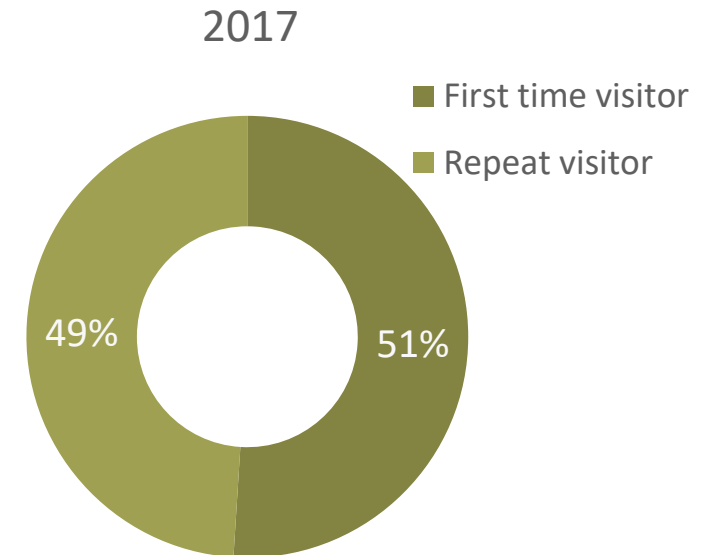
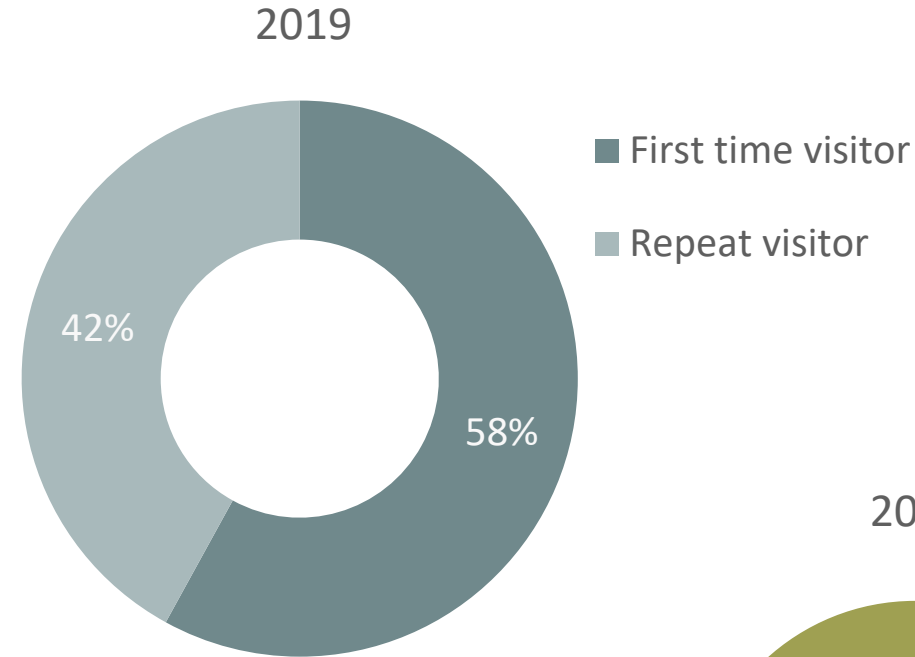


Visitor profile

First time/repeat visitors

- The largest proportion of visitors to Orkney in 2019 (58%) were first time visitors to the islands.
- This represents an increase in first time visitors since 2017, when around half had not been before.

Number of times visited Orkney



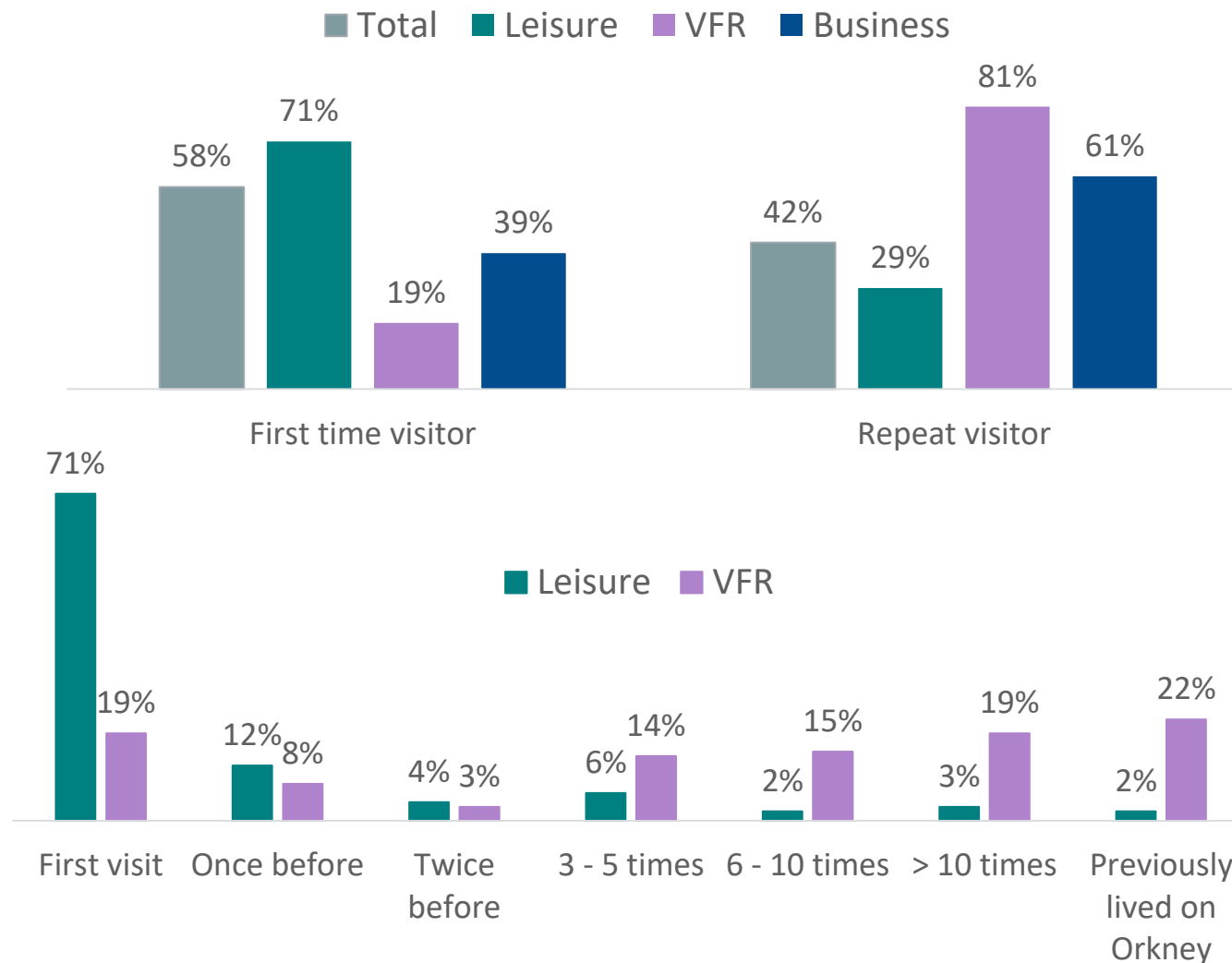
Base (All excluding rotational shift workers) 2019: 1,146, 2017: 1,295

Visitor profile

First time/repeat visitors

- Seven in ten Leisure visitors were first time visitors, while the majority of VFR (81%) and Business (61%) visitors had been before. Interestingly, there were more first time Business visitors in 2019 (39%) than in 2017 (25%).
- Amongst Leisure visitors, those from overseas were more likely to be first time visitors (88%) than those from Scotland (46%) or the rest of UK (67%).

Number of times visited Orkney



Q15: Approximately how many times have you visited Orkney before your recent trip?

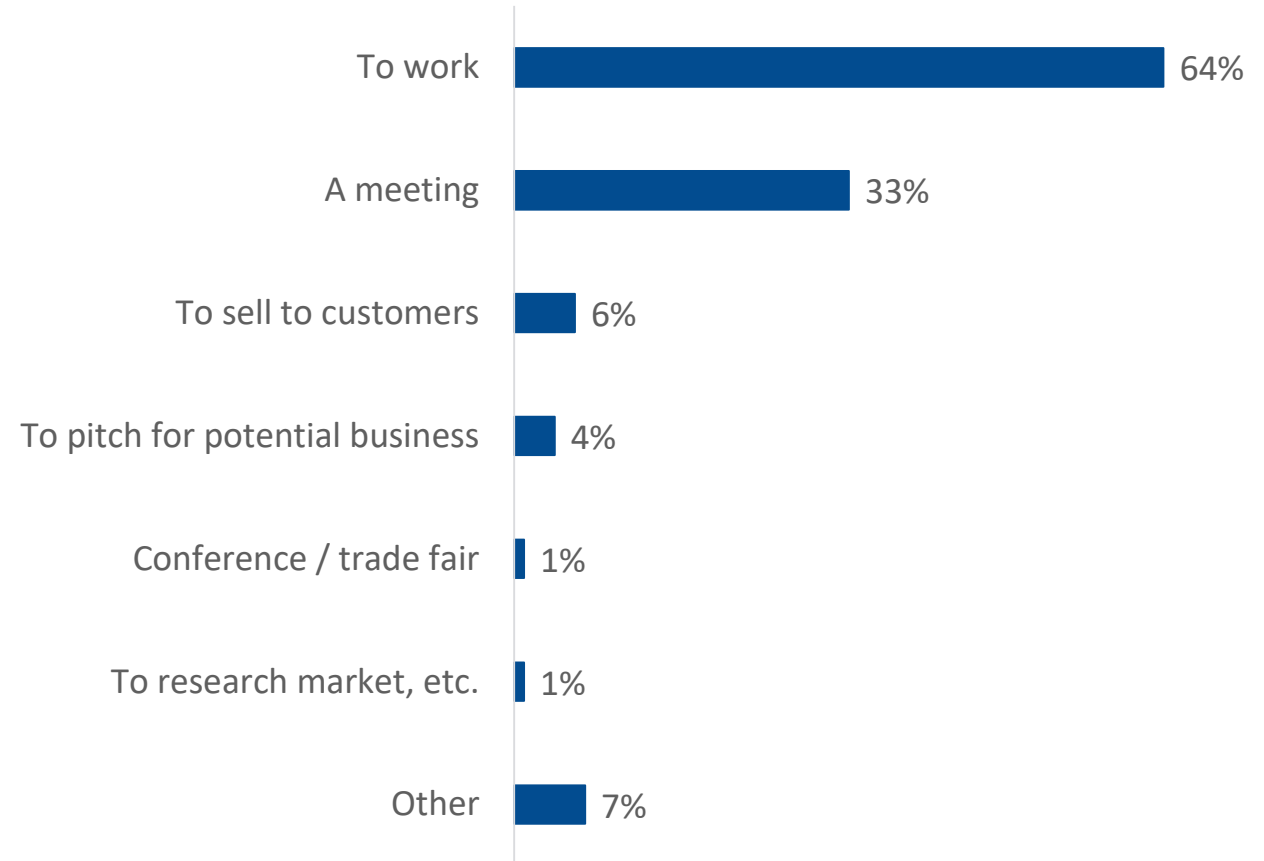
Base (All, excl. rotation shift workers): Total 1,146; Leisure 875; VFR 187; Business 75

Visitor journey

Business journey

- The largest proportion of Business visitors (64%) had been to Orkney to work. A further one third were attending a meeting.

Reason for visiting Orkney - Business

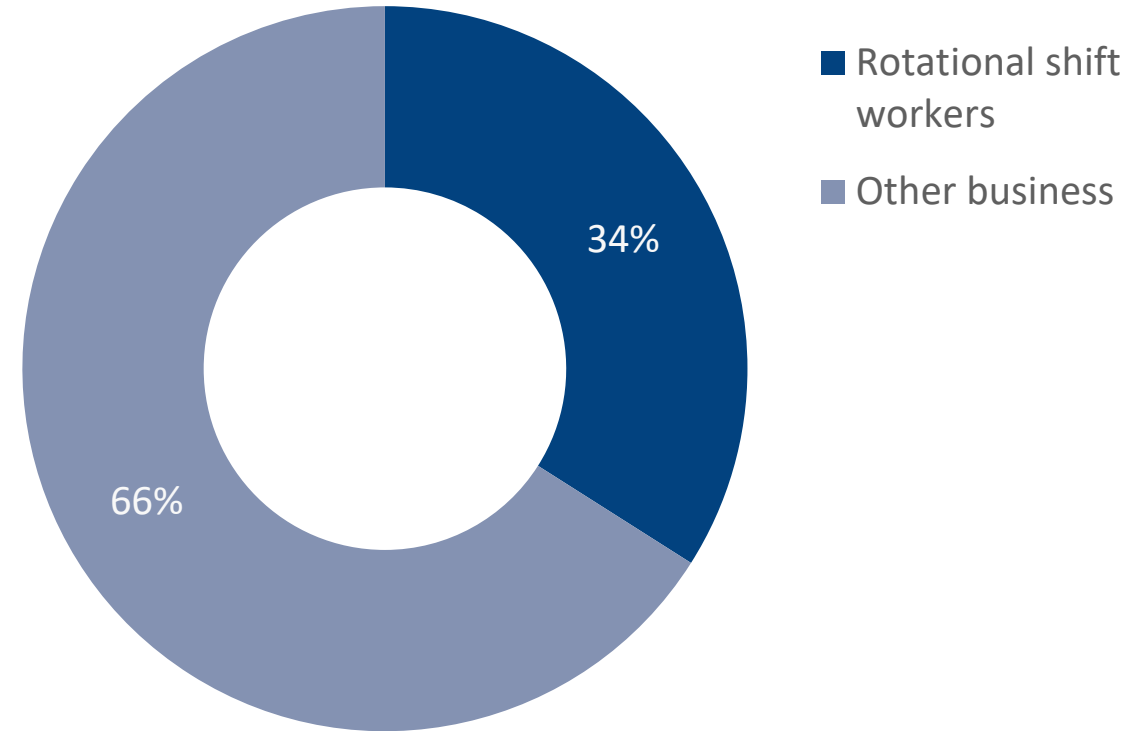


Visitor profile

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 third of business respondents stated that they were staying for a long period of time.
- This proportion is higher than in 2017 when 27% were classified as rotational shift workers.

Rotational shift workers



CQ6: 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?

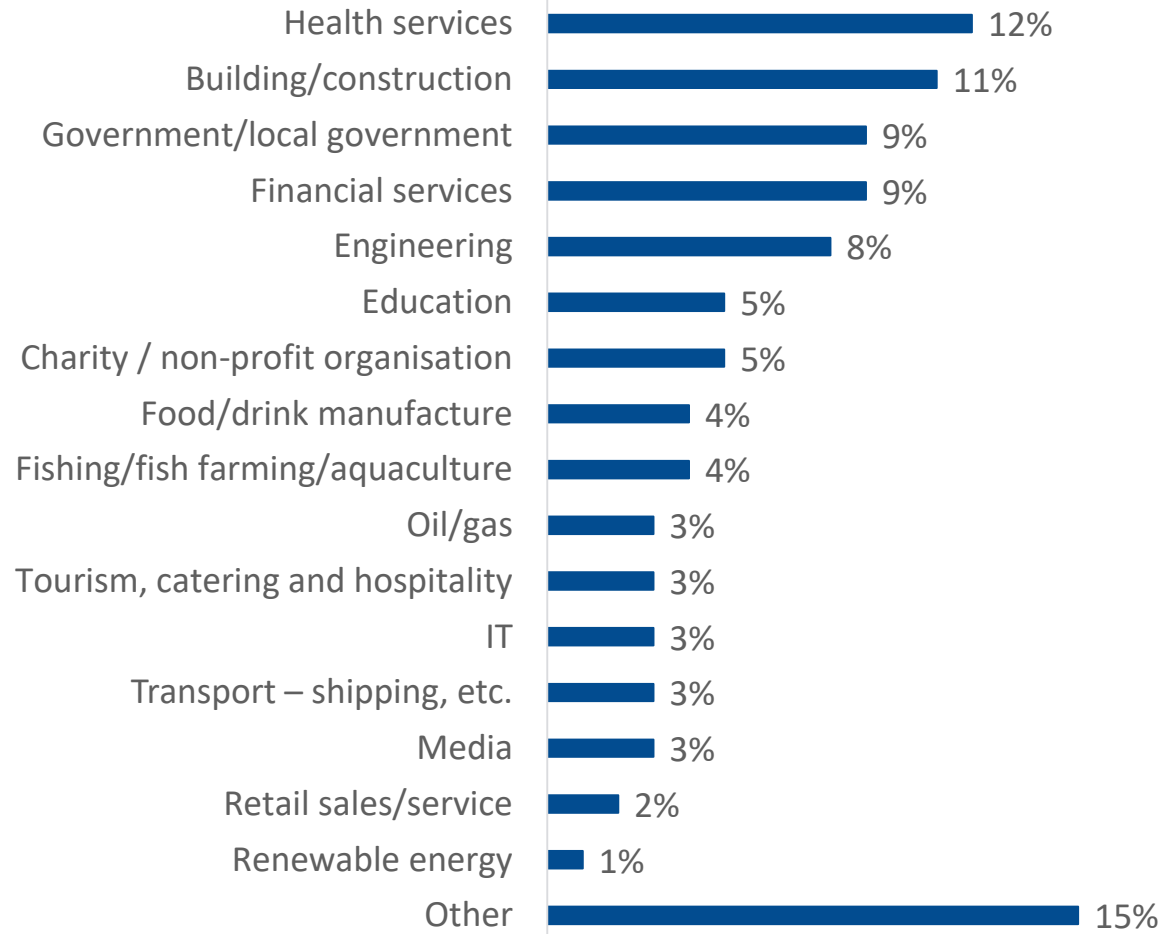
Base (All Business calibration): 533

Visitor profile

Business

- A wide range of business sectors were cited by Business visitors. The most prevalent were health services, building/construction, government/local government, financial services and engineering.
- 15% of business visitors (32 respondents) stated another sector not listed. These included entertainment/arts (7 respondents), property (2 respondents) and conservation (2 respondents).

Business sector



Base (All business): 116

Visitor profile

Summary



- As in 2017 the majority of visitors to Orkney in 2019 were visiting for leisure purposes (66%), while 16% were visiting friends and relatives and 16% were on a work/business trip.
- The profile of respondents was skewed to males (56%) and those aged 45 years or older (72%).
- A higher proportion of Business visitors were male (76%), compared to Leisure (54%) and VFR (46%) visitors.
- The majority of visitors (70%) come from the UK – with 42% from Scotland and 29% from the rest of the UK.
- Amongst Leisure visitors, 59% were from the UK (28% Scotland; 30% rest of UK). Overseas Leisure visitors were predominantly from Europe (22%), with many also visiting from North America (11%) and Australia/New Zealand (5%).
- Almost three quarters of Leisure visitors were visiting Orkney for the first time (71%).
- VFR (81%) and Business visitors (61%) were more likely to be repeat visitors to the islands though the number of first time Business visitors has increased to 39% (from 25% in 2017).



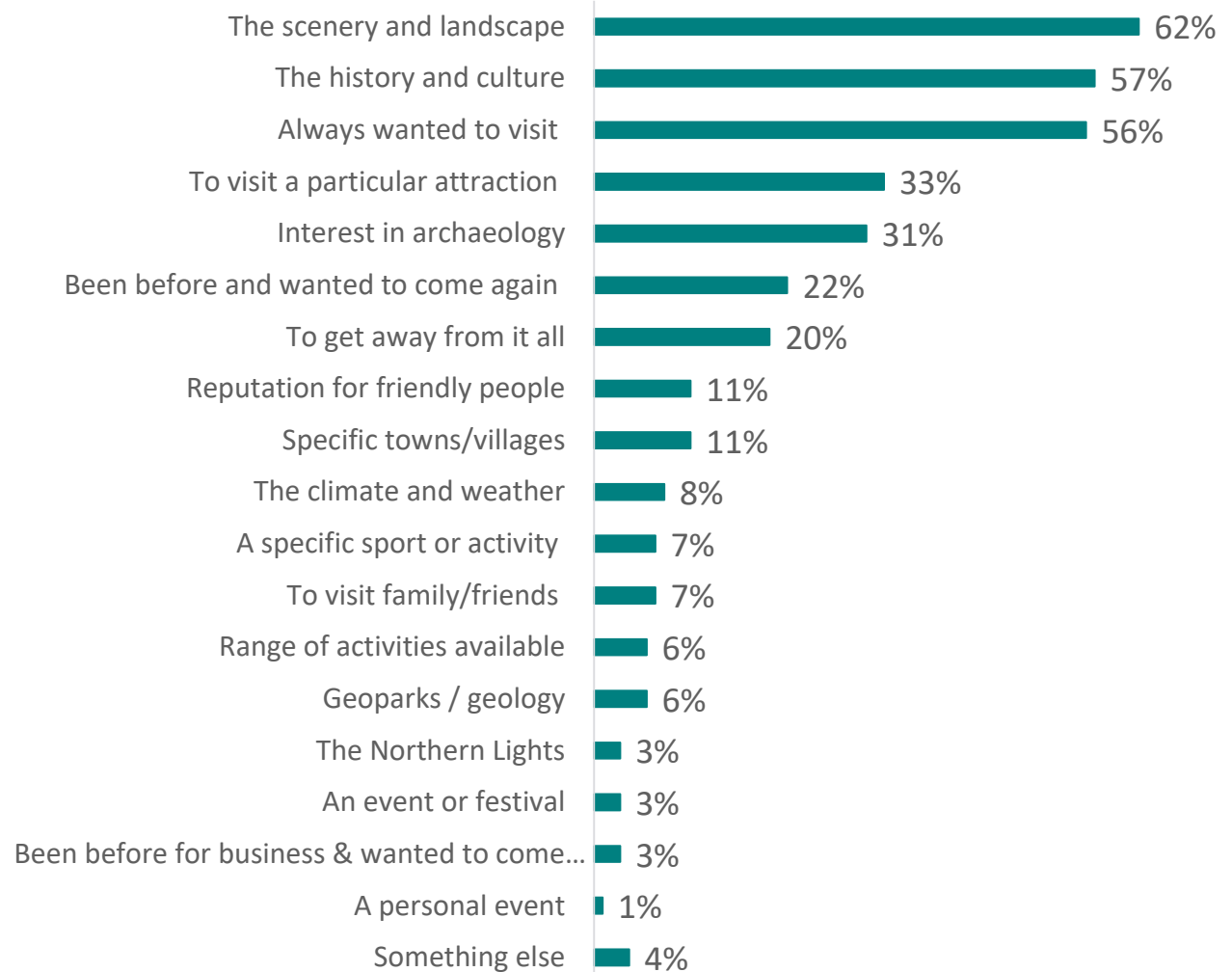
Visitor Journey

Visitor journey

Motivations

- The key reasons for visiting Orkney cited by Leisure visitors were the scenery and landscape (62%) and the history and culture (57%). Over half (56%) stated that they had 'always wanted' to visit Orkney.
- Archaeology and specific attractions were also key reasons for visiting – being mentioned by around one third of Leisure visitors.
- Leisure visitors from Scotland were more likely to say a main reason for visiting was having been before (40% said a previous holiday/short break was a reason and 7% a previous business trip). They were also more likely to cite the range of activities (11%) and attending an event or festival (7%).
- Getting away from it all was more often mentioned by visitors from Scotland (24%) or the rest of UK (26%) than Europe (15%) and those from North America or other overseas (both 11%). This suggests that getting away from it all is less of a motivation for overseas travellers.
- North American visitors (77%) were more likely to select history and culture and an interest in archaeology (50%) than those from other countries.
- Younger visitors (aged under 35 years) were more likely than the other age groups to state the scenery and landscape (76%) and getting away from it all (38%) as their reasons for visiting Orkney.

Reasons for visiting Orkney - Leisure visitors

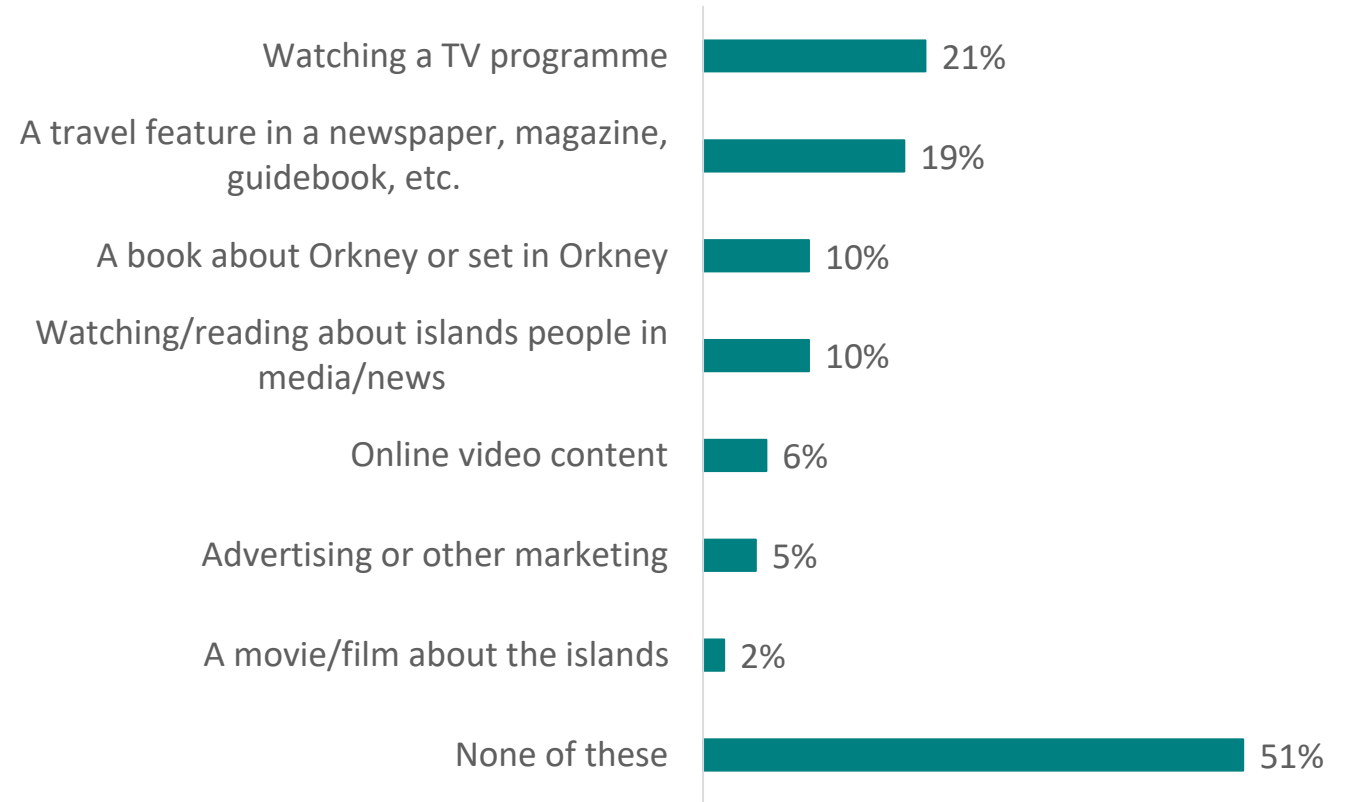


Visitor journey

Inspiration

- Approximately half of Leisure visitors (49%) reported that they had been inspired to visit Orkney by something they had seen or read. This closely corresponds to 2017 when 52% were similarly inspired.
- TV programmes were mentioned by 21% of Leisure respondents. These included Britain's Ancient Capital (and other various mentions of programmes by Neil Oliver), reports/programmes relating to Ness of Brodgar, Coast and Time Team.
- Books about Orkney were reported to have inspired 10% of Leisure visitors. These included The Outrun (Amy Liptrot), Ann Cleeves's books, as well as various historical books about Orkney and guide books, such as Lonely Planet and Rough Guide.
- Overseas visitors were more likely to be inspired by books, films, TV, etc. (55%) than those from Scotland (41%) or the rest of UK (45%).
- Younger respondents (36% of under 35s) were more likely to mention a travel feature than other age groups.
- 35% of North American visitors and 27% of European visitors mentioned being inspired by a travel feature. As might be expected, watching a TV programme was more inspirational to leisure visitors from Scotland (21%) and the rest of UK (28%) than those from overseas (17%).

Inspiration for visiting Orkney - Leisure visitors

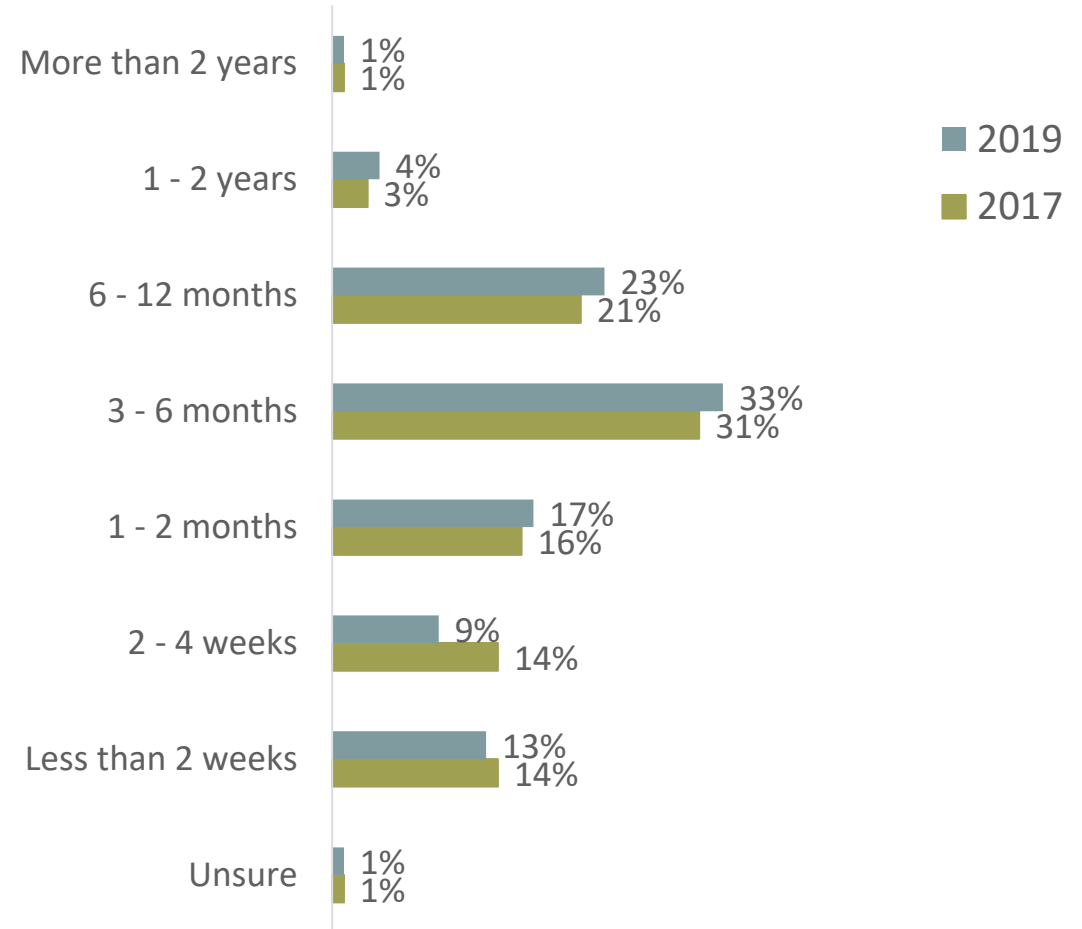


Visitor journey

Planning

- Across the total sample of all visitors in 2019 the majority (72%) planned their visit to Orkney within 6 months of travel.
- Just over one fifth of visitors (22%) planned their visit within one month of travel, suggesting that many people visited based on a fairly spontaneous decision.
- The pattern of travel planning closely replicates the findings from 2017 when 75% booked within 6 months. However, there is some evidence of more advance planning in 2019, with fewer planning within 2 months (39%) than in 2017 (44%).
- 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 overleaf.

How far in advance did you plan your trip?



Base (All except rotational shift workers) 2019: 1,146, 2017: 1,295

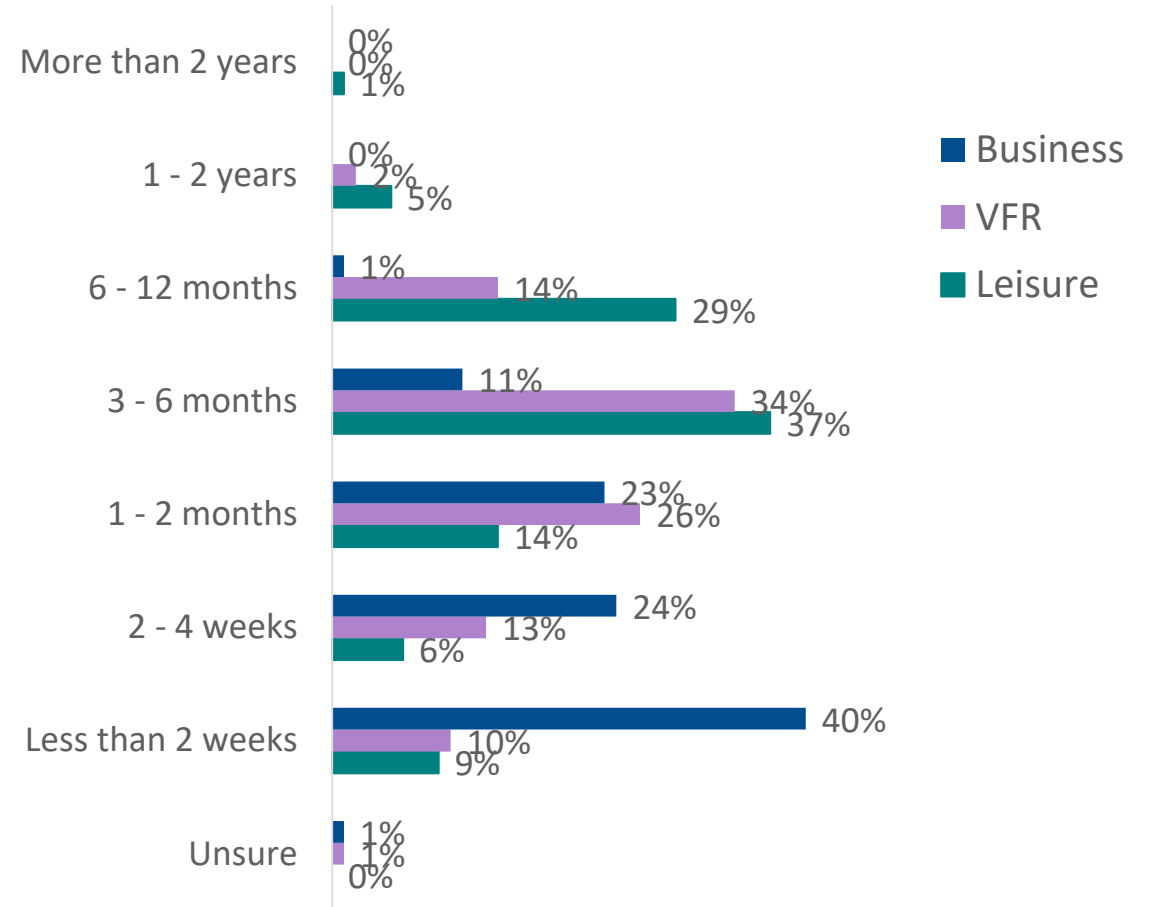
Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

Visitor journey

Planning

- Leisure visitors showed the highest levels of advance planning – more than one third (35%) planned more than 6 months before their visit and 37% started their planning 3 to 6 months in advance.
- VFR visitors demonstrated slightly less advance planning than Leisure visitors – 60% planned their trip 1 to 6 months before travel and 23% planned it within a month. This differs from the findings reported in 2017 when 45% of VFR visitors planned 1 to 6 months in advance and 42% planned their trip less than a month in advance.
- As we might expect, Business visitors had the lowest levels of advance planning. Indeed, 65% of Business visitors started planning their trip within one month of travel.

How far in advance did you plan your trip? – by visitor type



Base (All except rotational shift workers):
Leisure 875; VFR 187; Business 75

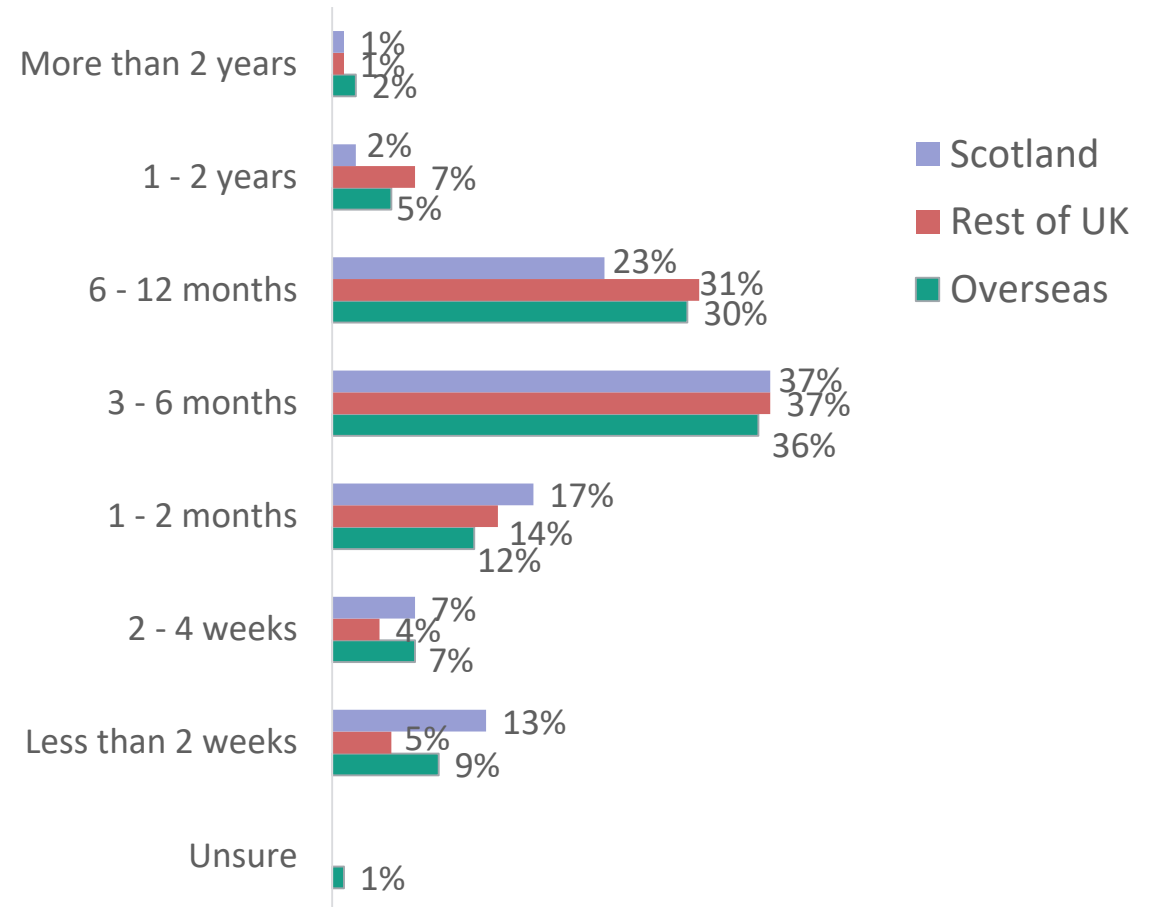
Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

Visitor journey

Planning

- Leisure visitors from Scotland were the most likely to start planning within two months of travel (37%).
- Visitors from the rest of the UK and overseas showed a very similar pattern of response; most planned their trip at least 3 months in advance – rest of UK visitors (76%) and overseas visitors (72%).
- Leisure visitors from North America (46%) and other overseas (54%) were the most likely to plan more than 6 months in advance. Those from North America were also the least likely to plan trips at short notice (3% planned less than 2 weeks ahead). This was followed by visitors from the UK outside Scotland of which 5% had started planning within 2 weeks of their trip (compared to 12% of those from Europe and 13% of those from Scotland).

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



Base (All except rotational shift workers):
Scotland 235; rest of UK 300; overseas 344

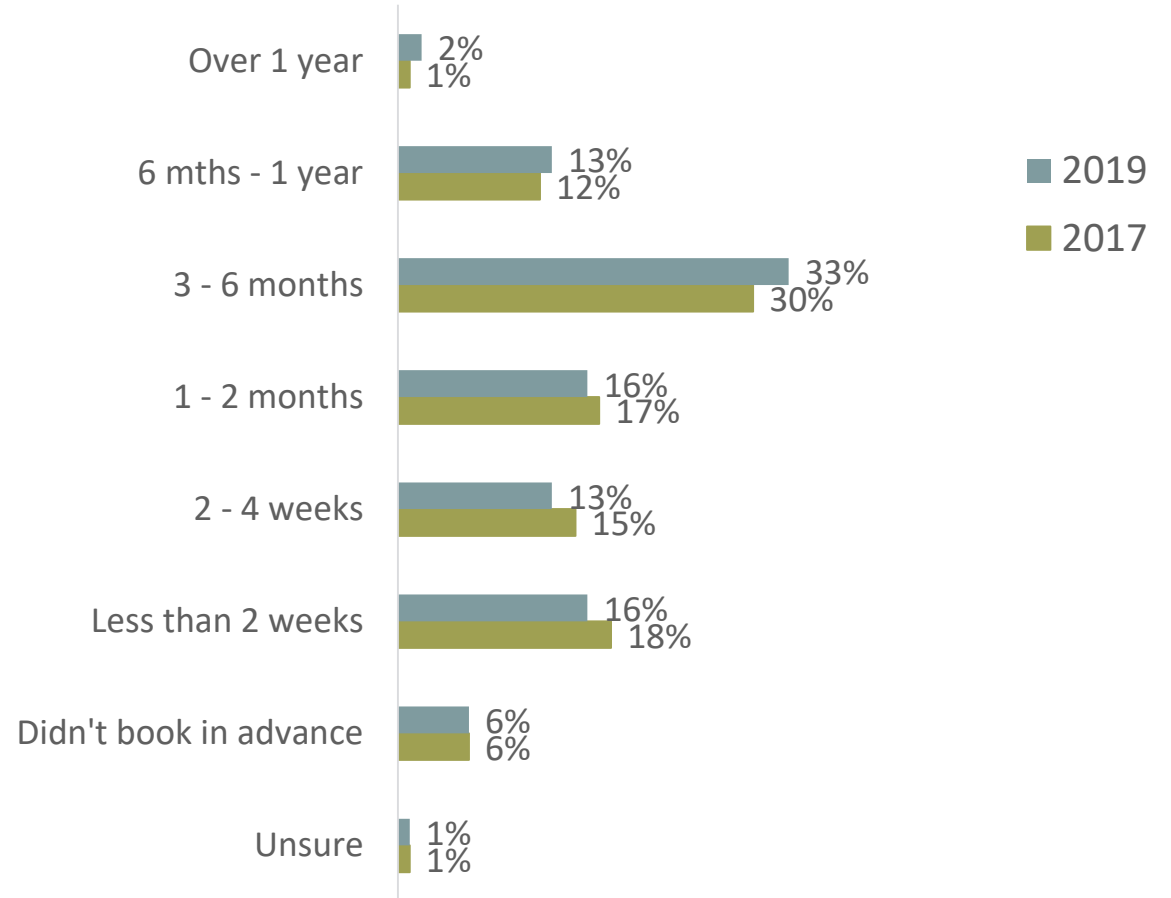
Q4: How far in advance did you start planning your trip? I.e. how much time was there between you starting to plan and actually visiting?

Visitor journey

Booking

- As we found in 2017, the pattern of data in terms of booking the trip was very similar to planning – the majority overall (84%) booked within 6 months or did not book at all.
- However, although 27% planned their trip more than 6 months before travel, only 15% 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.

How far in advance did you book your trip?



Base (All except rotational shift workers) 2019: 1,146, 2017: 1,295

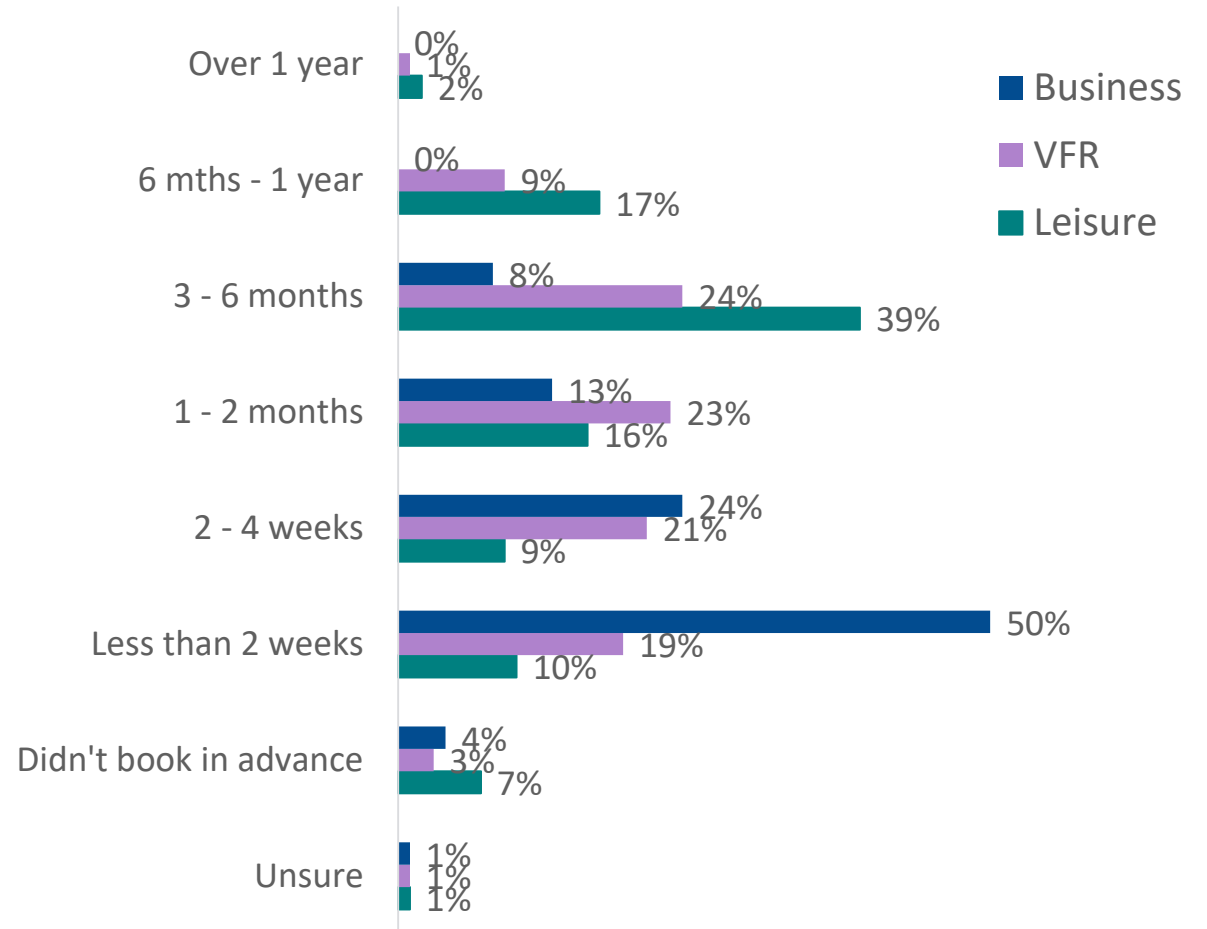
Q5: How far in advance did you book your trip? I.e. how much time was there between booking the trip and going?

Visitor journey

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 – 58% booked more than 3 months before visiting.
- Business visitors were the most likely to book within one month of travel or to not book at all – 77% of Business visitors.
- The sample of VFR visitors was more split between advance planners and spontaneous travellers – 42% booked within a month or did not book at all, 23% booked 1 to 2 months in advance and 34% booked ahead by 3 months or more.

How far in advance did you book your trip? – by visitor type



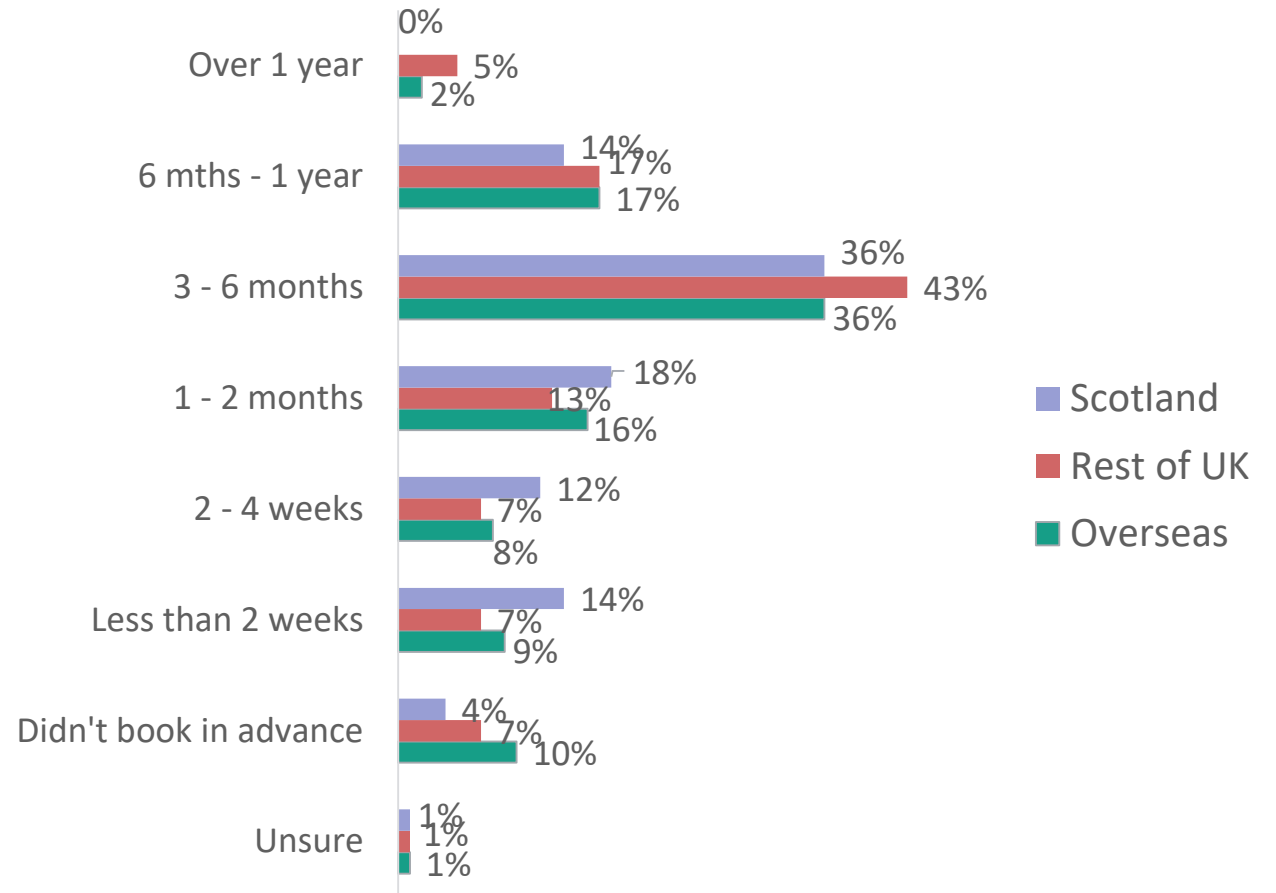
Base (All except rotational shift workers):
Leisure 875; VFR 187; Business 75

Visitor journey

Booking

- For all visitor types the typical timing of booking was 3 to 6 months before the trip.
- Visitors from Scotland were more likely to book within a month of travel (26%) than those from the rest of the UK (14%) or overseas (18%).
- The booking patterns for visitors from each location were similar to 2017, although fewer overseas visitors booked 3 to 6 months in advance in 2019 (36%) than in 2017 (42%).

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



Base (All except rotational shift workers):
Scotland 235; rest of UK 300; overseas 344

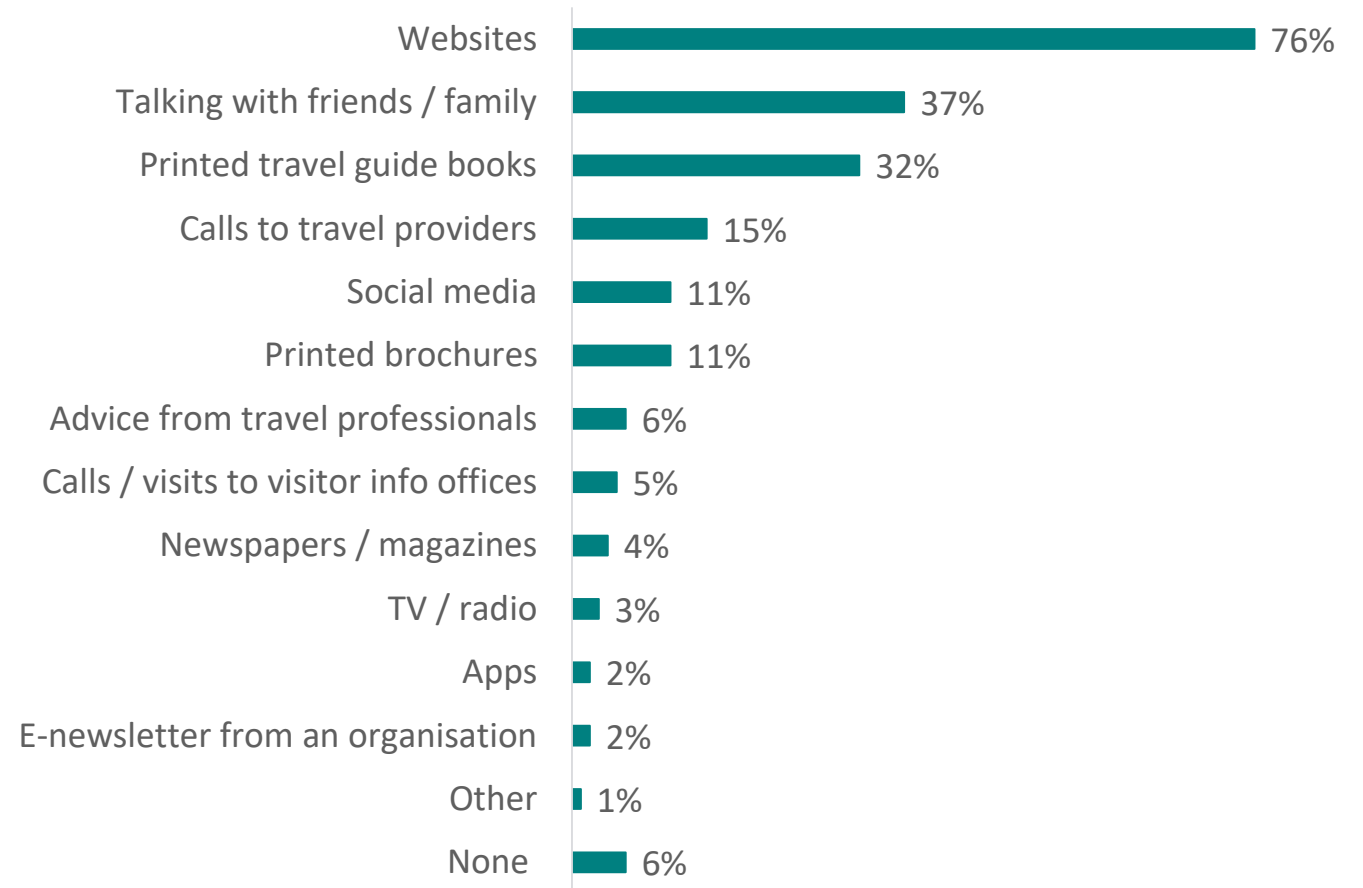
Q5: How far in advance did you book your trip? I.e. how much time was there between booking the trip and going?

Visitor journey

Sources of information

- Websites were the key source of information for Leisure visitors when planning their trip, mentioned by 76% of all Leisure visitors. Word of mouth was also critical, with 37% citing family and friends.
- Despite the reliance on online sources for many, printed travel guide books were also a popular source of information, mentioned by one third of Leisure visitors.
- Travel professionals/providers were less likely to be mentioned than sources used independently by visitors – 15% cited calls to travel providers, 5% used visitor information offices and 6% took advice from travel professionals.
- Social media was mentioned by 11% of visitors, while 2% mentioned apps, including Booking.com, Tripadvisor, Historic Scotland, Airbnb, Google maps and NorthLink Ferries. Social media was mentioned by one in five (20%) of those aged under 55 years old.
- The sources of information used by visitors in 2019 were very similar to those mentioned in 2017; however there was a higher proportion of Leisure visitors mentioning social media in 2019 (11%) than in 2017 (6%).
- Over 65 year olds were less likely than those in younger age groups to use social media and websites to look for information about Orkney, although websites was still the top answer for the over 65s (66% used this).

Sources of information during planning - Leisure visitors

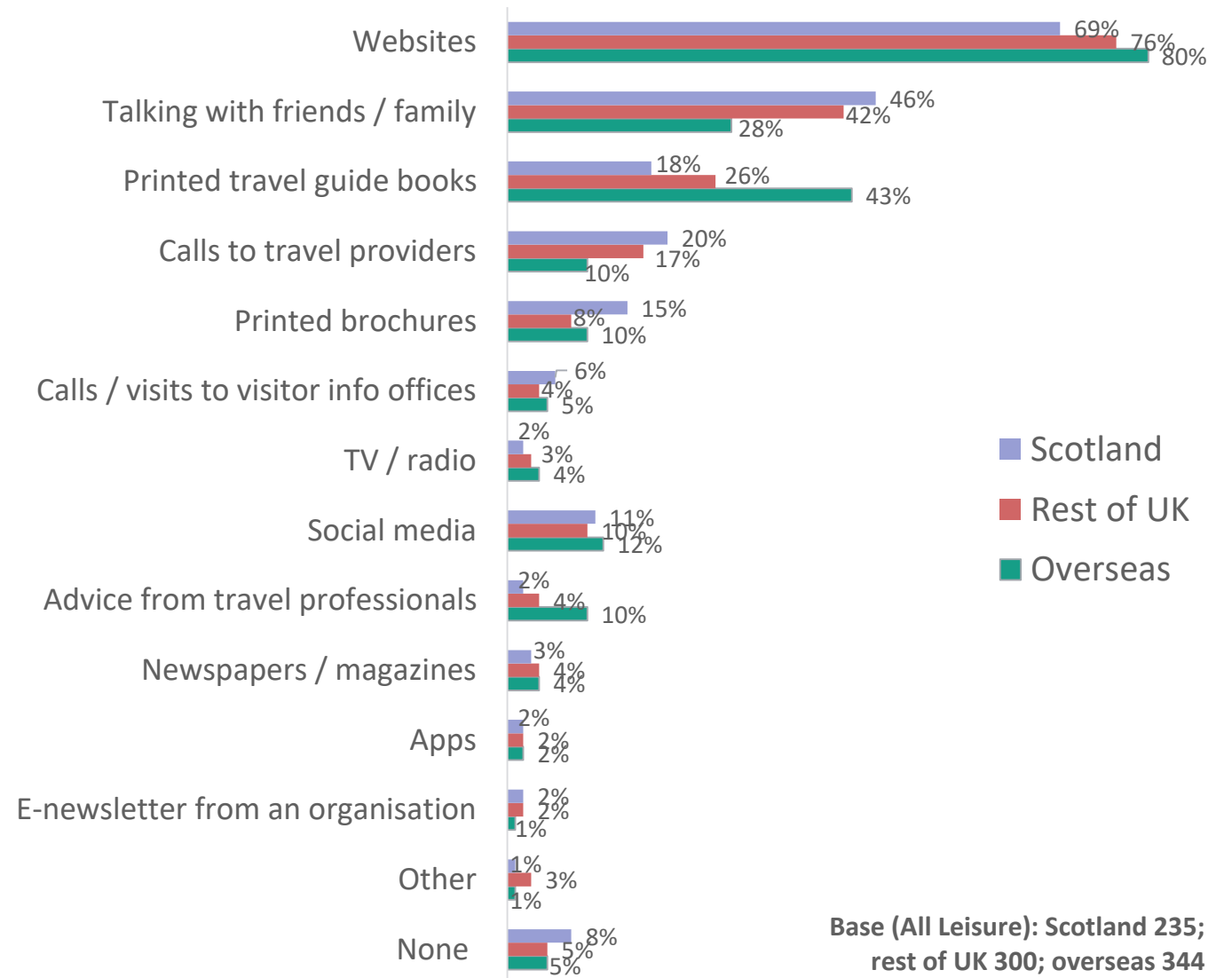


Visitor journey

Sources of information

- 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 (18%) or the rest of the UK (26%).
- Overseas visitors were also more likely to take advice from travel professionals (10%) than those from Scotland (2%) or the rest of the UK (4%).
- Visitors from Scotland and the rest of the UK were more likely to talk to friends and family (46% and 42% respectively) than those from overseas (28%).
- Social media usage was significantly higher for visitors from North America (20%) than visitors from any other country.

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



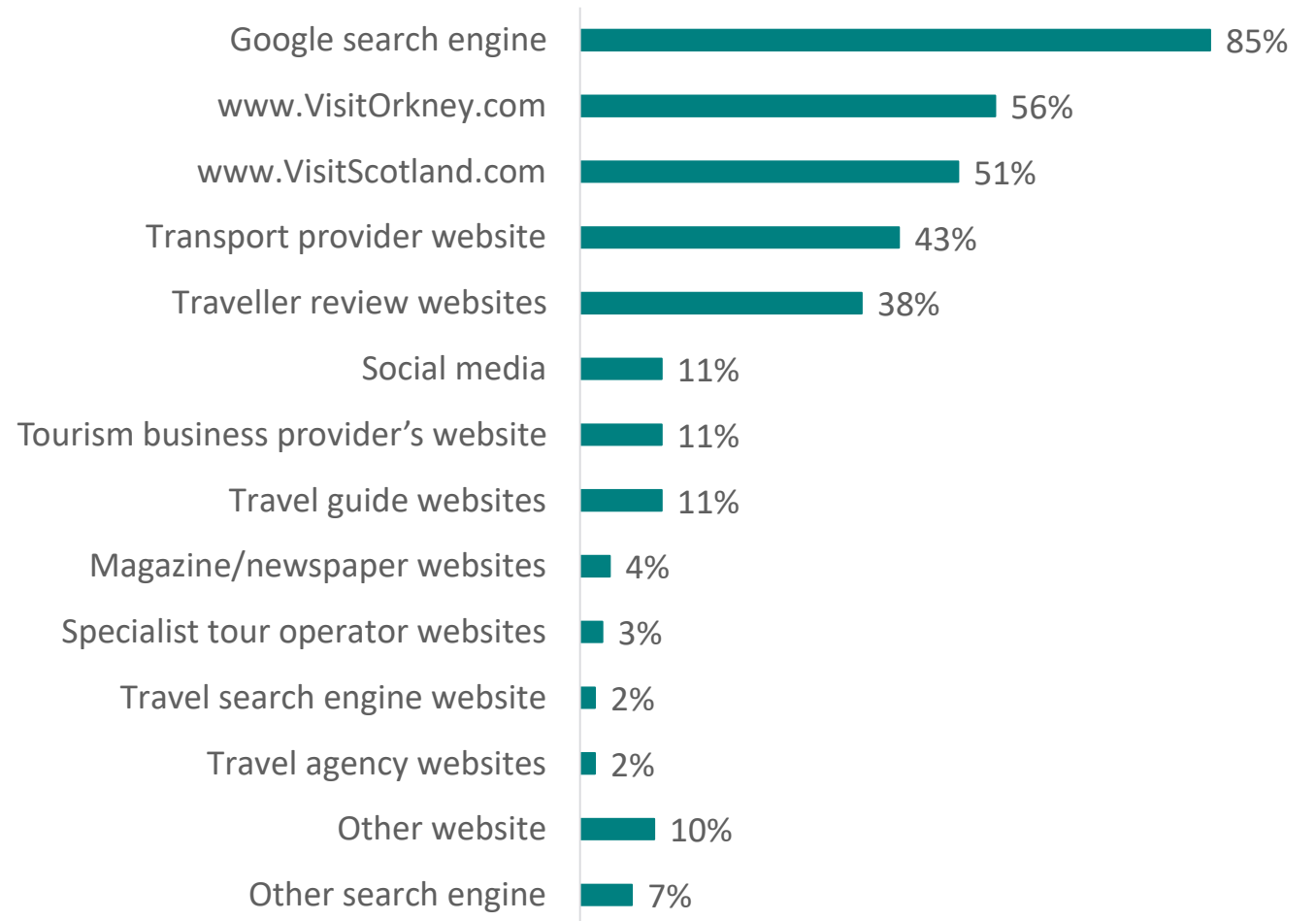
Q6: Which of the following sources of information did you use when planning your visit to Orkney?

Visitor journey

Sources of information

- Leisure visitors who had sought information online were asked which websites or search engines they had used. The majority (85%) reported using the Google search engine as a starting point.
- The two key tourism websites cited were VisitOrkney.com (56%) and VisitScotland.com (51%).
- A significant proportion (43%) also reported using transport providers' websites, whilst 38% looked at traveller review websites.
- There has been a slight decrease in mentions of VisitOrkney.com compared to 2017 (63%), while those citing social media has increased (7% in 2017).

Websites and search engines used - Leisure visitors



Base (Leisure who used online info): 665

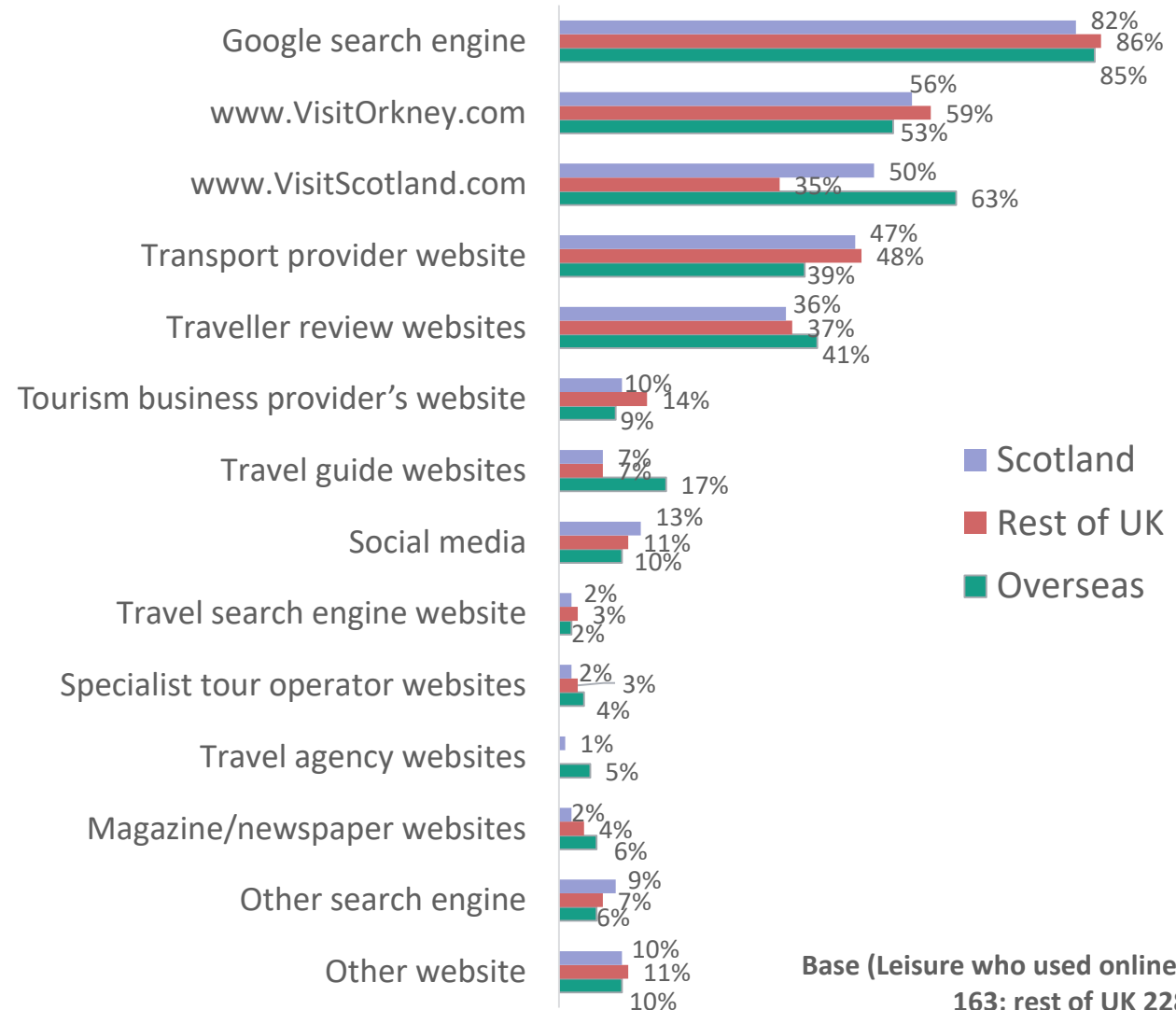
Q8: What types of websites or search engines did you use when planning your visit to Orkney? Please think only about information gathering during planning your trip rather than booking the trip.

Visitor journey

Sources of information

- Using Google was the most popular search engine used by all Leisure visitors whether from Scotland, the rest of the UK or overseas.
- VisitScotland.com was more likely to be used by overseas visitors (63%) than Scotland (50%) or rest of UK visitors (35%). In particular, a high proportion of Europeans (68%) used the site.
- A higher proportion of overseas visitors also used travel guide websites (17%), compared to Scotland (7%) and rest of UK (7%) visitors.

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



Base (Leisure who used online info): Scotland 163; rest of UK 228; overseas 276

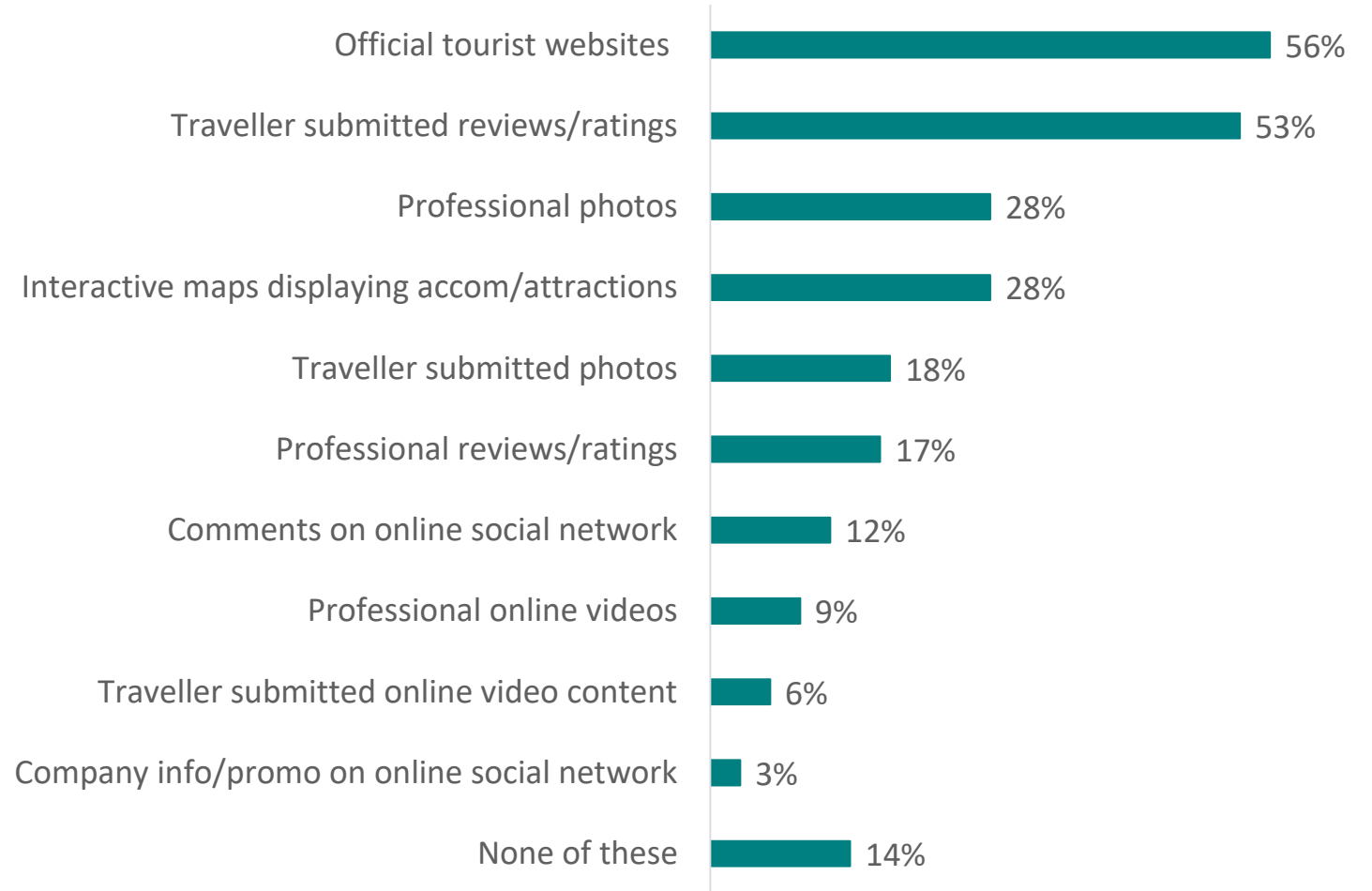
Q8: What types of websites or search engines did you use when planning your visit to Orkney? Please think only about information gathering during planning your trip rather than booking the trip.

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.
- Traveller reviews were also an important source of information; also mentioned by more than half of Leisure visitors who used online information. Almost one fifth of these respondents also reported looking at traveller submitted photos online.
- Almost three in ten of Leisure visitors who used online sources also reported looking at professional photos or interactive maps.
- These findings very closely match the findings from the 2017 survey indicating that the sources of information that visitors turn to have remained unchanged.

Online information used - Leisure visitors



Base (Leisure who used online info): 665

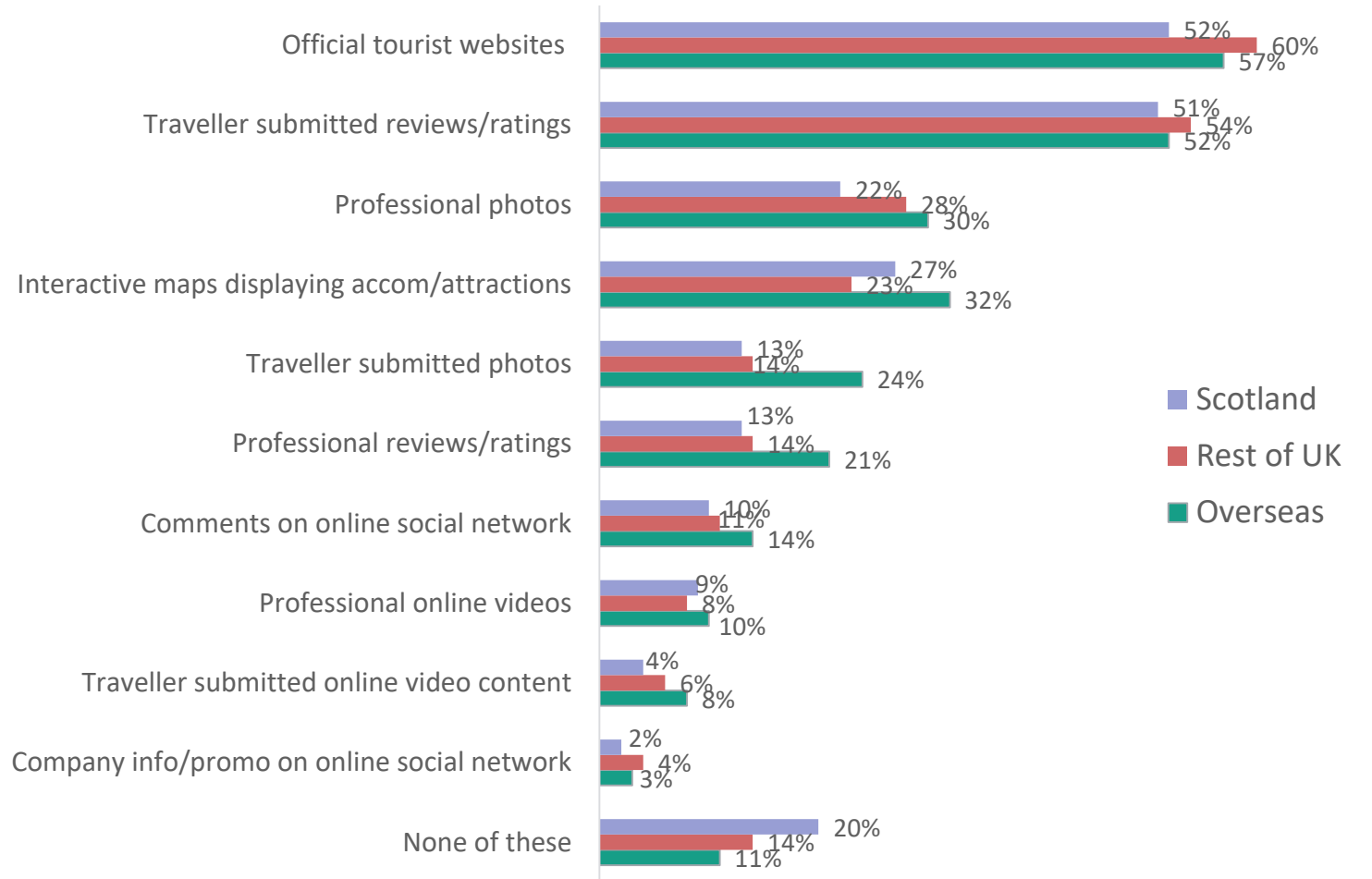
Visitor journey

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.
- Visitors from overseas were more likely to look at traveller submitted photos (24%) and professional reviews (21%) than visitors from Scotland or the rest of the UK.
- Visitors from North America were especially interested in traveller reviews (66%), professional reviews (28%) and professional photos (41%) compared to people from other regions.



Online information used - by market (Leisure only)



Base (Leisure who used online info): Scotland 163; rest of UK 228; overseas 276

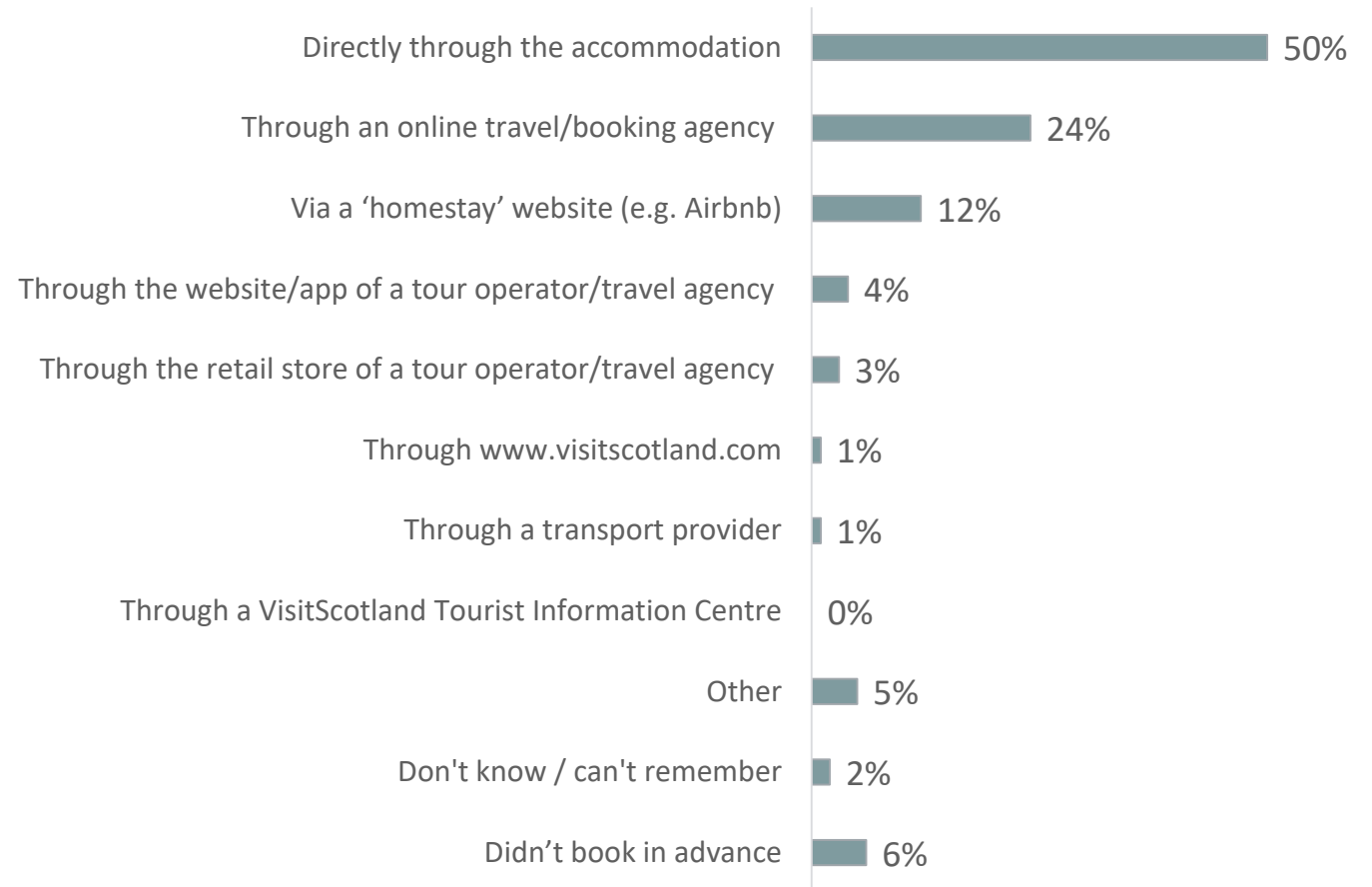
Q9: Which of the following types of online information did you use when planning your visit to Orkney?

Visitor journey

Booking

- All visitors who stayed in paid for accommodation were asked how they booked. Half reported that they booked directly with the accommodation provider, while a further 24% booked via a online travel/booking agency.
- Direct bookings with accommodation providers have remained consistent with 2017, however there has been an increase in bookings via online travel/booking agencies (16% in 2017).
- The next most prevalent source of booking was 'homestay' websites such as Airbnb, mentioned by 12%. The proportion using this booking method has doubled since 2017 when 6% cited it.
- In 2019 only 6% of visitors did not book their accommodation in advance. This is a decline since 2017 when 15% didn't book before travel and perhaps indicates higher demand for accommodation on the islands.

Method of booking accommodation



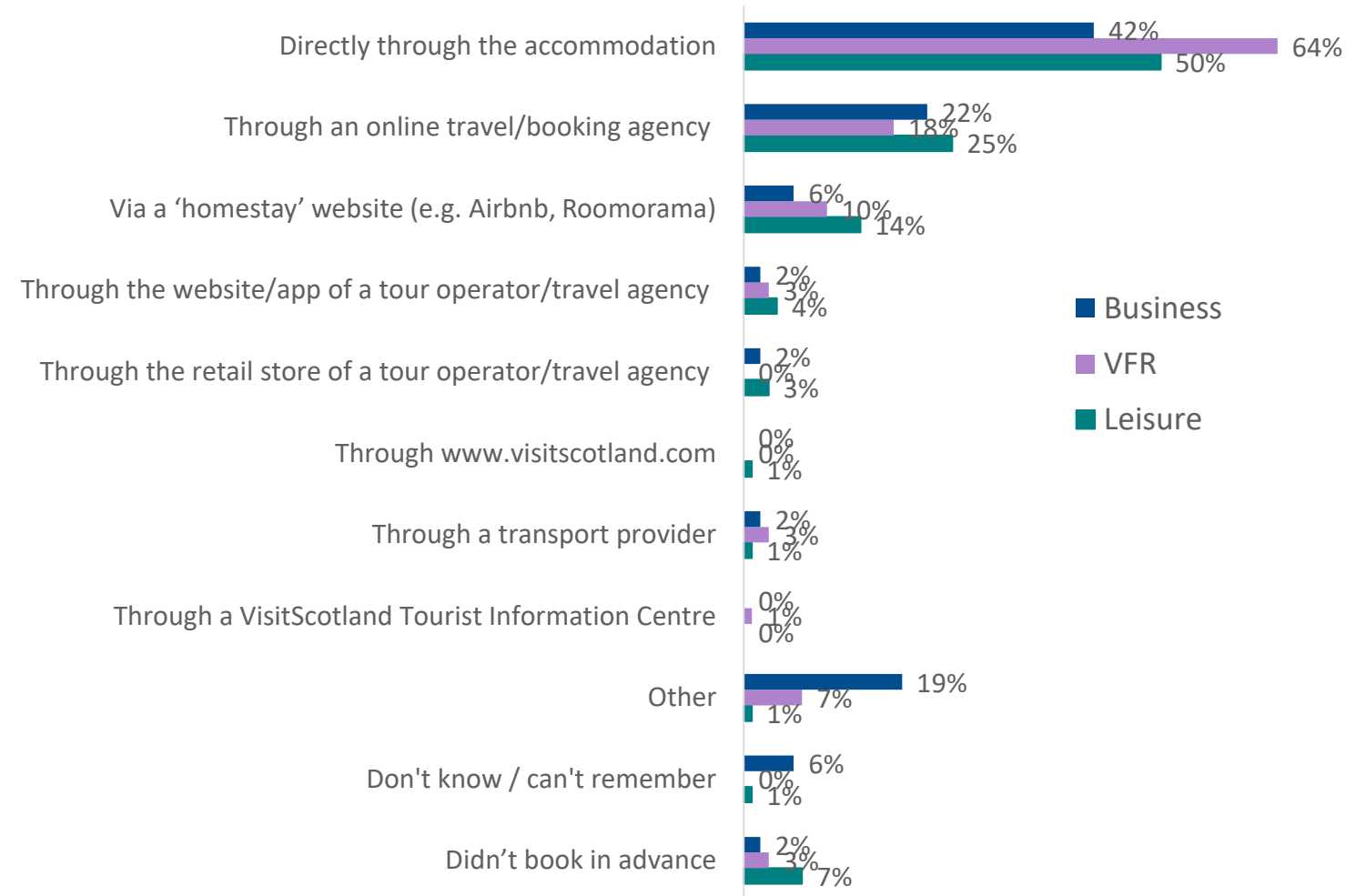
Base (All who stayed in paid accommodation): 925

Visitor journey

Booking

- Half of Leisure visitors reported booking their accommodation directly with the provider, while one quarter booked via an online travel agent.
- VFR visitors were the most likely to book directly with the accommodation provider - 64%.
- 'Homestay' websites were mentioned by 14% of Leisure visitors, which is double the proportion mentioning this in 2017 (7%).
- A high proportion (19%) of Business visitors mentioned other methods of booking their accommodation. Most of these respondents cited booking through their employer's admin or travel department, or via an agent working for their employer.
- Amongst Leisure visitors, older visitors were more likely to have booked directly through their accommodation – 54% of those aged 55+ booked this way which compared to 32% of those under 34. Younger age groups were more likely to use homestay providers (22% of under 45s) than those in older age groups (10% of over 55s).
- Scotland (63%) and rest of UK (57%) Leisure visitors were more likely to book directly with the accommodation provider than overseas visitors (38%). A higher proportion of visitors from Europe (33%) and other overseas excluding North America (39%) booked through an online travel agent. Homestay bookings were particularly popular with North Americans (27%).

Method of booking accommodation - Visitors type



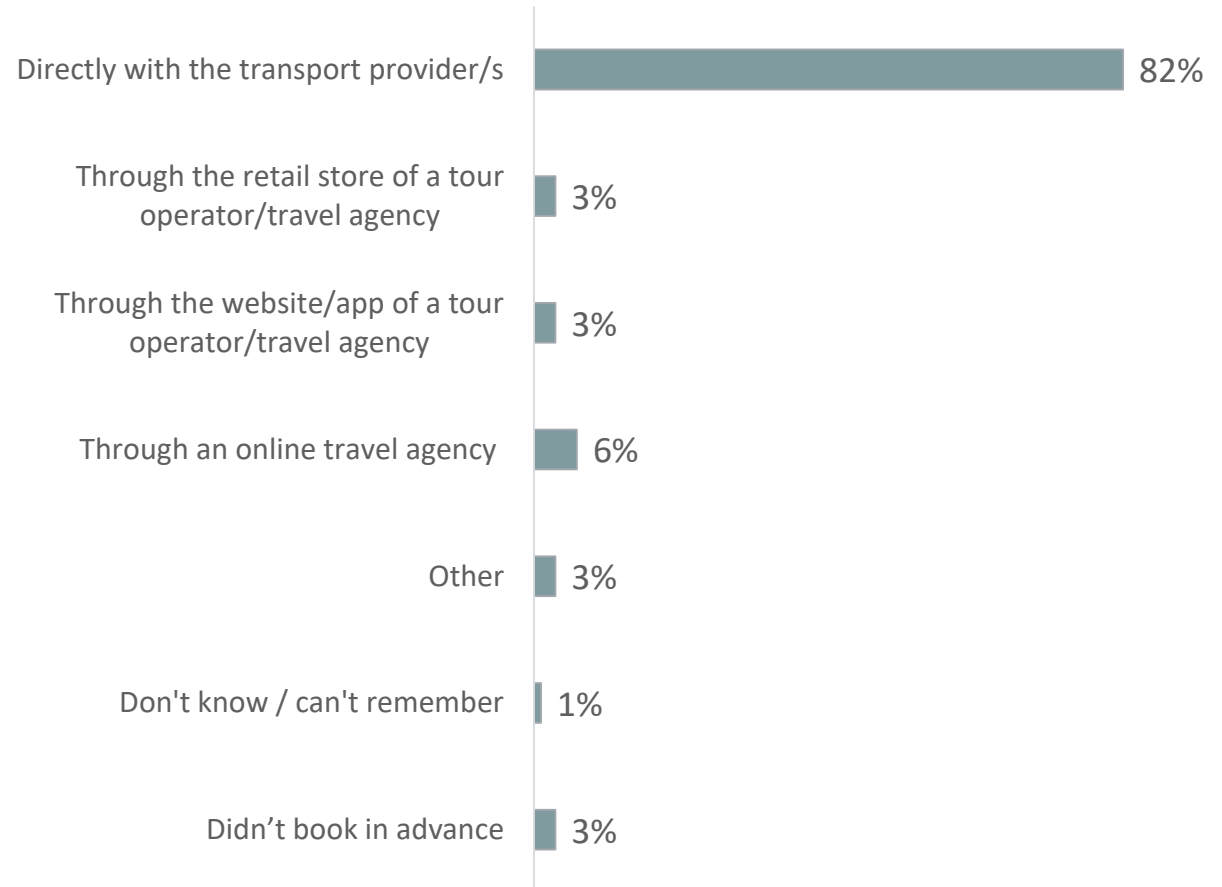
Base (all staying in paid accommodation) Leisure: 759, VFR: 72, Business: 87

Visitor journey

Booking

- Over four fifths of visitors (82%) reported that their transport to Orkney was booked directly with the transport provider.
- Direct bookings with transport providers were particularly high amongst VFR (93%) and Leisure visitors (84%). Business visitors were less likely to book directly (63%) although for this group it was still the primary transport booking method.
- A number of Business visitors mentioned other methods of booking their transport (15%) – typically this was booking via their employer or via an agent working on behalf of their employer.

Method of booking transport



Visitor journey

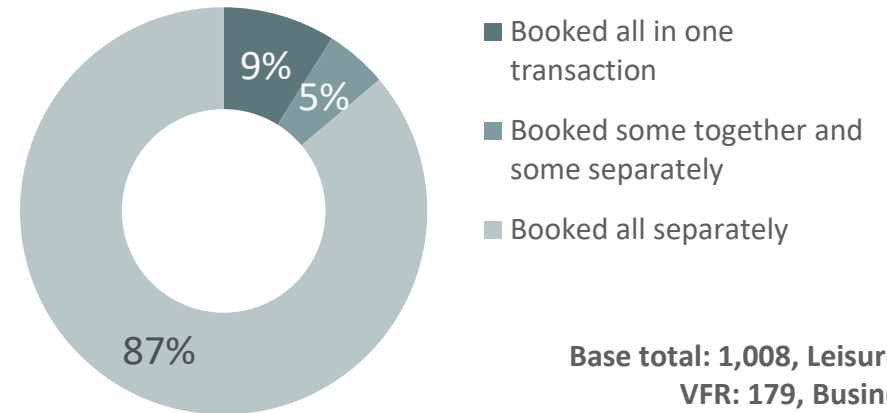
Booking

- Almost one in ten visitors overall reported that they booked their accommodation and travel to Orkney together in one transaction, while the majority (87%) booked these separately.
- Independent travel was prevalent across all visitor types. Leisure visitors were the least likely to book their travel and accommodation in one transaction – 7%, compared to 12% of VFR visitors and 13% of Business visitors.
- Overseas Leisure visitors were more likely to book a package (11%) than those from Scotland (3%) or the rest of the UK (4%).

Did you book accommodation and travel in one transaction?

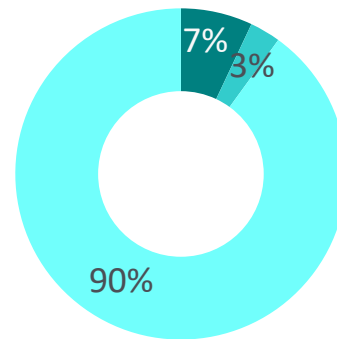


All visitors



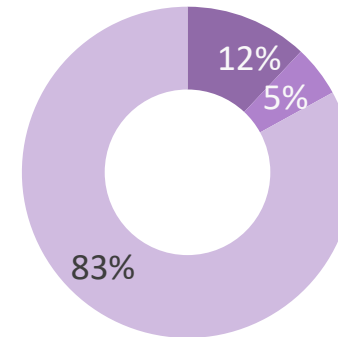
Base total: 1,008, Leisure: 733, VFR: 179, Business: 87

Leisure



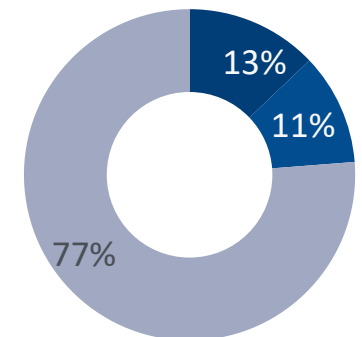
- One transaction
- Mix
- Separate transactions

VFR



- One transaction
- Mix
- Separate transactions

Business



- One transaction
- Mix
- Separate transactions

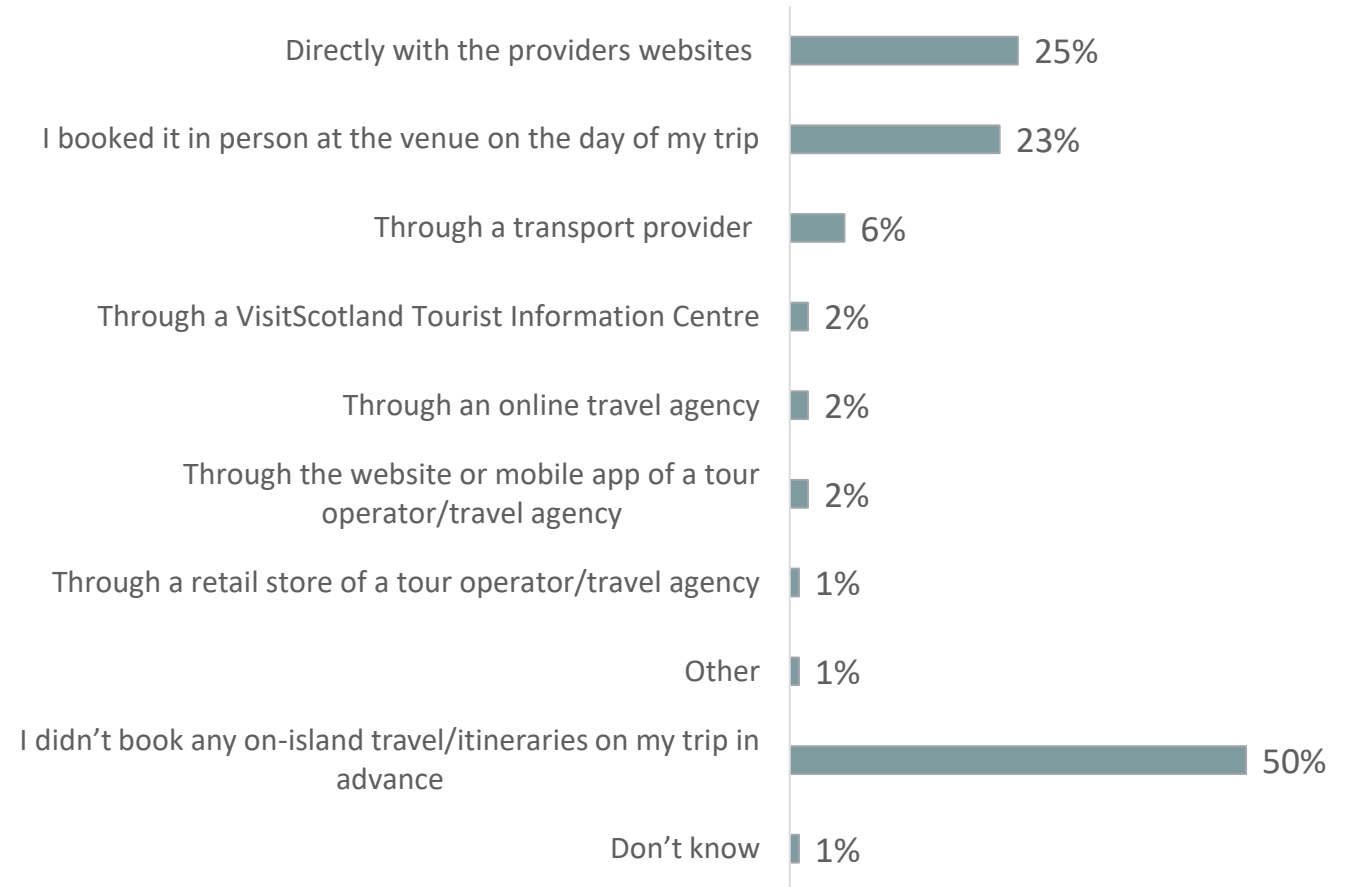
Q26: Did you book your travel and accommodation together in one transaction or separately in more than one transaction?

Visitor journey

Booking

- Approximately half of Leisure and VFR visitors reported that they booked activities or on-island travel. The most common way of doing this was directly on providers websites or in person at the venue on the day.
- Leisure visitors were more likely to book activities or on-islands transport (54%) than VFR visitors (29%).

Method of booking itinerary – Leisure and VFR visitors



Base (All Leisure and VFR visitors): 1,066

Q27: How did you book your itinerary *within* Orkney? (by itinerary we mean your on-island travel, attractions visits and activities conducted within Orkney)

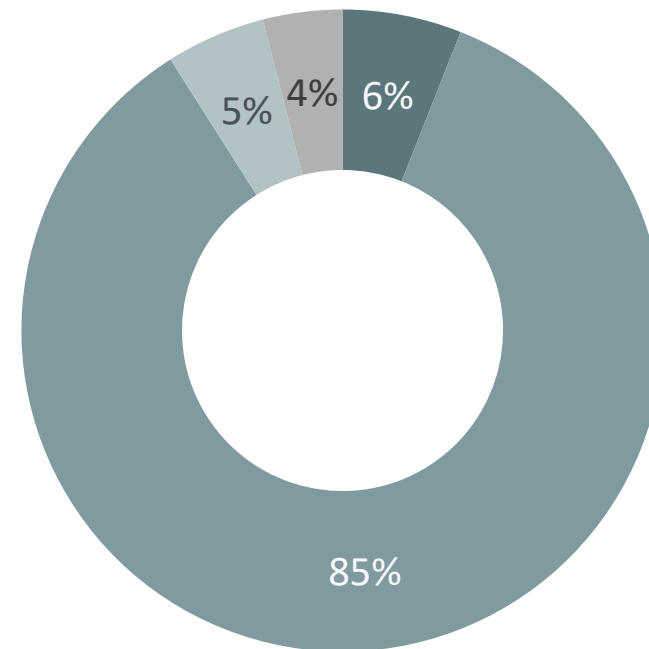
Visitor journey

Booking

- The majority of visitors who booked activities or on-island travel (85%) did this separately to their accommodation and travel to Orkney bookings.
- This finding was consistent across Leisure (85%) and VFR (83%) visitors.
- Overseas Leisure visitors were less likely to book their itinerary within Orkney separately to their accommodation and travel (75%) than those from Scotland (97%) or the rest of the UK (90%).

Q28: And was your itinerary *within* Orkney booked ... ?

Was your itinerary booked ...? - Leisure and VFR visitors



- In same transaction as your accom or travel
- Separately to your accom and travel
- Some booked in same transaction, some separately
- Don't know


Base (Leisure/VFR visitors who booked activities or on-islands travel): 328

Visitor journey

Summary



- The key reasons given for visiting Orkney for Leisure visitors were the scenery and landscape, the history/culture and it being a place visitors had always wanted to come to.
- Half of Leisure visitors also reported that something they had seen or read had helped inspire their visit – TV programmes (21%) and travel features in newspapers etc. (19%) were the main sources of inspiration cited.
- Online sources were key information sources for Leisure visitors during the planning and booking process. Visitors tended to use a combination of websites and search engines, with Google, VisitOrkney and VisitScotland websites used by over half of those who'd been online as part of the booking and/or planning of their trip.
- Official tourist websites (56%) and traveller submitted reviews/ratings (53%) were the most used types of online information amongst Leisure visitors.
- The use of social media as an information source during the planning and booking process has increased to 11% since 2017 (when 6% had used this source), with visitors from North America reporting the highest use (20%).
- As with 2017, the majority in 2019 booked their transport and accommodation independently directly with providers, rather than booking packages or using agents.
- The proportion of bookings via online travel agents increased in 2019 compared to 2017 – from 16% up to 24%. 'Homestay' accommodation bookings (such as Airbnb) also increased, doubling to 12% since 2017 (6%), with those aged under 45 and visitors from North America particularly likely to have booked this type of accommodation.



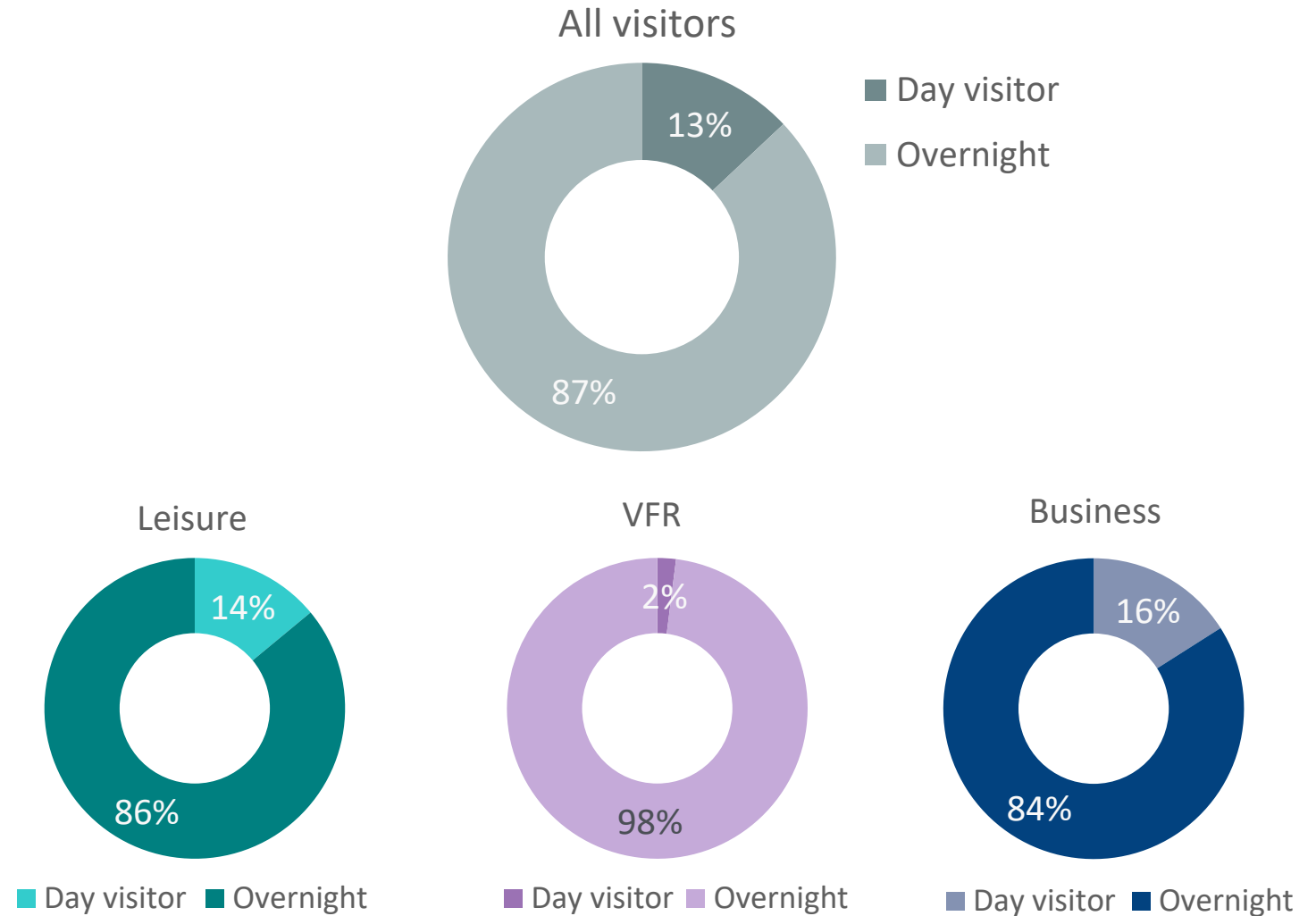
Trip profile

Trip Profile

Day vs overnight

- The majority of visitors to Orkney in 2019 were overnight visitors (87%). This proportion is consistent with 2017 when 89% of visitors were staying at least one night.
- VFR visitors were more likely to stay for one or more nights (98%) than Leisure (86%) or Business (84%) visitors.
- The proportion of day visitors in 2019 is slightly higher than in 2017 (10%), however, this may be due to issues with sampling at Burwick in 2017 which meant that those visiting for day trips, particularly on bus tours, were under-represented.

Day visitor or staying overnight



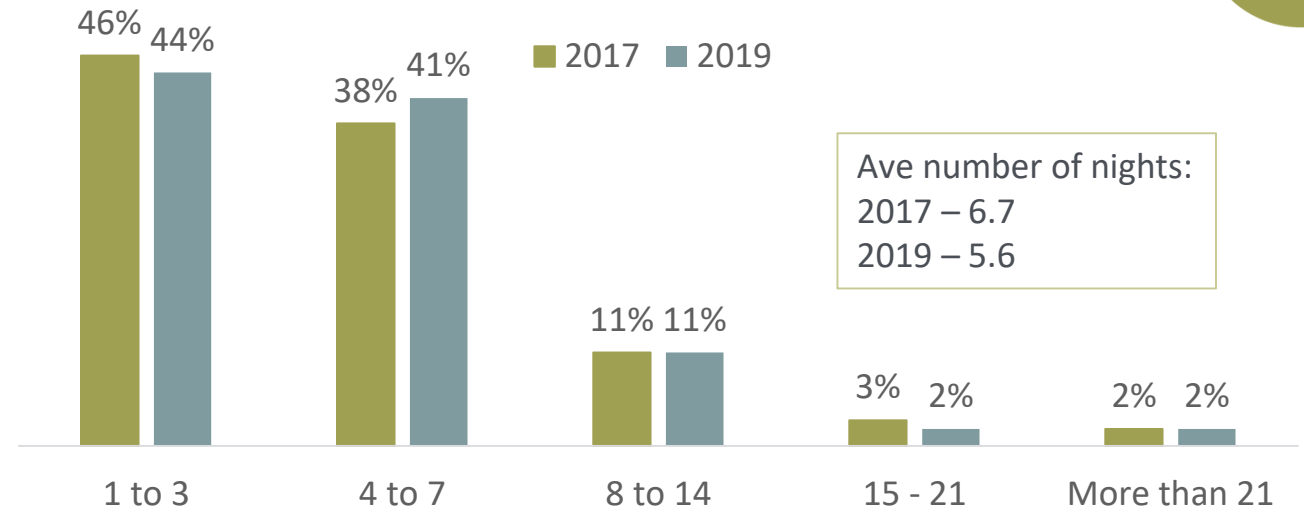
Base (All calibration visitors): 2,957, Leisure: 1,896, VFR: 493, Business: 513

Trip profile

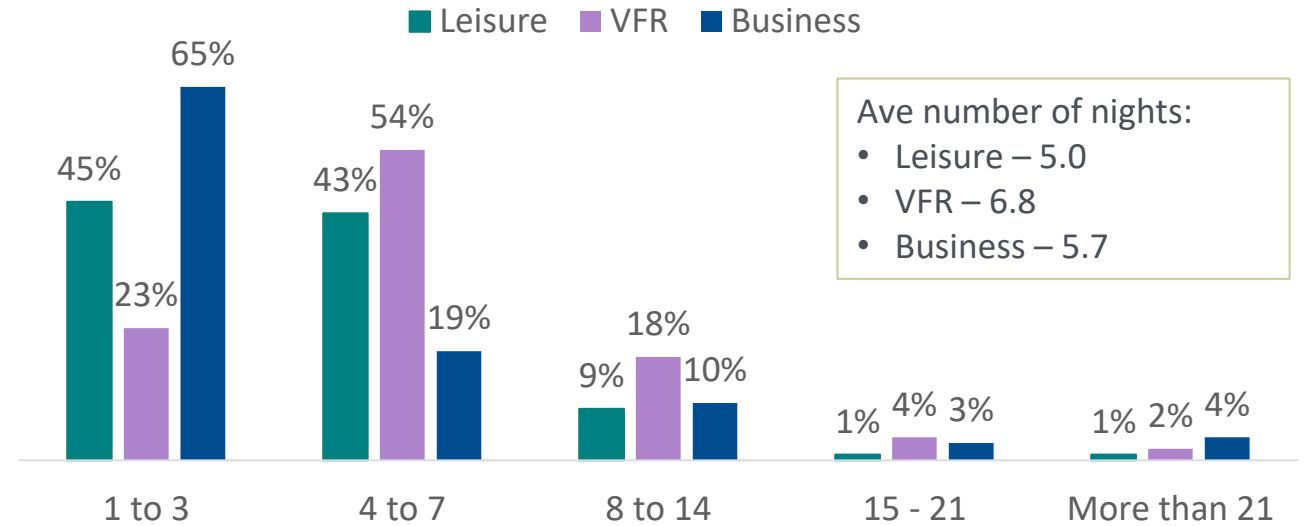
Number of nights

- Consistent with 2017, the majority of overnight visitors to Orkney (85%) stayed for a period of one week or less. The overall average number of nights spent on Orkney was slightly lower in 2019 compared to 2017. The higher average in 2017 seems to have been driven by a small number of Business visitors staying for a longer period of time (average for business in 2017 was 10.9 nights). Leisure and VFR averages are consistent with 2017 (Leisure 5.3; VFR 7.0).
- Leisure visitors were split approximately evenly between those on a short break of 1 to 3 nights (45%) and those staying 4 to 7 nights (43%). The average number of nights was 5 nights.
 - Leisure visitors from overseas (67%) tended to spend 3 nights or less; while Scotland (55%) and rest of UK visitors (52%) tend to stay for 4 to 7 nights. A higher proportion of rest of UK (18%) and Scotland (13%) visitors stayed for more than 7 nights compared to overseas visitors (5%).
- VFR visitors tended to stay longer, with a skew to 4 to 7 nights (54%) or longer (23%). The average number of nights was 7.
- Business visitors predominantly stay for 3 nights or less (65%).

Number of nights - Orkney



Ave number of nights:
2017 – 6.7
2019 – 5.6



Ave number of nights:
 • Leisure – 5.0
 • VFR – 6.8
 • Business – 5.7

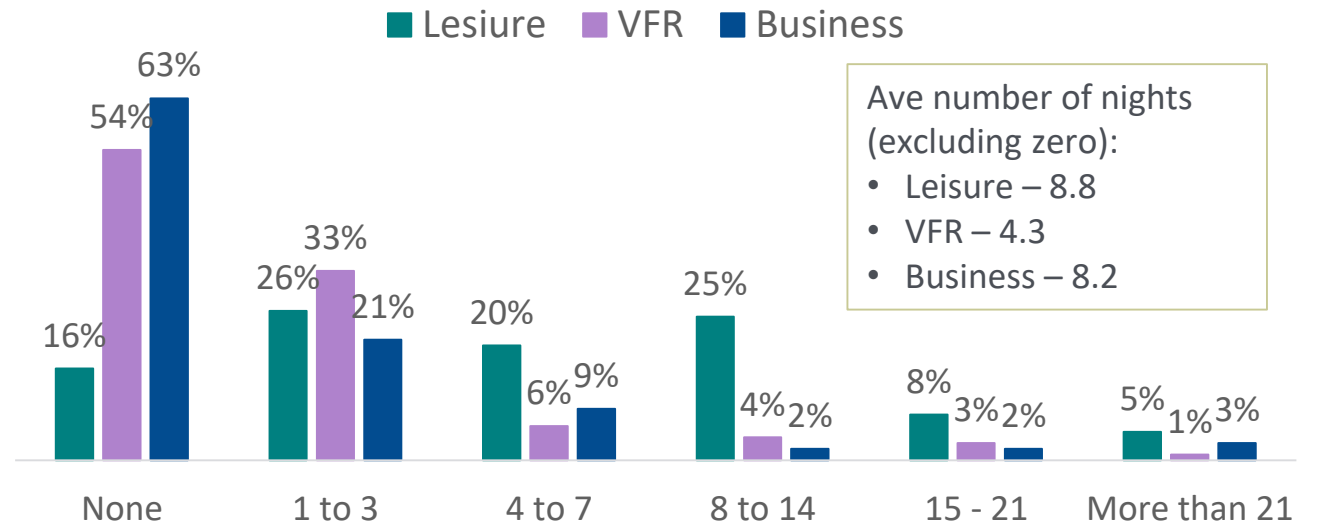
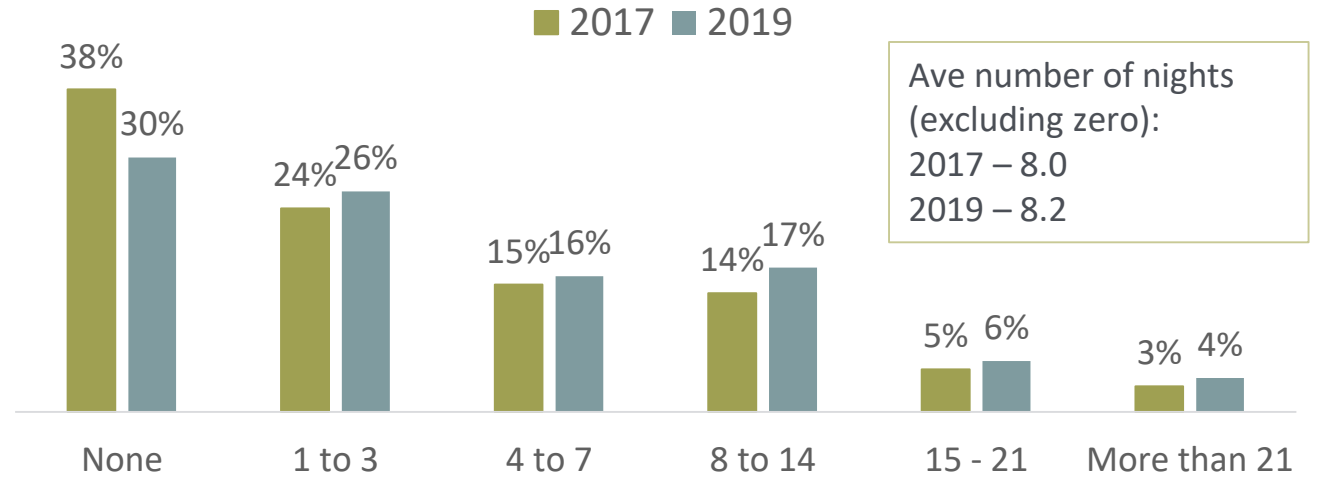
Base (All overnight calibration visitors): Total 2,681, Leisure 1,716; VFR 482; Business 432

Trip profile

Number of nights

- Of those who stayed overnight on Orkney, 70% reported that they spent nights elsewhere in Scotland on their trip. This is an increase in visitors who were on holiday in Scotland as well as Orkney compared to 2017 (62%).
- As we would expect, the proportion spending nights in other parts of Scotland was far higher for Leisure visitors (84%) than VFR (47%) or Business (36%) visitors.
- Of those who did spend some time in other parts of Scotland, the average number of additional nights was 8.8 nights for Leisure visitors and 4.3 nights for VFR visitors and 8.2 for Business visitors.

Number of nights - Scotland mainland



Base (All overnight visitors): Total 1,095, Leisure 808; VFR 184; Business 103

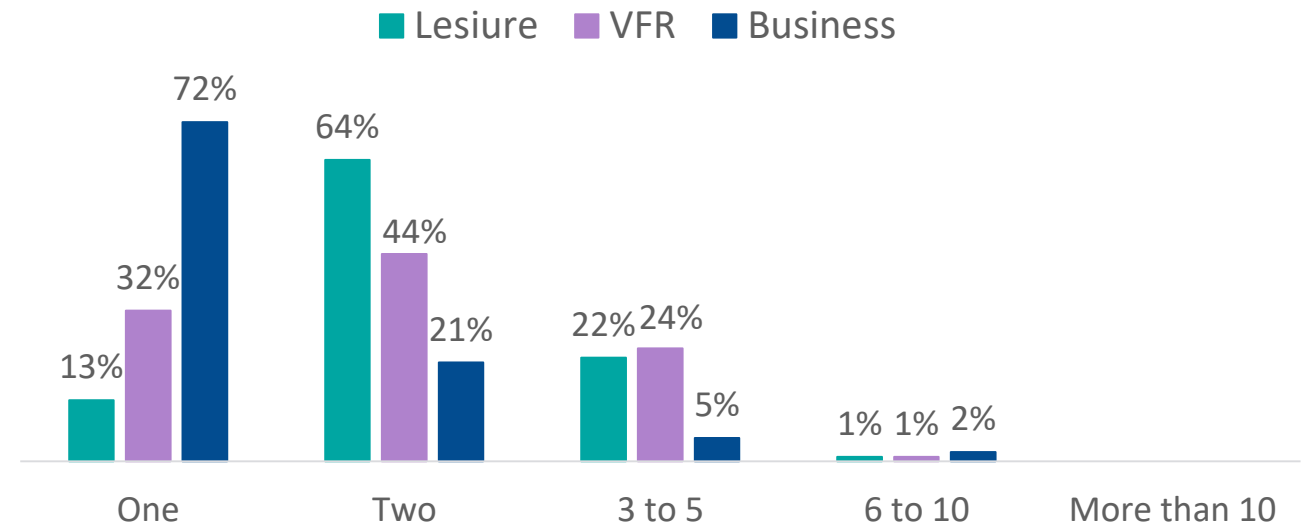
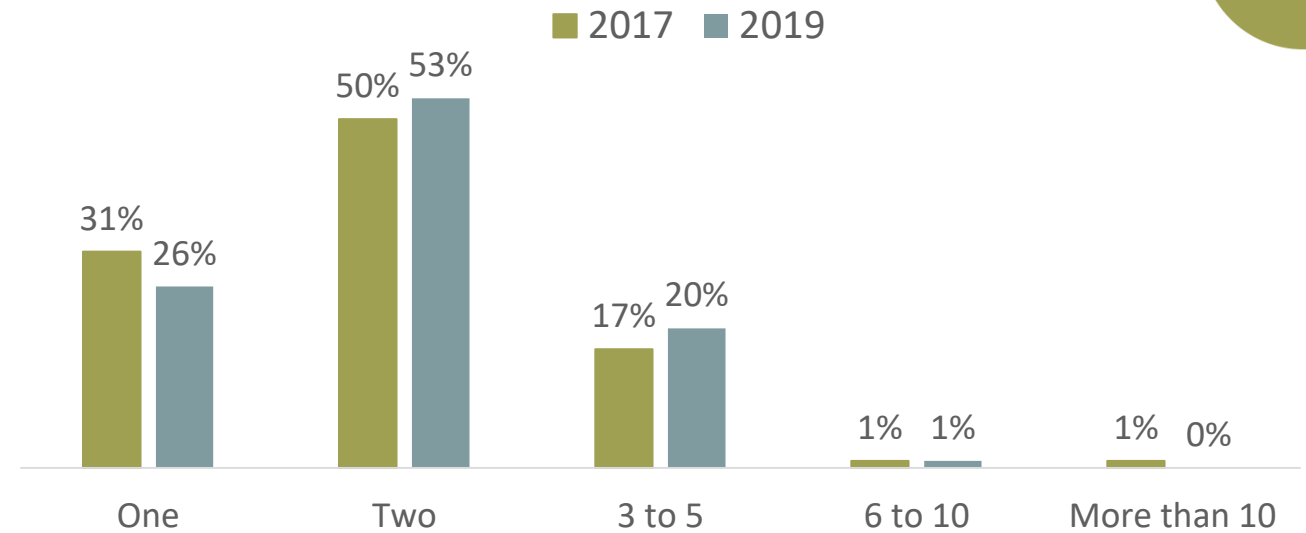
Q12: You previously indicated that you were on an overnight visit to Orkney. On your trip, how many nights did you spend away from home in the following locations? - Scotland

Trip profile

Party composition

- The majority of all visitors to Orkney (79%) reported that they were either visiting alone or with one other person.
- The overall proportion visiting alone or with one other person is similar to 2017 (81%), however, the overall proportion visiting alone was lower in 2019 (26%) compared to 2017 (31%).
- Party size varied considerably by type of visitor. The majority of Business visitors (72%) were visiting alone, while the majority of Leisure visitors (64%) were visiting with one other person.
- VFR visitors also tended to visit with one other person (44%), although around one third were visiting alone.
- Only 13% of Leisure visitors were visiting Orkney alone. A higher proportion of under 35 year old Leisure visitors were travelling alone (23%) than for any other age group. There were no differences in the proportions of males and females travelling alone, or by visitor origin.

Number of people in party



Base (All calibration visitors): Total 2,957, Leisure 1,896; VFR 493; Business 513

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

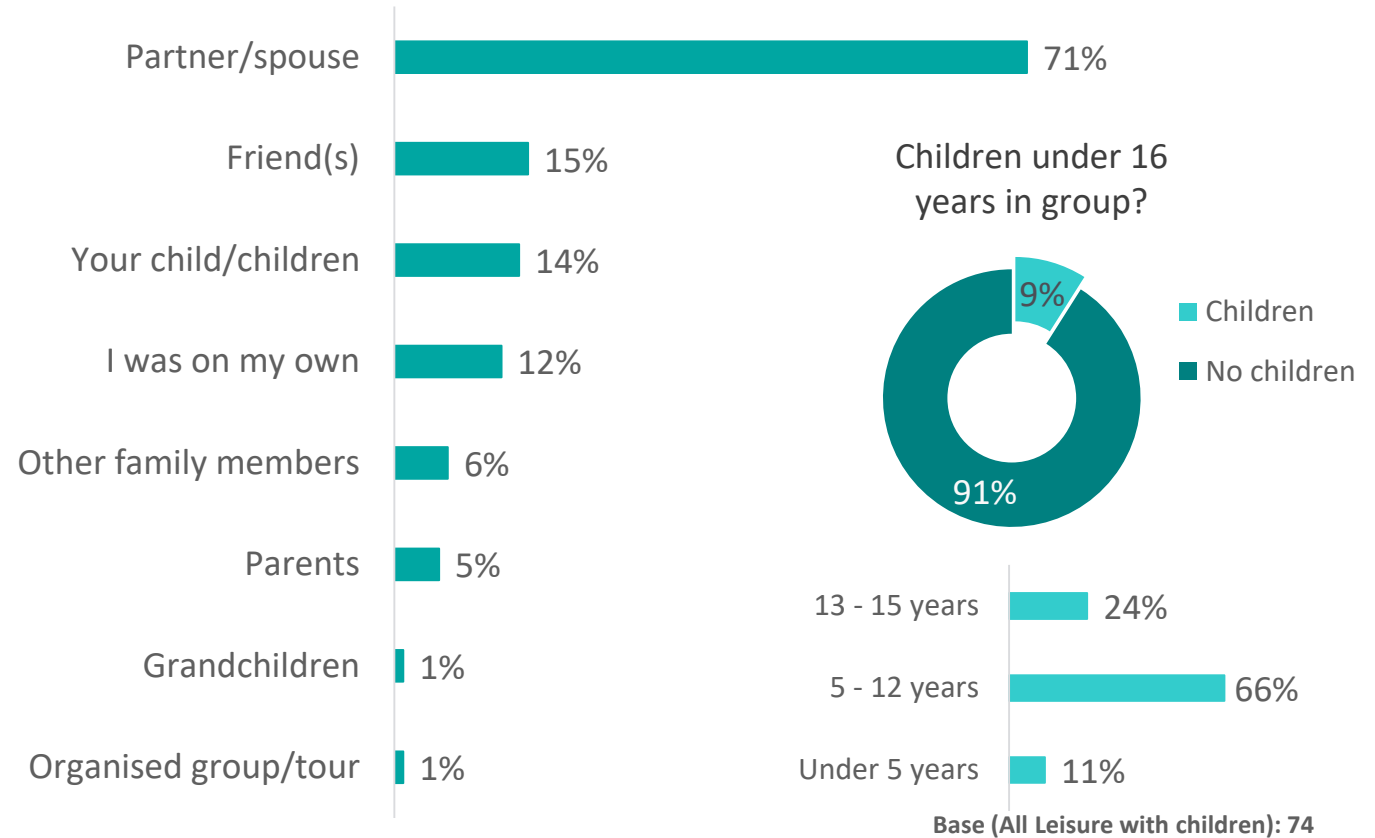
Trip profile

Party composition

- The majority of Leisure visitors to Orkney in 2019 (71%) were travelling with their partner/spouse. It should be noted, however, that only 51% were only travelling as a couple, with others also mentioning others in their group, such as children or friends.
- Over one quarter of Leisure visitors (28%) reported that they were travelling with family members, including partners, children, parents and others. This proportion is very similar to 2017 when 26% were travelling with family members.
- Similar to 2017 (8%), almost one in ten (9%) had children under 16 years old in their group. Most of those who had children in their party (66%) reported they were of primary school age.
- Just over one tenth of Leisure visitors (12%) reported that they were travelling alone*. This shows a decrease in Leisure visitors travelling alone to Orkney since 2017, when 18% stated this option.
- Leisure visitors from Scotland (16%) were more likely to be travelling with their children in their group than those from the rest of the UK (9%) or overseas (6%).

*There is a slight difference in the proportion stating 'on my own' here (12%) compared to stating alone for 'number of people in party' (13%). This is due to the number of people in party being taken from the calibration survey and party composition being asked in the online survey.

Party composition – Leisure visitors



Base (All leisure): 875

Trip profile

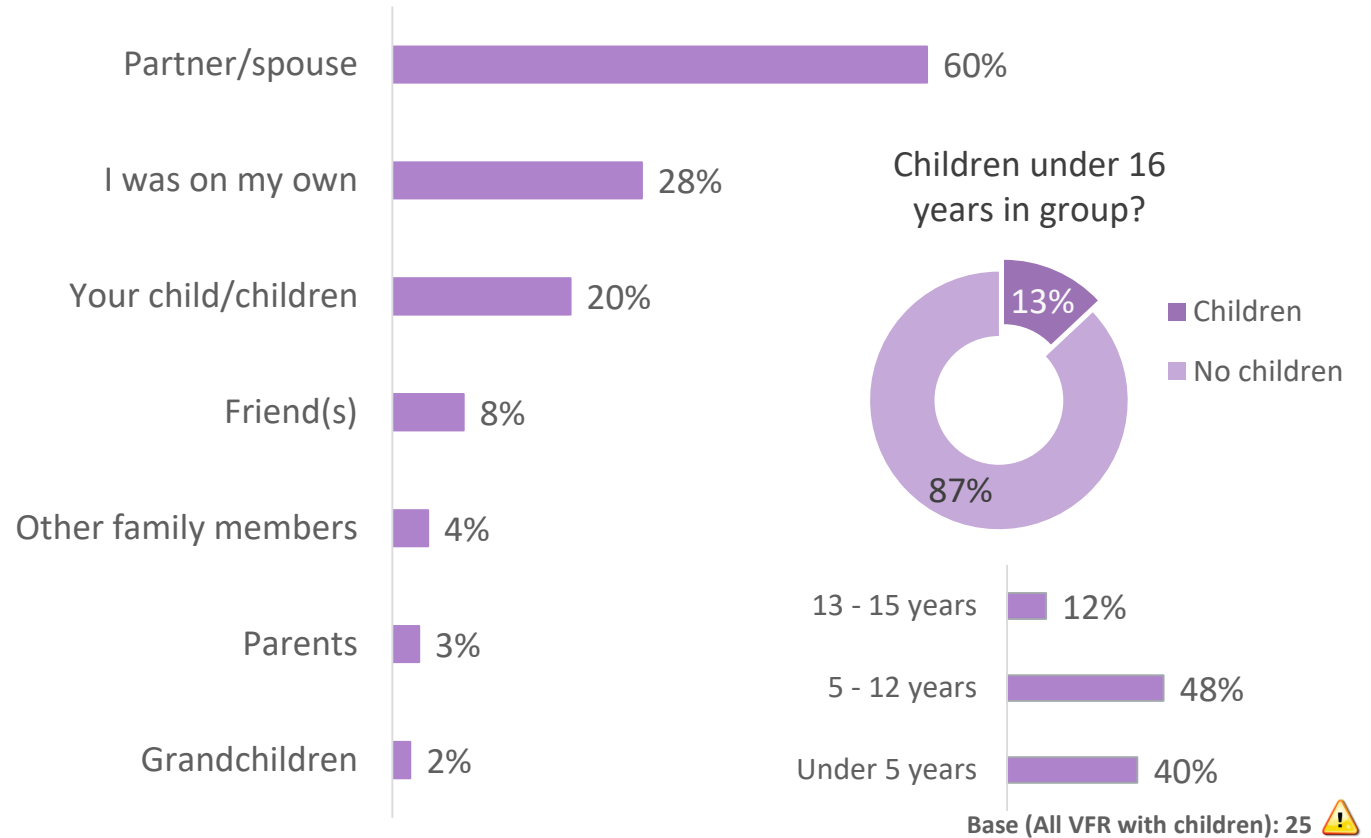
Party composition

- Amongst those travelling to Orkney to visit friends and relatives, a far higher proportion were travelling alone* (28%) compared to Leisure visitors (12%).
- In total, 60% reported that they were visiting with their partner/spouse, with 40% reporting no other people in their group (i.e. they were travelling as a couple).
- Just over one quarter of VFR visitors (28%) were visiting with family members, with 13% reporting having children under 16 years old in their group.

*There is a slight difference in the proportion stating 'on my own' here (28%) compared to stating alone for 'number of people in party' (32%). This is due to the number of people in party being taken from the calibration survey and party composition being asked in the online survey.



Party composition - Visiting friends and relatives



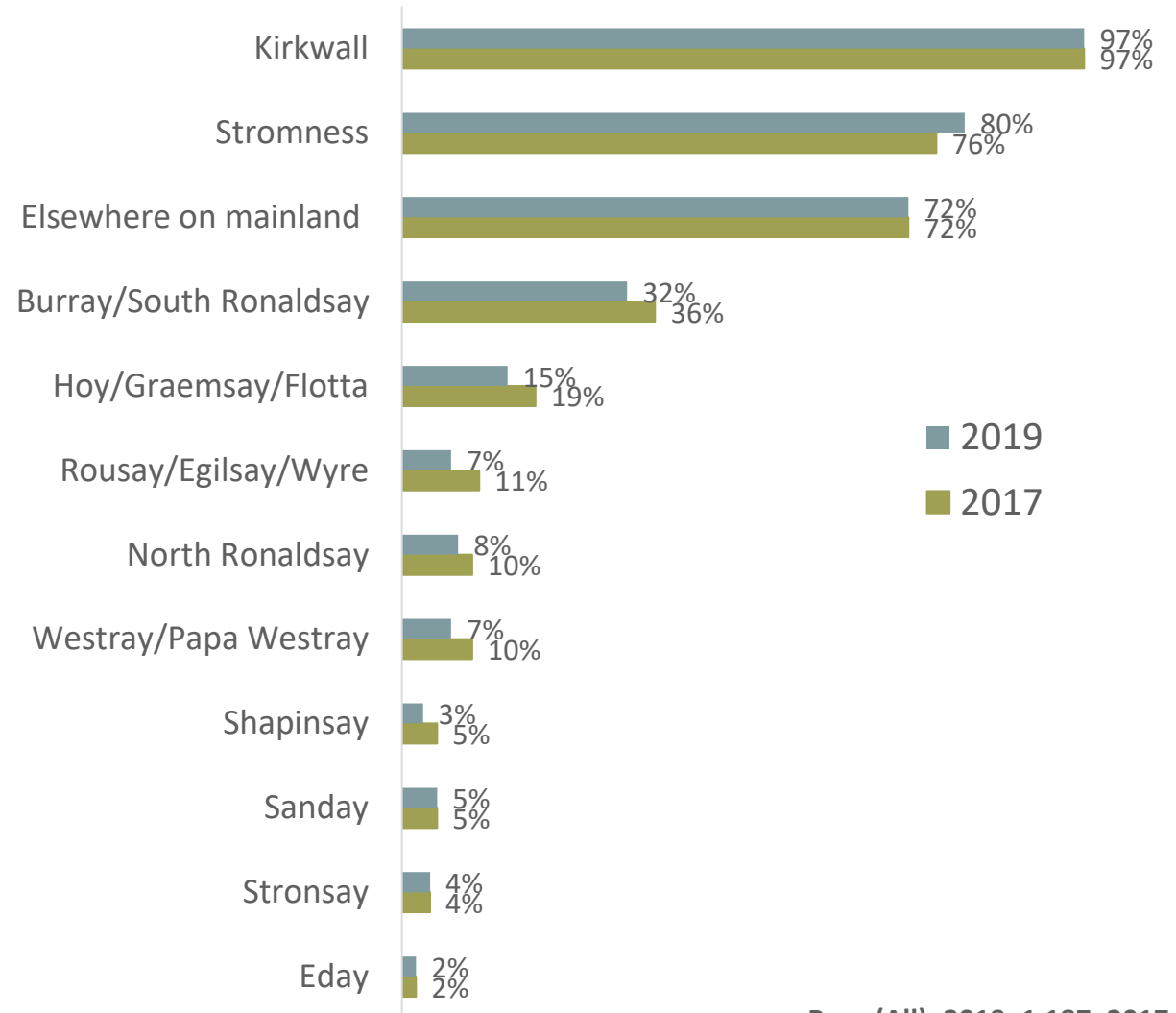
Base (All VFR): 187

Trip profile

Areas visited

- Almost all visitors to Orkney reported that they visited Kirkwall during their trip. The majority also mentioned visiting Stromness (80%) and other parts of the mainland (72%).
- One third of all visitors reported that they had visited Burray/South Ronaldsay during their trip to the Orkney Islands.
- 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.
- Compared to 2017, the pattern of response was very similar

Areas of Orkney visited - All visitors



Base (All): 2019: 1,187, 2017: 1,330

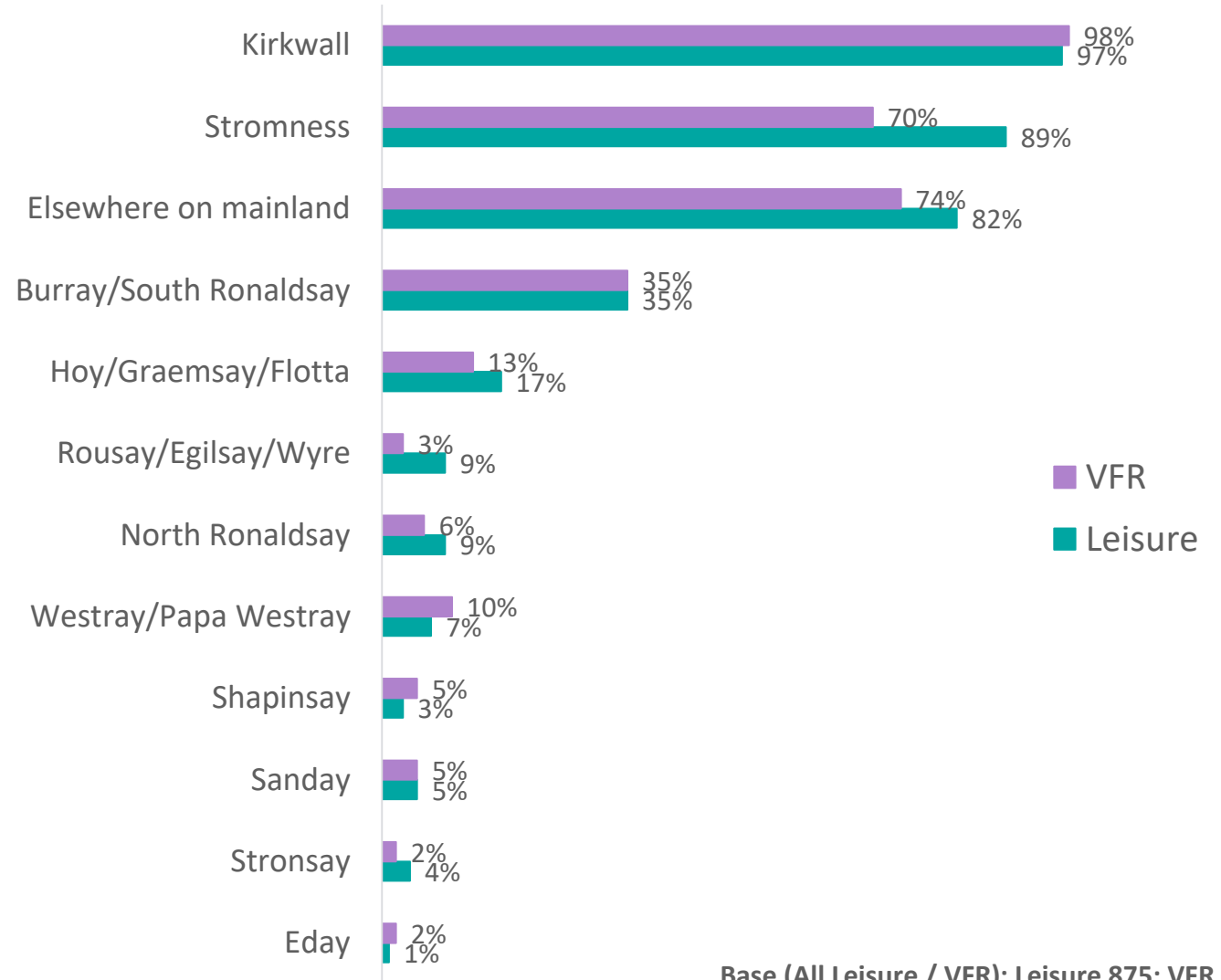
Q14: Which of the following areas of Orkney did you visit during your trip?

Trip profile

Areas visited

- Both Leisure and VFR visitors predominantly visited the mainland locations, including Kirkwall, Stromness and other mainland locations.
- However, the proportion of Leisure visitors visiting some parts of Orkney was higher than VFR visitors, for example Stromness, elsewhere on mainland and Rousay/Egilsay/Wyre. 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.

Areas of Orkney visited - Leisure and VFR visitors



Base (All Leisure / VFR): Leisure 875; VFR 187

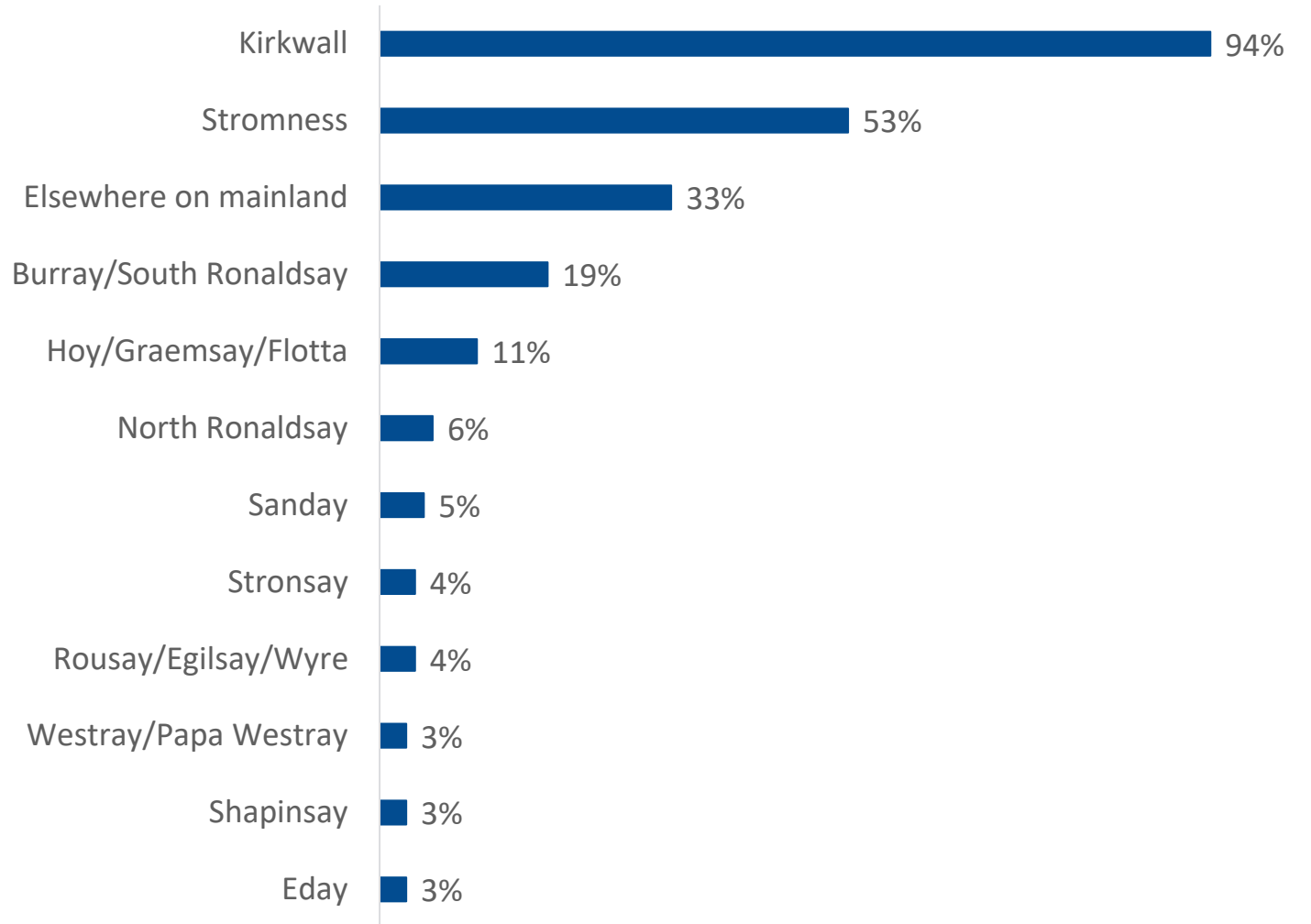
Q14: Which of the following areas of Orkney did you visit during your trip?

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 (94%) reported visiting Kirkwall, while 53% also visited Stromness and one third went to other parts of the mainland.

Areas of Orkney visited - Business visitors



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

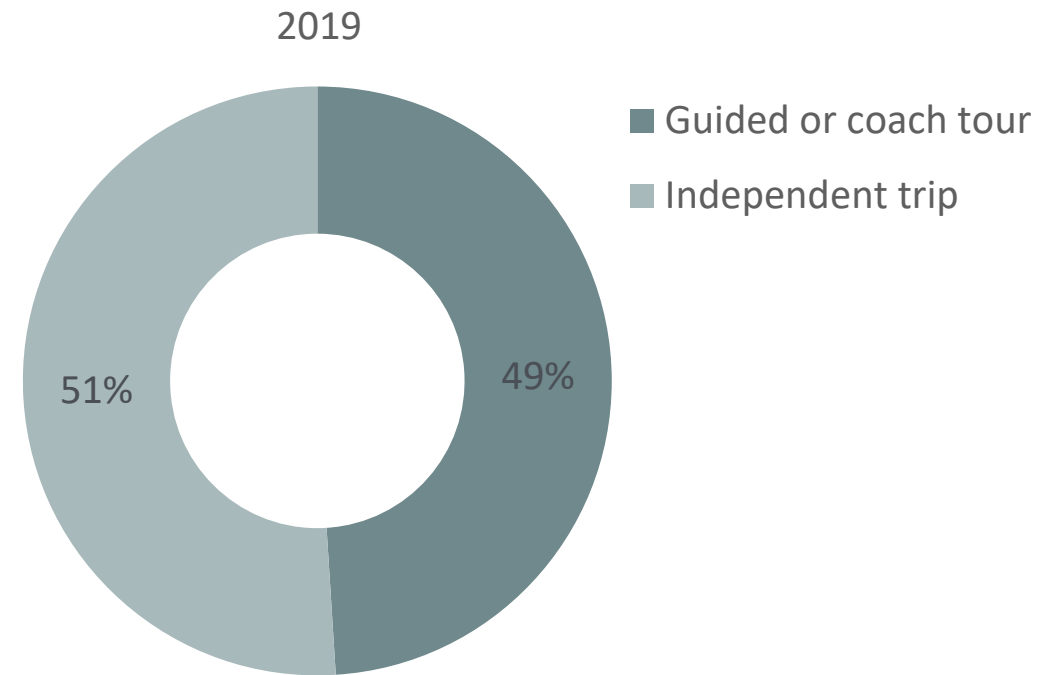
Base (All Business): 116

Trip Profile

Day trips

- A number of visitors to Orkney (13%) reported that they were on a day trip from mainland UK and did not stay overnight. These visitors were asked if they were visiting on a guided or coach tour package or if they were travelling independently.
- Half of day visitors in 2019 reported that their trip was a guided or coach tour, while half were travelling independently.

Type of day trip - Leisure and VFR day visitors



Trip Profile

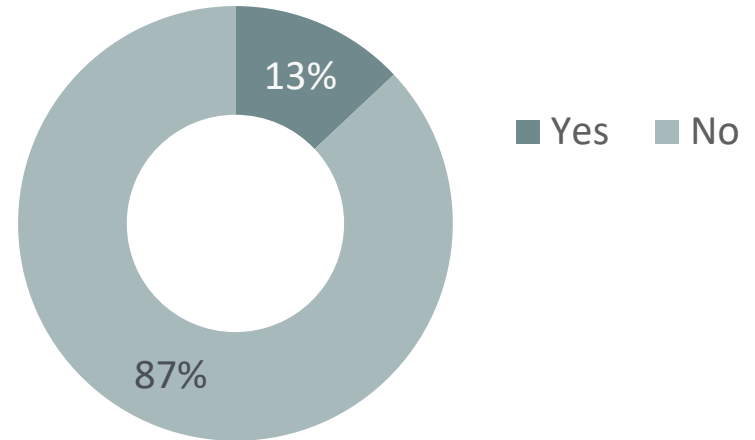
Previous day trips

- Leisure and VFR 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, 13% of overnight Leisure/VFR visitors reported that they had previously visited Orkney on a day trip from the mainland in the past. The proportion who had been on a day trip before was higher for Leisure visitors (17%) than for VFR visitors (7%).
- Almost half of visitors who had been on day trip to Orkney before had travelled independently (46%), while one third had been on a guided coach tour (32%). Almost one fifth (18%) reported that they had previously been on a shore excursion from a cruise ship.

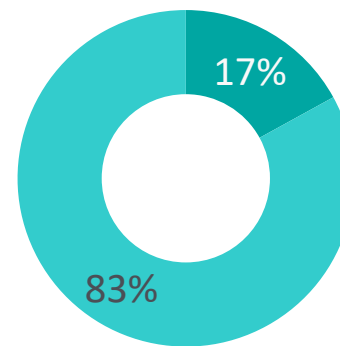


Been on a day trip to Orkney before? – Leisure and VFR overnight visitors

All Leisure/VFR overnight visitors

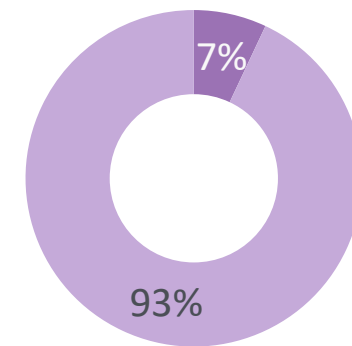


Leisure



■ Yes ■ No

VFR



■ Yes ■ No

Base (Leisure/VFR overnight visitors – excluding first time visitors): Total 402; Leisure 250; VFR 150

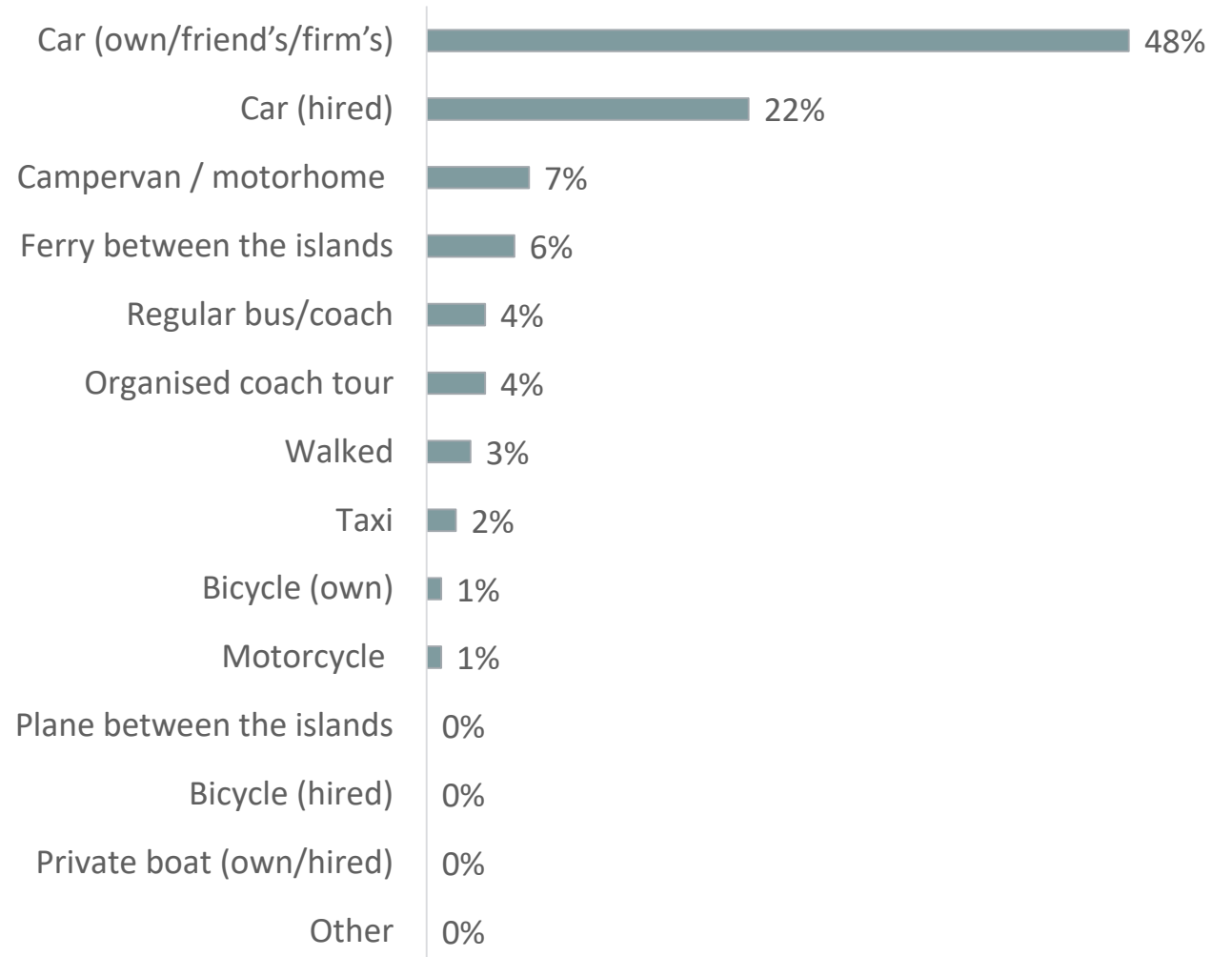
Q18: You previously indicated that your recent visit to Orkney involved an overnight trip. Before this visit, had you ever visited Orkney on a day trip (i.e. you only visited Orkney for the day)? / Q19: When you previously visited Orkney on a day trip, was this ...?

Trip profile

Transport

- The largest proportion of visitors (71%) reported that they had travelled by car during their visit – 48% using their own car and 22% using a hired car.
- In total, 7% of all visitors mentioned travelling by campervan or motorhome. This represents an increase since 2017 when 4% cited a campervan. Amongst Leisure visitors 10% reported using a campervan, again an increase since 2017 when 5% reported this form of transport.
- Using a privately owned car was more frequently mentioned by VFR visitors (77%) than Leisure (41%) or Business (46%) visitors. Hire cars were more frequently mentioned by Leisure visitors (27%) than VFR (5%) or Business (19%) visitors.
- Taxis were used by 15% of Business visitors.

Main type of transport during visit



Base (All, excluding rotational shift workers): 1,146

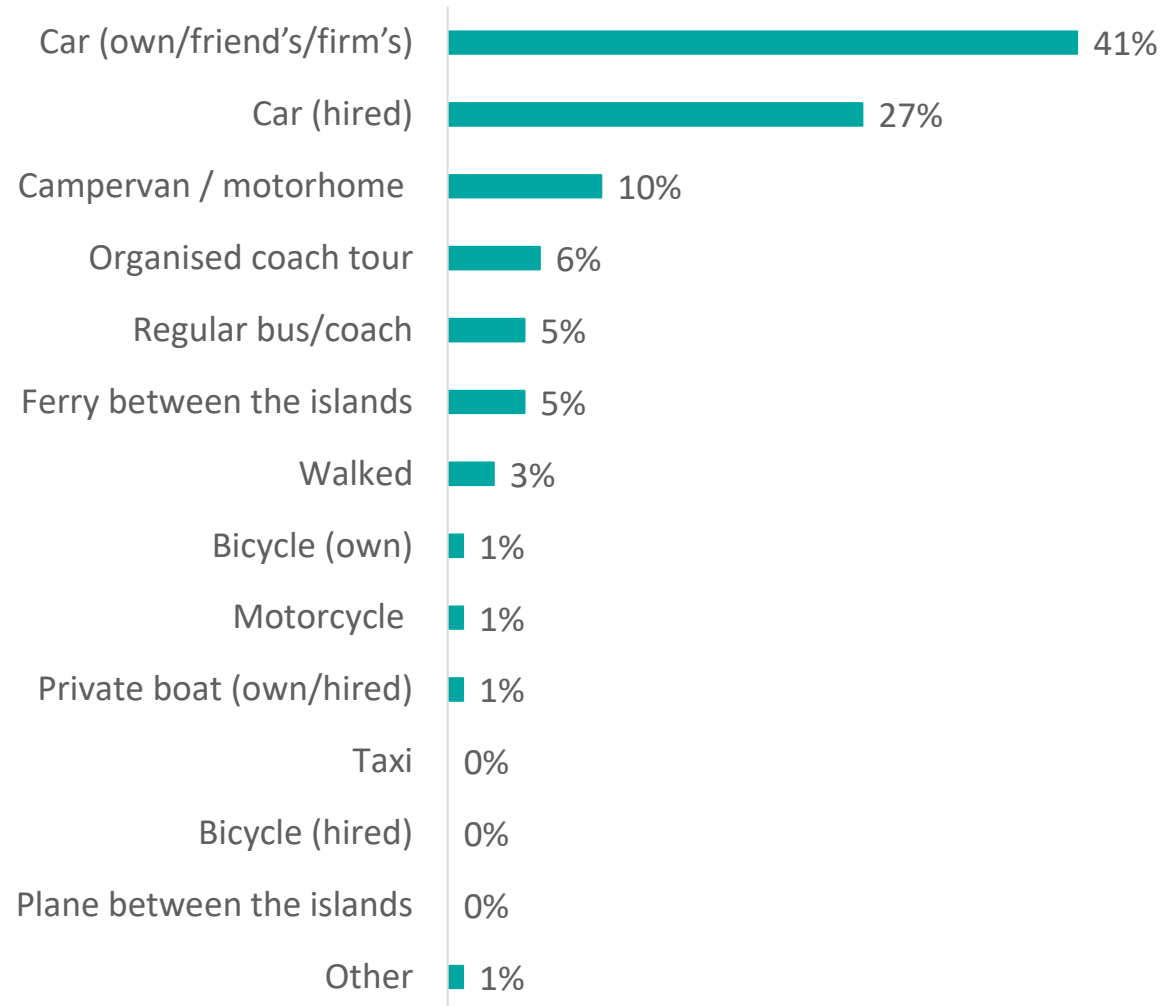
Q20: What was the main type of transport you used during your visit to Orkney, i.e. whilst on the island/s?

Trip profile

Transport

- Cars were the most often used transport for Leisure visitors, mentioned by 68% of Leisure visitors in total. Privately owned cars (41%) were more frequently mentioned than rental cars (27%).
- Leisure visitors from Scotland (66%) and the rest of the UK (50%) were more likely to use their own car than those from overseas (19%).
- 50% 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 (30%), and more likely to travel by bus (11%).

Main type of transport during visit – Leisure visitors



Q20: What was the main type of transport you used during your visit to Orkney, i.e. whilst on the island/s?

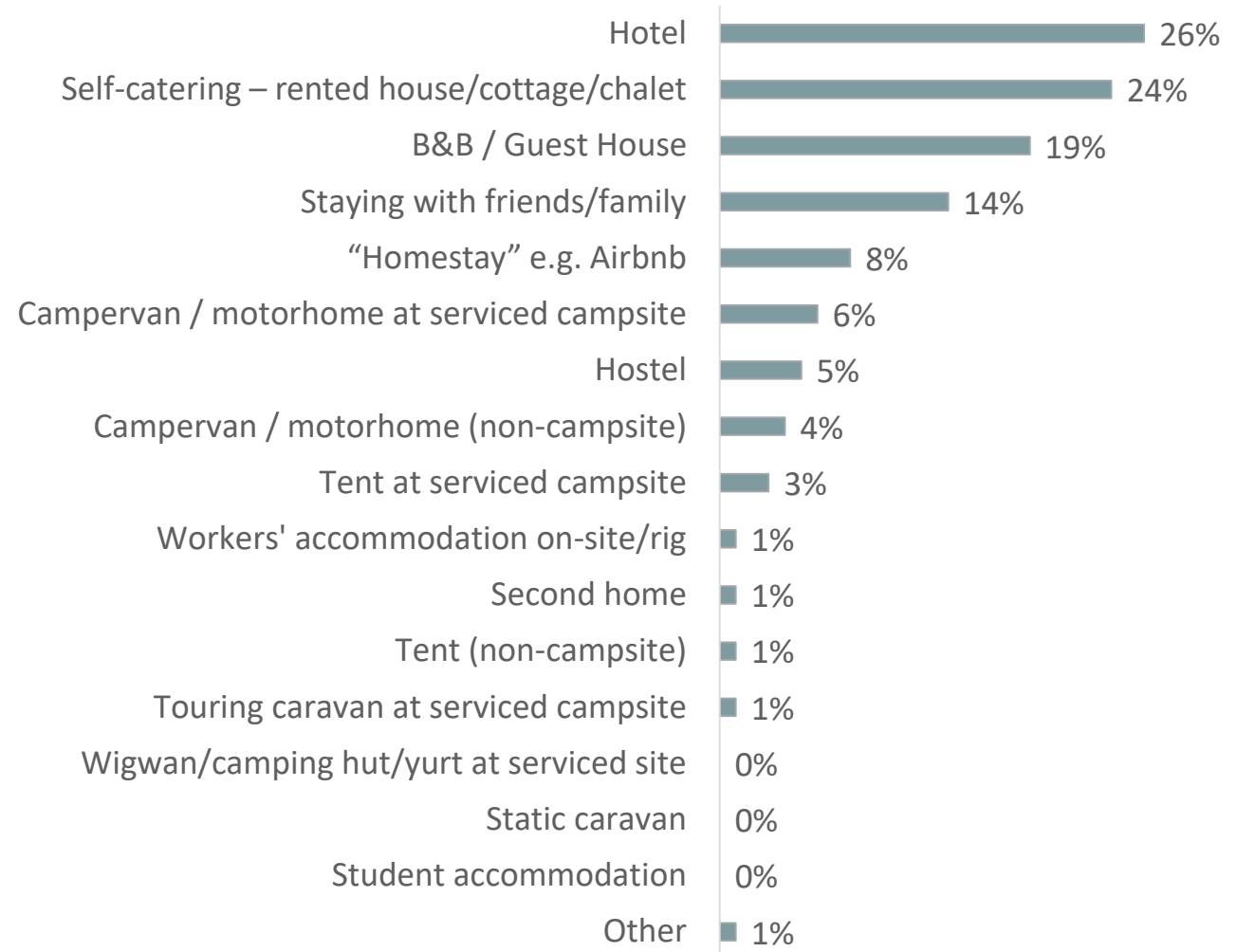
Base (All Leisure): 875

Trip profile

Accommodation

- Hotels (26%) and self-catering (24%) were the most often cited types of accommodation for overnight visitors, followed by B&Bs (19%) and staying with friends/family (14%).
- Since 2017 there have been increases in the proportions of visitors staying in 'homestay' accommodation (4% in 2017 to 8% in 2019) and in a campervan (4% in 2017 to 8% in 2019).
- Hotels were particularly prevalent amongst Business visitors (59%), compared to Leisure (22%) and VFR (6%) visitors.
- Self-catering accommodation was more common amongst Leisure visitors (29%), compared to VFR (18%) and Business (12%) visitors.
- As expected, the majority of VFR visitors (66%) were staying with friends or relatives.

Accommodation stayed in during visit – Overnight visitors



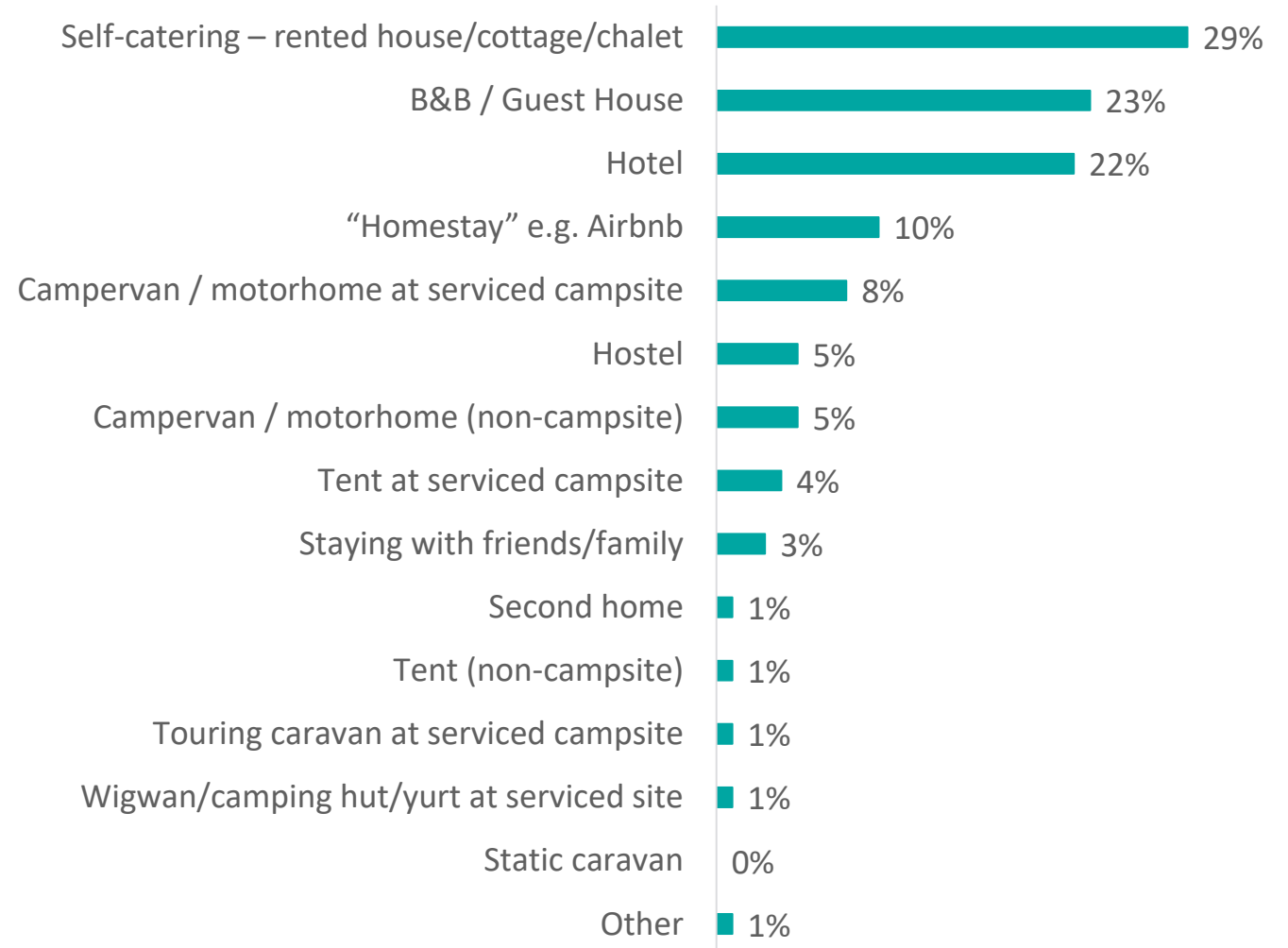
Base (All overnight visitors): 1,095

Trip profile

Accommodation

- Self-catering accommodation was the preferred option for 29% of Leisure visitors, while around one quarter stayed in hotels or B&Bs. There has been an increase in those staying in 'homestay' accommodation (10%) and campervans (11%) compared to 2017 (both 5%).
- Leisure visitors from North America (34%) or other overseas countries (36%) were more likely to stay in a hotel than those from the rest of the UK (21%) or from Scotland (13%).
- Overseas visitors were also more likely than UK visitors to stay in a B&B or guest house – 32%, compared to 13% of Scotland visitors and 18% of rest of UK.
- Self-catering was more often selected by Scotland and rest of UK visitors (both 40%) than overseas visitors (15%).
- Visitors from Europe were more likely than others to stay in a hostel (10%) or a tent in a serviced campsite (9%).
- Younger respondents aged under 35 years were less likely than average to stay in a hotel (9%) and more likely than average to stay in a hostel (15%). Homestay accommodation was more often mentioned by younger age groups (16% of under 45s) than older age groups (6% of over 65s).

Accommodation stayed in during visit – Overnight Leisure visitors



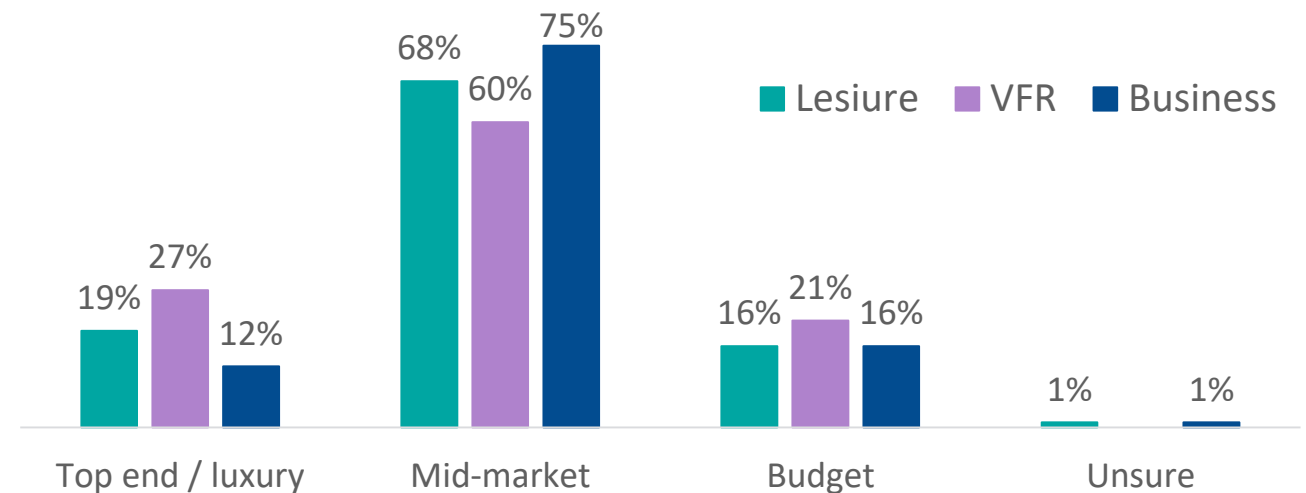
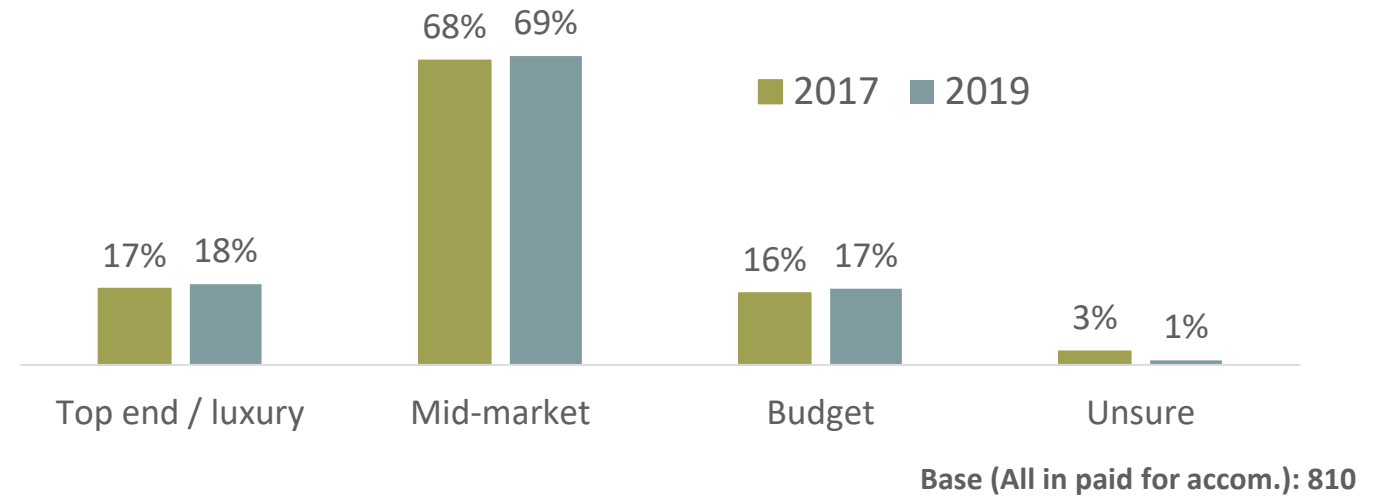
Base (All overnight Leisure visitors): 804

Trip profile

Accommodation

- The majority of visitors to Orkney who were staying in paid for accommodation (69%) described their accommodation as 'mid-market'.
- Of the remainder, there was an almost even split between those staying in luxury (18%) and budget (17%) accommodation.
- These proportions were consistent with the data collected in 2017.
- VFR visitors were the most likely to describe their accommodation as 'top end' (27%).
- Leisure visitors aged 65+ were most likely to describe their accommodation as 'top end' (24%), while under 35 year olds were more likely to stay in budget accommodation (36%) than those in older age groups.

Type of accommodation – Overnight in paid for accommodation

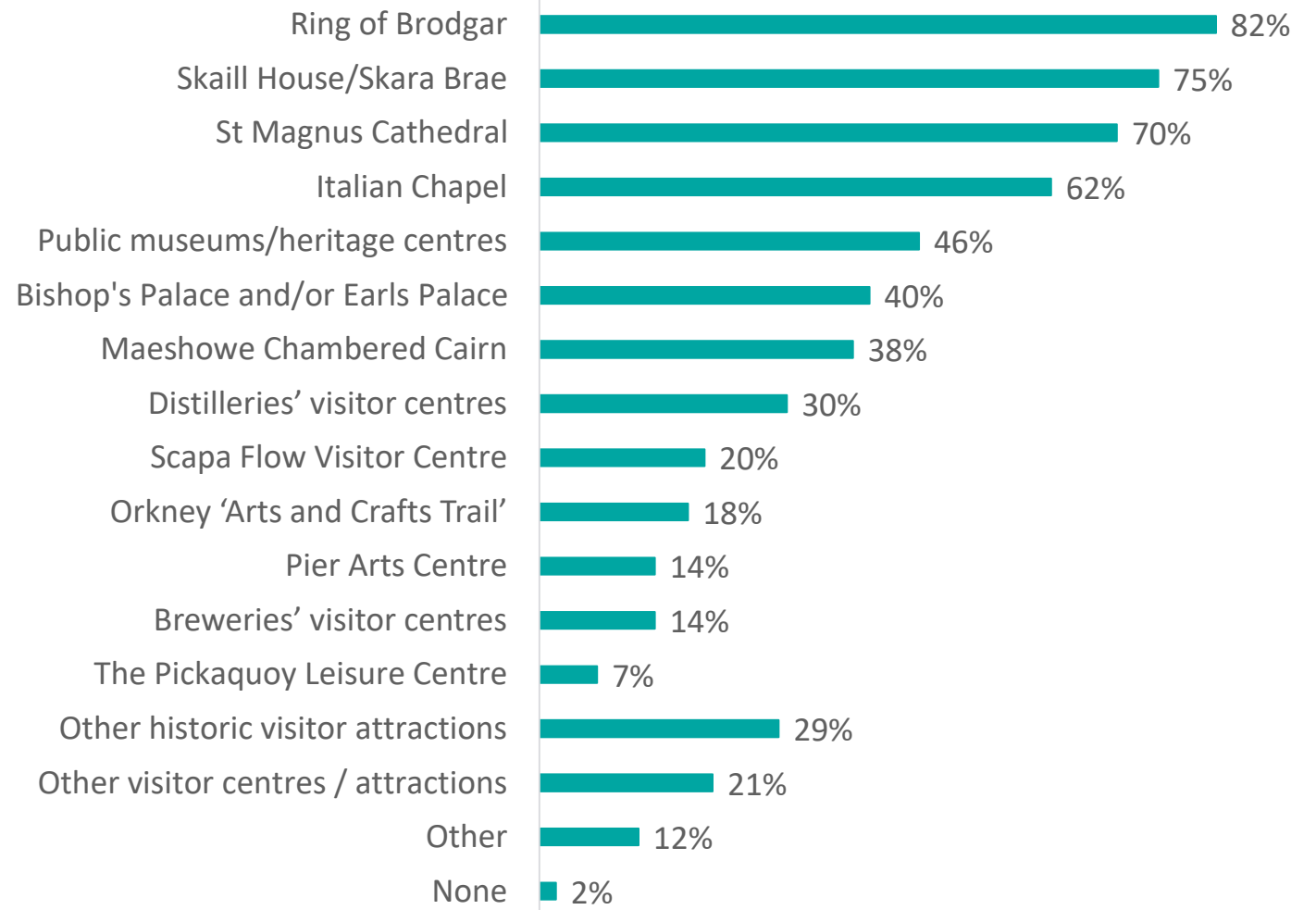


Trip profile

Attractions visited

- The main attractions visited by Leisure visitors were Ring of Brodgar, Skaill House/Skara Brae, St Magnus Cathedral and the Italian Chapel.
- For overseas visitors the top attractions were Ring of Brodgar (87%), Skaill House/Skara Brae (79%, with North American visitors particularly likely to have visited this – 88%) and St Magnus Cathedral (69%). Overseas visitors were more likely than others to visit distilleries (37%), but less likely to visit breweries (10%).
- For visitors from the rest of UK the top attractions were also Ring of Brodgar (80%), Skaill House/Skara Brae (75%), St Magnus Cathedral (73%), along with the Italian Chapel (68%).
- The attractions most popular with Scotland visitors were Ring of Brodgar (74%), St Magnus Cathedral (69%) and Skaill House/Skara Brae (68%). Scotland visitors were more likely than others to have visited the 'Arts and Crafts Trail' (26%) and to have been to the Pickaquoy Leisure Centre (14%).

Visitor attractions on Orkney visited - Leisure visitors



Base (All Leisure): 875

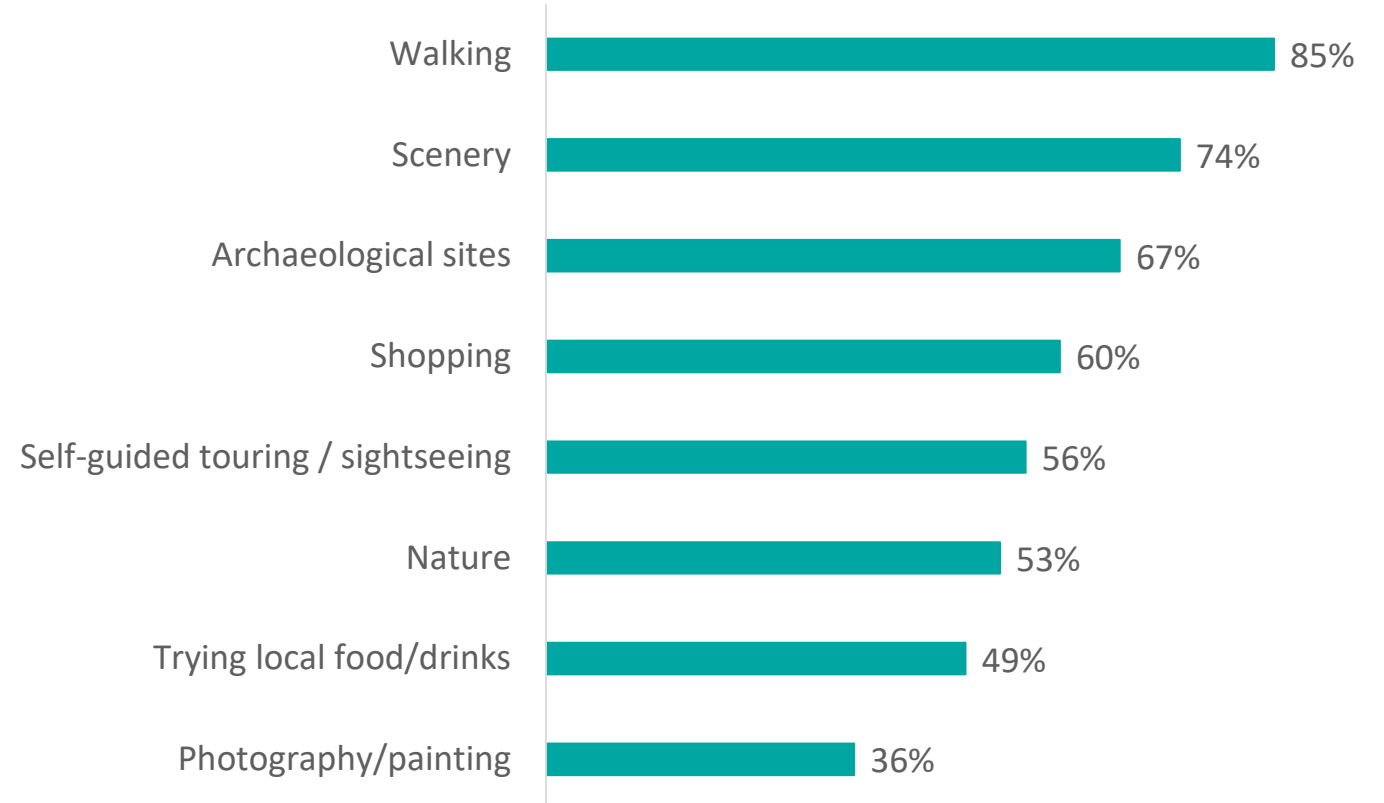
Q44: Which of these visitor attractions in Orkney did you visit on your recent trip?

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 (74%), visiting archaeological sites (67%) and shopping (60%).
- The proportions participating in these activities were broadly similar to 2017, however there was a decrease in those mentioning self-guided tours/sightseeing (65% in 2017).
- Visitors from the rest of the UK (62%) were more likely to mention nature activities than those from Scotland (51%) or overseas (46%). European visitors were less likely than others to mention scenery (56%) or shopping (46%).

Top activities on Orkney - Leisure visitors



Q45: Did you take part in any of the following activities during your visit to Orkney?

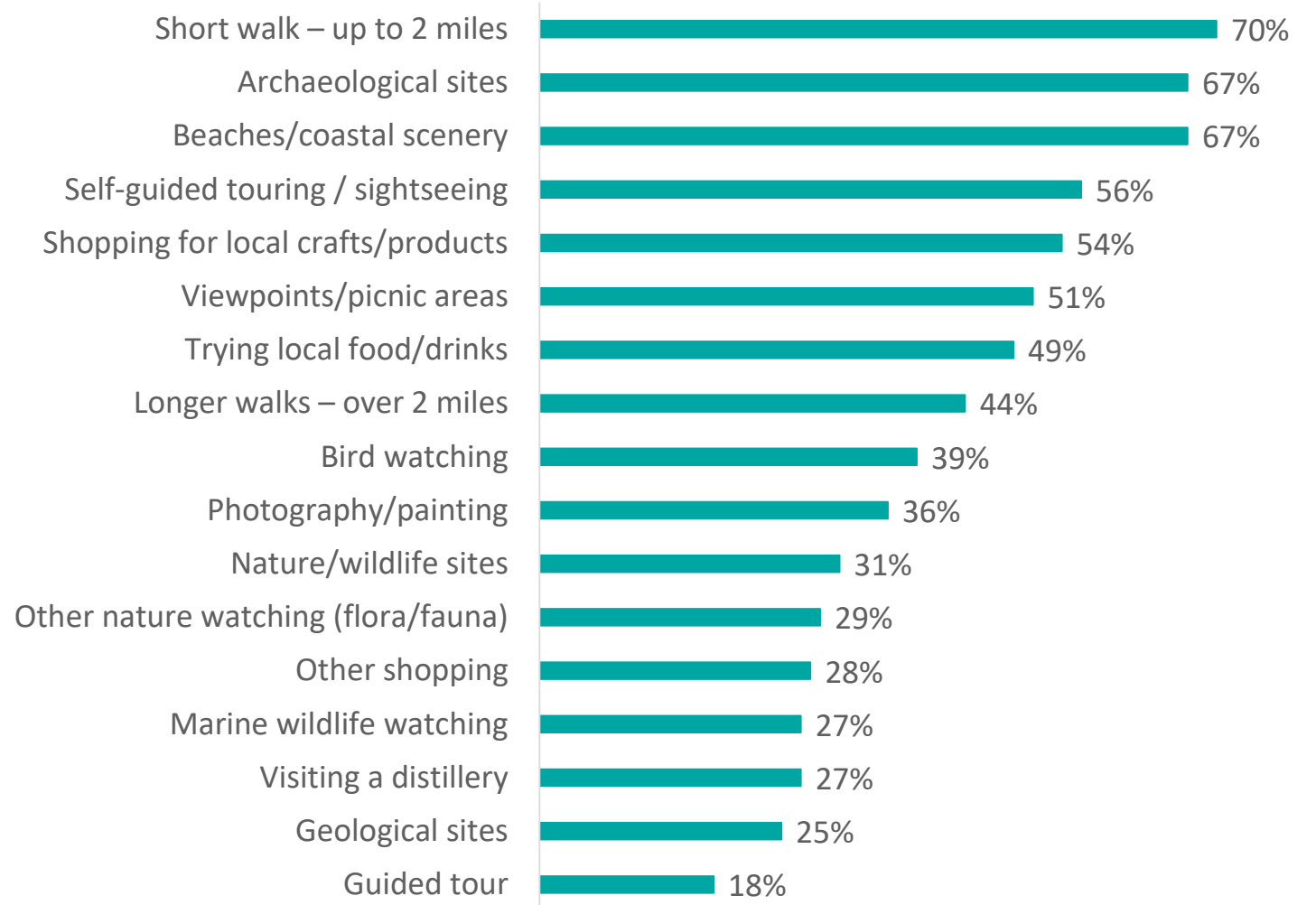
Base (All Leisure): 875

Trip profile

Activities

- Approximately seven in ten Leisure visitors participated in the top three most popular activities – shorts walks, archaeological sites and beaches/coasts.
- Experiencing local produce was also very prevalent, with 54% shopping for local crafts/products and 49% trying local food and drinks.
- More than half of Leisure visitors (53%) also mentioned nature, including bird watching (39%), nature/wildlife sites (31%), marine wildlife watching (27%) and other nature watching (29%).

Top activities in Orkney in detail - Leisure visitors



Q45: Did you take part in any of the following activities during your visit to Orkney?

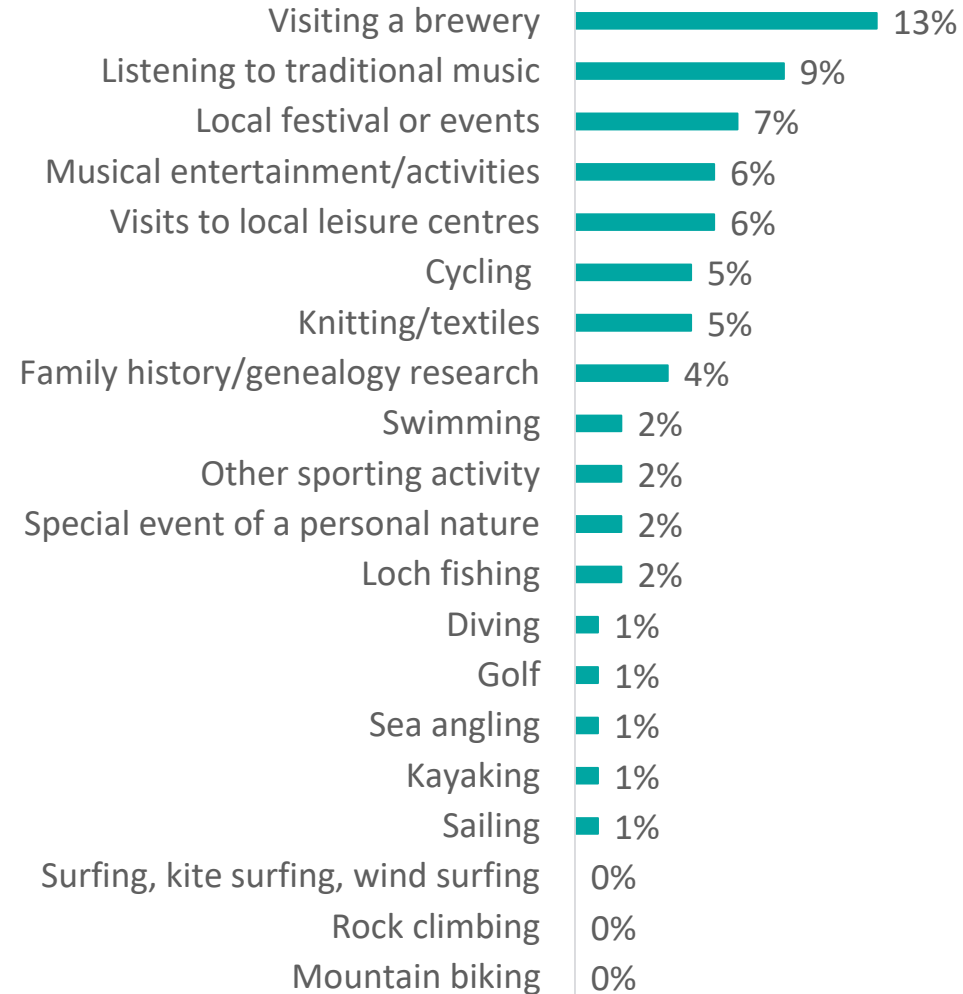
Base (All Leisure): 875

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 visiting a brewery, music, cycling, knitting and other specific sports.
- 7% of Leisure visitors mentioned going to a local festival or event. For these visitors, the events mentioned included an Agricultural Show (13 respondents), Stromness Shopping Week (11 respondents) and the St Magnus International Festival (9 respondents).

Other activities on Orkney - Leisure visitors

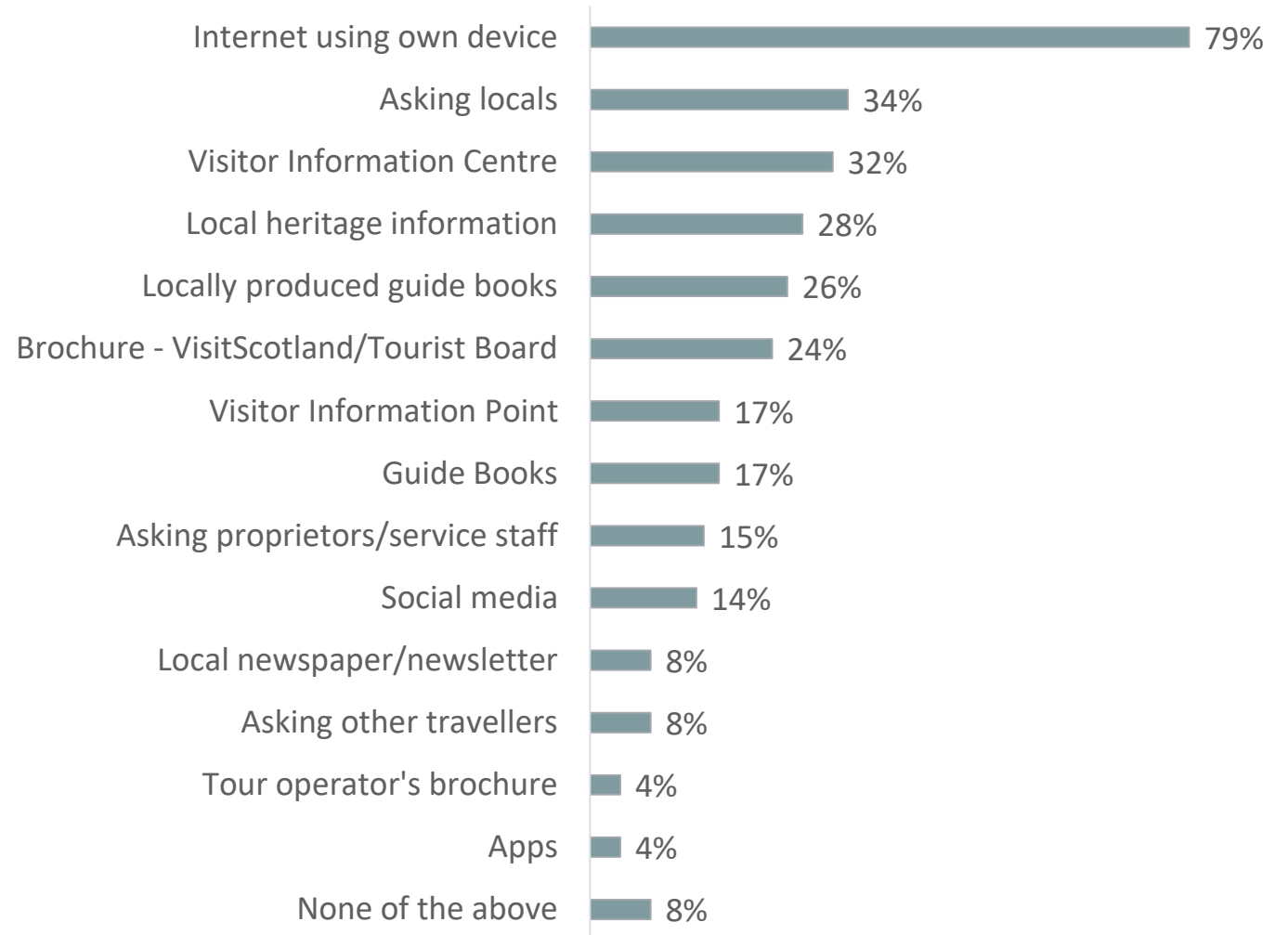


Trip profile

Information

- All respondents were asked about the sources of information they used during their trip to Orkney. 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 – mentioned by four fifths of respondents.
- Visitor centres and speaking to locals were both mentioned by one third of all visitors, while local heritage information and local guide books were also used by over a quarter.
- As we would expect, Leisure visitors used more sources of information during their trip than VFR or Business visitors. For example, Leisure visitors were more likely to use a visitor information centres (41%) than VFR (12%) or Business (8%) visitors. A full breakdown of the information sources used by Leisure visitors is detailed over.
- The Apps used included Historic Environment Scotland, Google maps and TripAdvisor.

Sources of information during trip to Orkney



Base (All, excluding rotational shift workers): 1,146

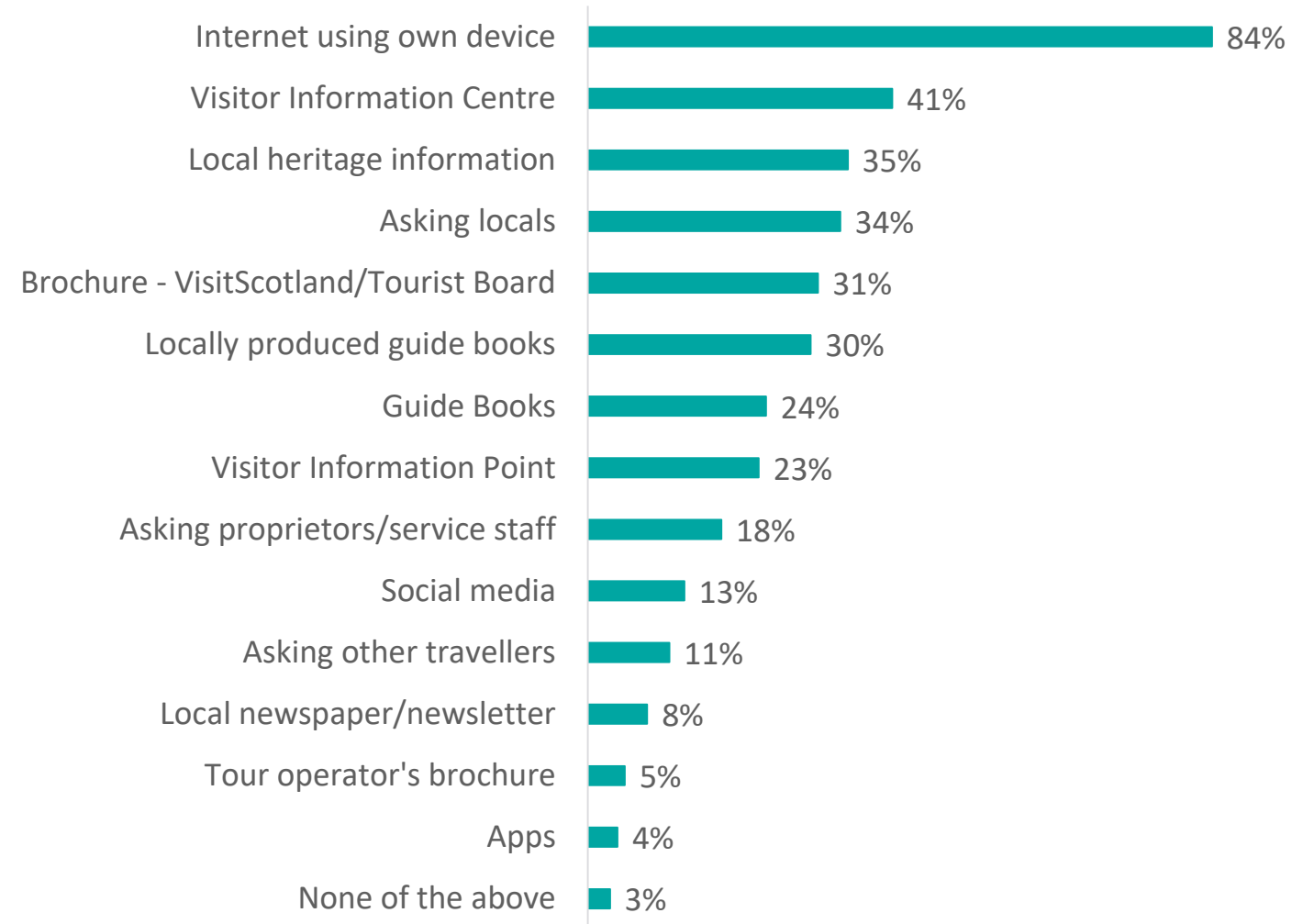
Q47: During your recent visit to Orkney which of the following methods did you use to obtain information about places to visit and things to do?

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 (84%), followed by going into visitor information centres (41%).
- There were some notable differences in the sources of information in 2019 compared to 2017. Fewer Leisure visitors mentioned going to a visitor information centre in 2019 (41%) compared to 2017 (56%); however more used local heritage information (35%, compared to 21% in 2017). Social media usage rose from 7% in 2017 to 13% in 2019. The internet was the top answer across both years, but more Leisure visitors used it in 2019 (84%) than in 2017 (76%).
- Higher proportions of rest of UK visitors used visitor information centres (47%) than Scotland visitors (36%). Rest of UK visitors were also more likely than others to use local heritage information (45%, Scotland 33%; overseas 30%).
- European visitors were most likely to use brochures from Visit Scotland or tourist boards (41%) and mainstream guide books (40%).
- Those from North America were more likely to ask others about places to visit and activities: 19% asked other travellers, 33% asked proprietors or service staff and 47% asked local people.

Sources of information during trip to Orkney – Leisure visitors



Base (All Leisure): 875

Q47: 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?

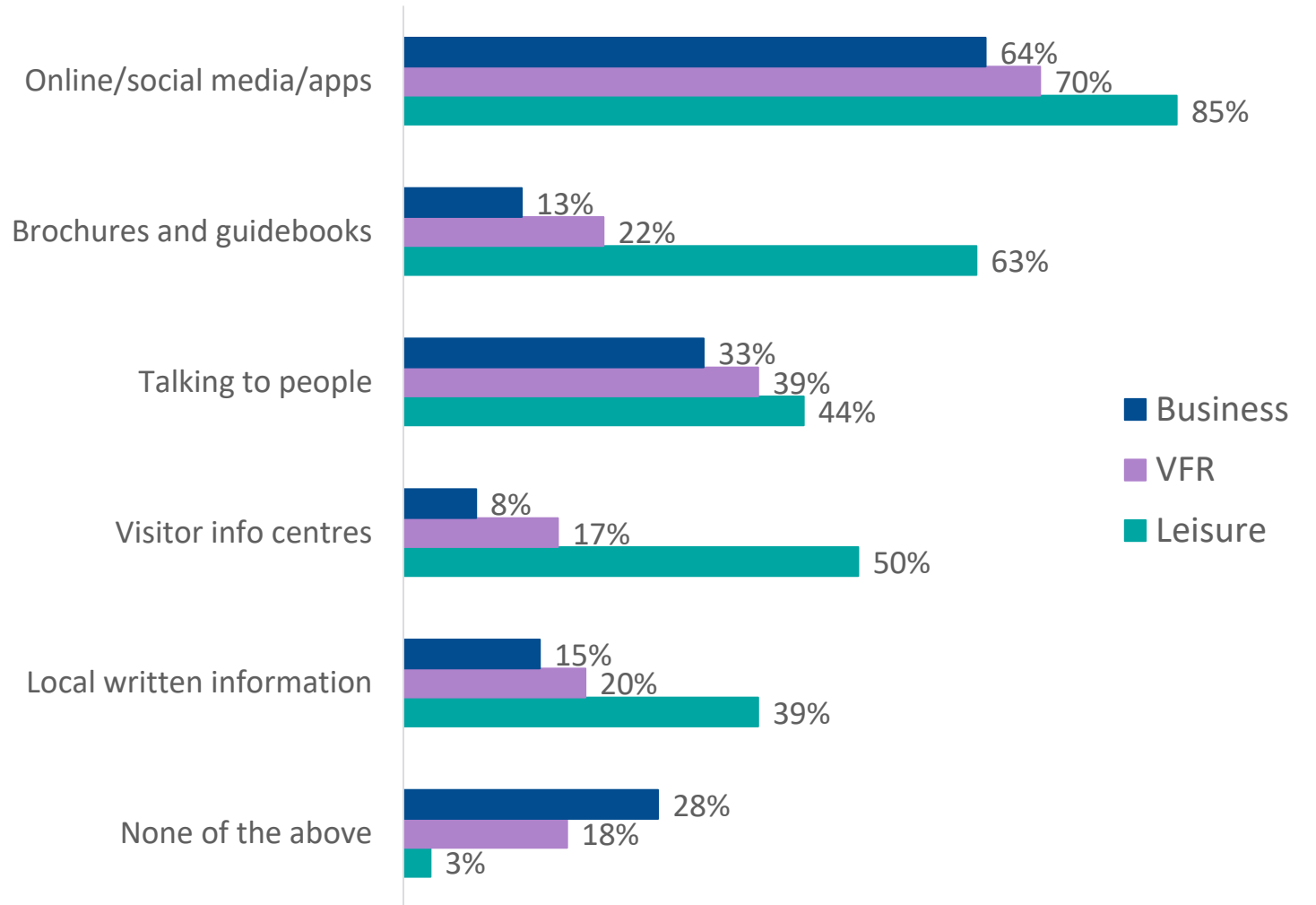
Trip profile

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 (85%), brochures/guidebooks (63%), visitor information centres (50%) and local written information (39%).
- Leisure and VFR visitors were also likely to talk to people to source information. For both groups, this is most likely to be asking local people (Leisure 34%; VFR 35%) rather than proprietors/service staff (Leisure 18%; VFR 5%) or other travellers (Leisure 11%; VFR 2%).
- Amongst Leisure visitors, the oldest age group (over 65s) were more likely to use brochures and guidebooks, visitor information centres and local written information than those within the youngest age group (under 35s).



Sources of information during trip to Orkney



Base (All, excluding rotational shift workers):
Leisure 875; VFR 187; Business 75

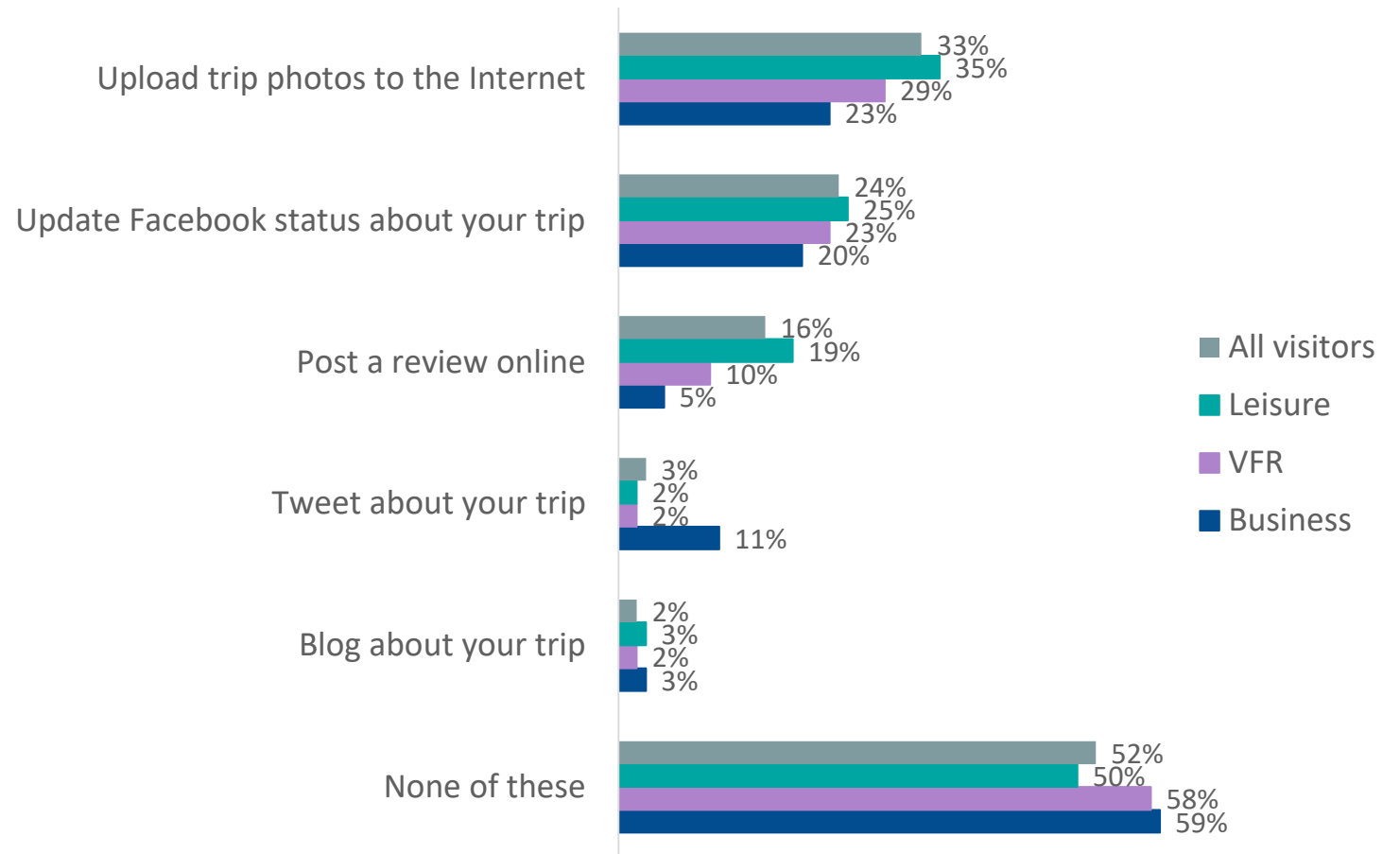
Q47: During your recent visit to Orkney which of the following methods did you use to obtain information about places to visit and things to do?

Trip profile

Information

- In total, almost half (48%) of visitors reported engaging in online or social media activity about their trip to Orkney, which is a slight increase since 2017 (44%). This proportion varied by visitor type – 50% of Leisure visitors, compared to 42% of VFR and 41% of Business visitors.
- The most often cited activity (33%) 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.
- Over one in six visitors overall (16%) reported that they had posted an online review. Amongst Leisure visitors the proportion was higher (19%) than VFR (10%) or Business visitors (5%).
- European Leisure visitors were less likely than others to update their Facebook status to include their trip (13%), or to tweet about it (none had done this).
- Respondents within the over 65 year old age group were less likely to have posted on social media (35%) than those in younger age groups.

Online / social media activity during or after trip to Orkney



Base (All, excluding rotational shift workers):
Total 1,146; Leisure 875; VFR 187; Business 75

Q48: During or after your recent trip to Orkney did you do any of the following?

Trip profile

Summary



Leisure visitors

- The profile of trips for Leisure visitors has remained highly consistent since 2017. 86% of Leisure visitors were staying overnight and overnight visitors typically stayed for 1 to 3 nights (45%) or 4 to 7 nights (43%).
- Slightly more stayed in self-catering accommodation (29%) than B&Bs (23%) or hotels (22%).
- Travel around the islands was typically by car.
- Half were visiting as a couple, with their partner/spouse. Around a quarter were in family groups and 12% were travelling alone. Just less than 1 in 10 had children under 16 years old in their group.
- The top attractions were Ring of Brodgar, Skail House/Skara Brae and St Magnus Cathedral.
- The top activities were walking, enjoying the beautiful scenery and archaeological sites.
- Most (84%) reported finding information online during their trip and 41% had been to a visitor information centre.

VFR Visitors

- As with 2017 almost all (98%) were staying overnight – VFR visitors were most likely to be staying on Orkney for 4 to 7 nights (54%).
- Two thirds stayed with friends or relatives.
- 40% of VFR visitors were travelling as a couple, 28% were travelling alone and a further 28% were in a family group. 13% reported that they had children in their group.

Business visitors

- 84% of Business visitors were staying overnight – typically staying for less than 3 nights (65%).
- Most had travelled alone (72%) and stayed in a hotel (59%) and described their accommodation as 'mid-market' (75%).
- Almost all Business visitors (94%) reported visiting Kirkwall, while 53% also visited Stromness and one third went to other parts of the mainland.



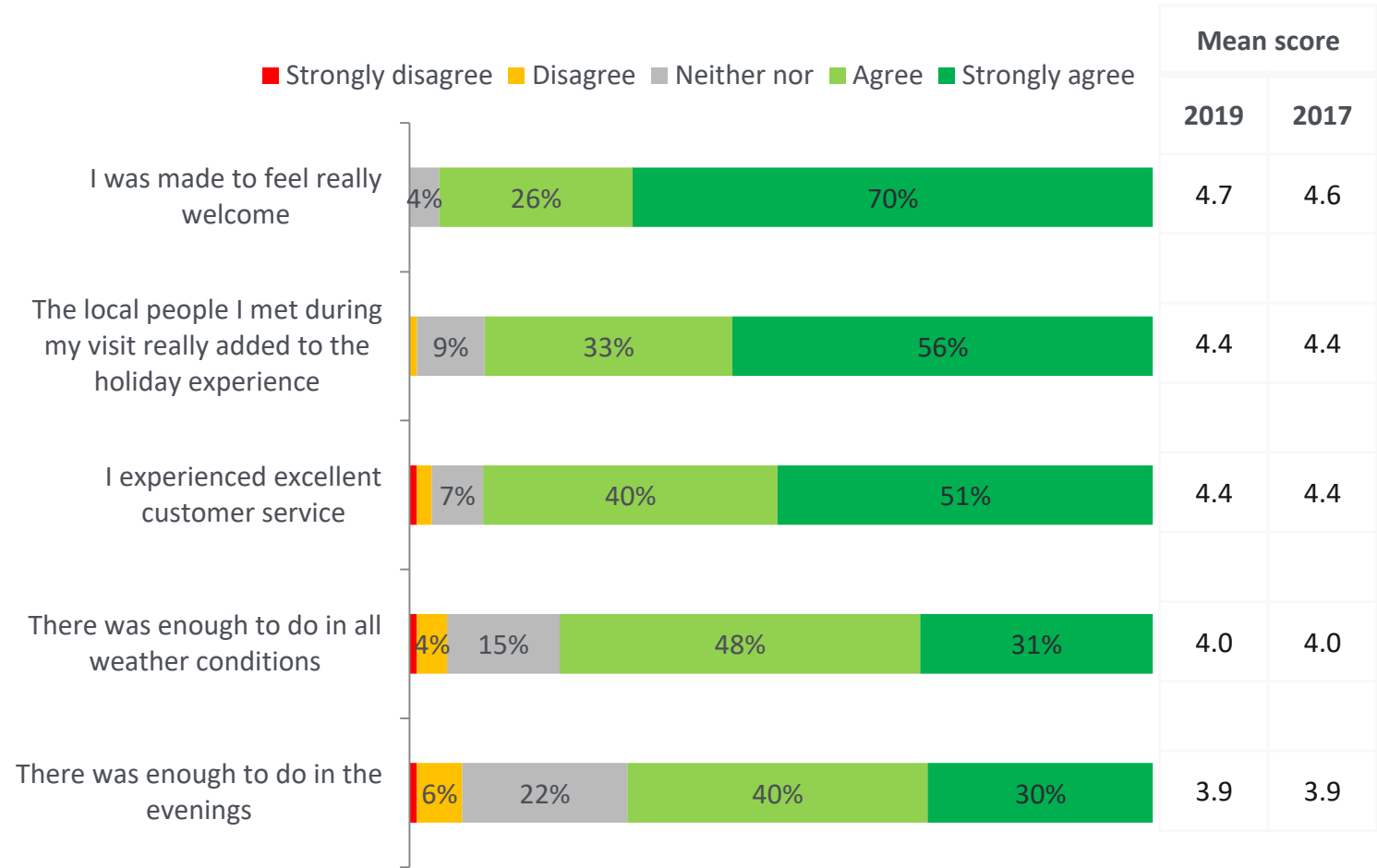
Evaluation of trip experience

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 reported a very positive visitor experience.
- The highest levels of satisfaction 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 excellent customer service. Almost all respondents agreed with these sentiments.
- In particular, almost all respondents agreed that they were made to feel welcome, with 70% agreeing strongly.
- Agreement was weaker that there is enough 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.
- These findings in 2019 closely mirrored the findings of the 2017 survey with no significant difference in agreement with the statements.

Agreement with statements about experience on Orkney – Leisure/VFR



Base (All excluding 'don't know' responses): 884– 1,058

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

Trip evaluation

Overall experience – sub-sample analysis



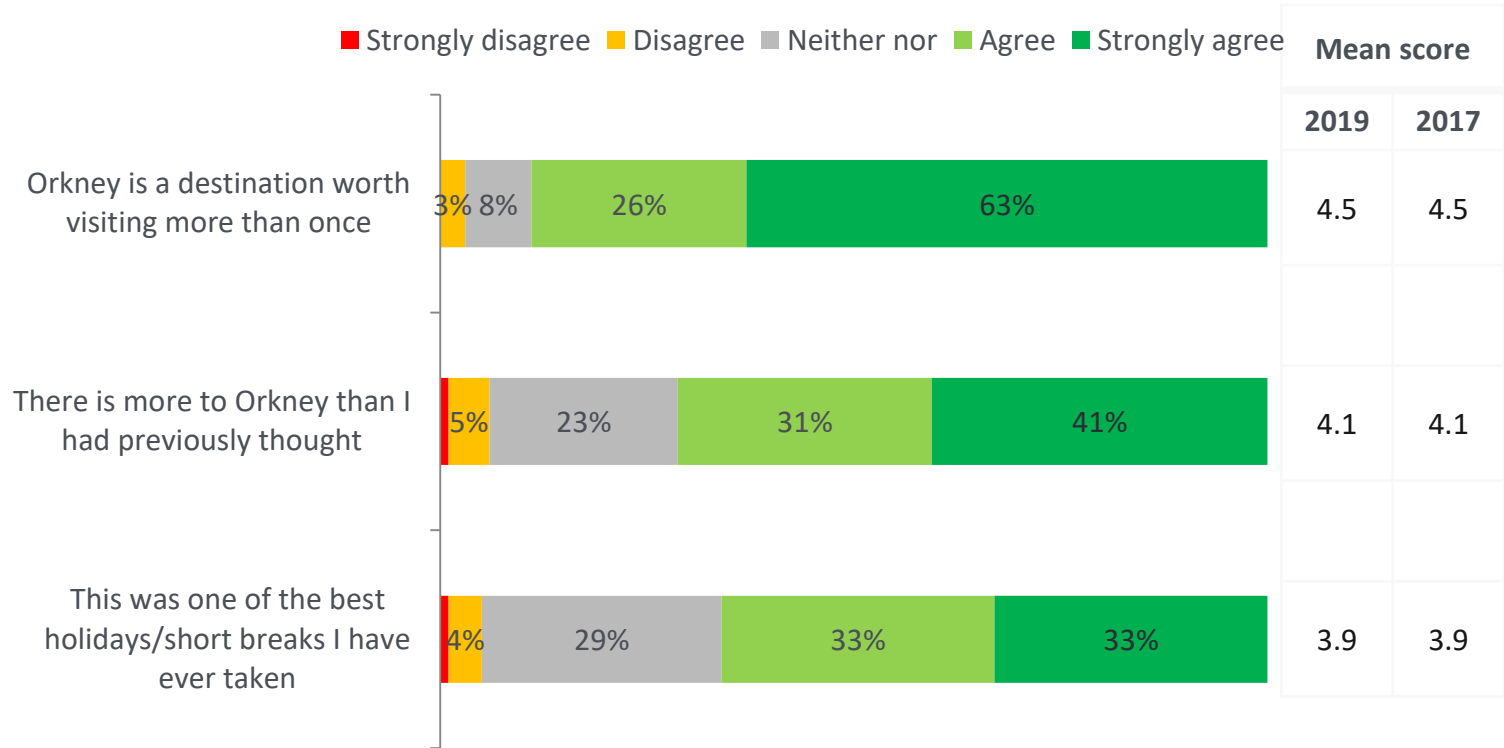
- European Leisure visitors tended to be less positive than visitors from other locations, with higher proportions agreeing rather than agreeing strongly with the statements. Specifically, European visitors were less likely than other visitors to agree strongly that they were made to feel welcome (58%), they experienced excellent customer service (35%) and there was enough to do in the evenings (20%).
- 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, 70% of North American visitors agreed strongly that local people really added to the holiday experience.
- Male Leisure respondents had stronger overall agreement that there was enough to do in the evenings on Orkney (74% agreed or agreed strongly with this statement compared to 65% of females).
- Respondents in the oldest age group (59% of over 65s) were more likely to agree strongly that local people really added to the holiday experience than those in the youngest age group (43% of under 35s).

Trip evaluation

Overall experience

- Nine in ten of the Leisure and VFR visitors (89%) agreed that Orkney is a destination worth visiting more than once (63% agreed strongly), indicating that the islands offer visitors both an excellent experience and a variety of attractions and things to see and do.
- Indeed, 72% agreed that there is more to Orkney than they had previously thought before visiting.
- 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.
- These findings correspond very closely to the findings of the 2017 research which also showed very high levels of satisfaction with the visitor experience.
- Perhaps not surprisingly, Leisure visitors were more likely to agree overall that there was more to Orkney than they thought (74%) than VFR visitors (60%).

Agreement with statements about experience on Orkney – Leisure/VFR



Base (All Leisure/VFR excluding 'don't know' responses): 1,010 – 1,042

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

Q49: Thinking of your experience in Orkney overall, to what extent do you agree or disagree with the following statements?

Trip evaluation

Overall experience – sub-sample analysis



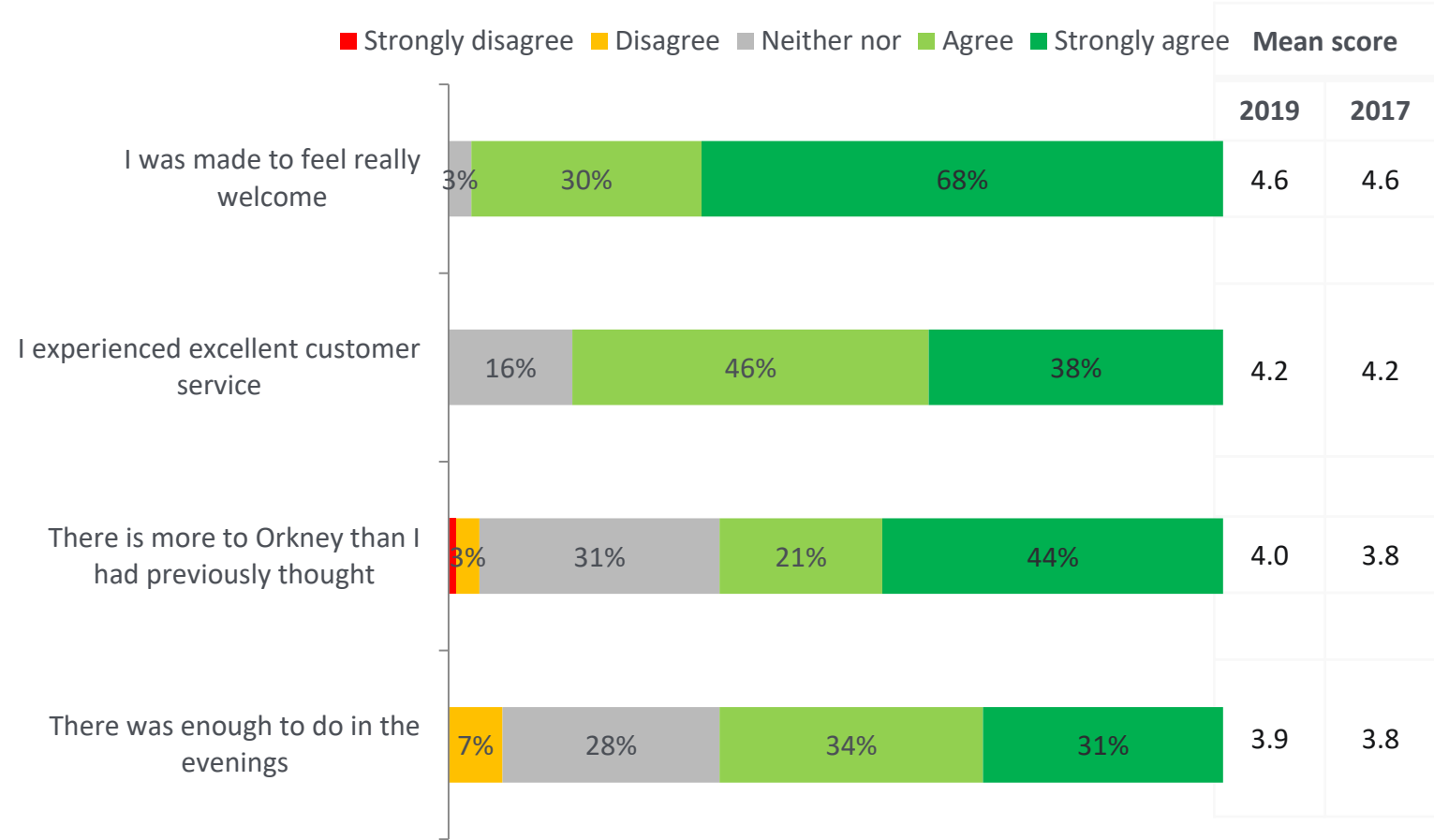
- Whilst overall agreement tended to be similarly high between Leisure visitors from different countries, North American visitors were again the most likely to agree strongly with statements. For example, 60% agreed strongly that there is more to Orkney than previously thought. Overall, 77% agreed that their visit had been one of the best holidays they had ever taken, with 45% agreeing strongly.
- Leisure visitors from Scotland (90%) and the rest of the UK (92%) had higher overall agreement that Orkney is a destination worth visiting more than once, compared to those from overseas (84%).
- 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 47% agreed strongly that Orkney is worth visiting more than once and only 30% agreed strongly that there is more to Orkney than previously thought.
- Female respondents were more likely than males to strongly agree/agree that their visit to Orkney was one of the best holidays or short breaks ever taken (72%, compared to 63% of males).
- The 16-34 age group had the highest agreement that there is more to Orkney than they had previously thought (84%, compared to 70% of those aged 65 and over).

Trip evaluation

Overall experience

- Similar to the Leisure and VFR visitors, Business visitors were very positive about their interactions with local people on their visit to Orkney.
- Almost all Business visitors reported that they were made to feel welcome, and 84% agreed overall that they experienced excellent customer service, although more agreed (46%) than agreed strongly (38%).
- Business visitors were also positive about having enough to do in the evenings; 65% agreed although opinion was split between agree and strongly agree.
- The general positive perceptions from Business visitors is also reflected in the fact that 65% agreed that there is more to Orkney than they had previously thought – with 44% agreeing strongly.
- The 2019 findings for Business visitors were similar to those from 2017 with no statistically significant differences.

Agreement with statements about experience on Orkney – Business visitors



Base (All Business excluding rotational shift workers and 'don't know'): 119 - 129

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

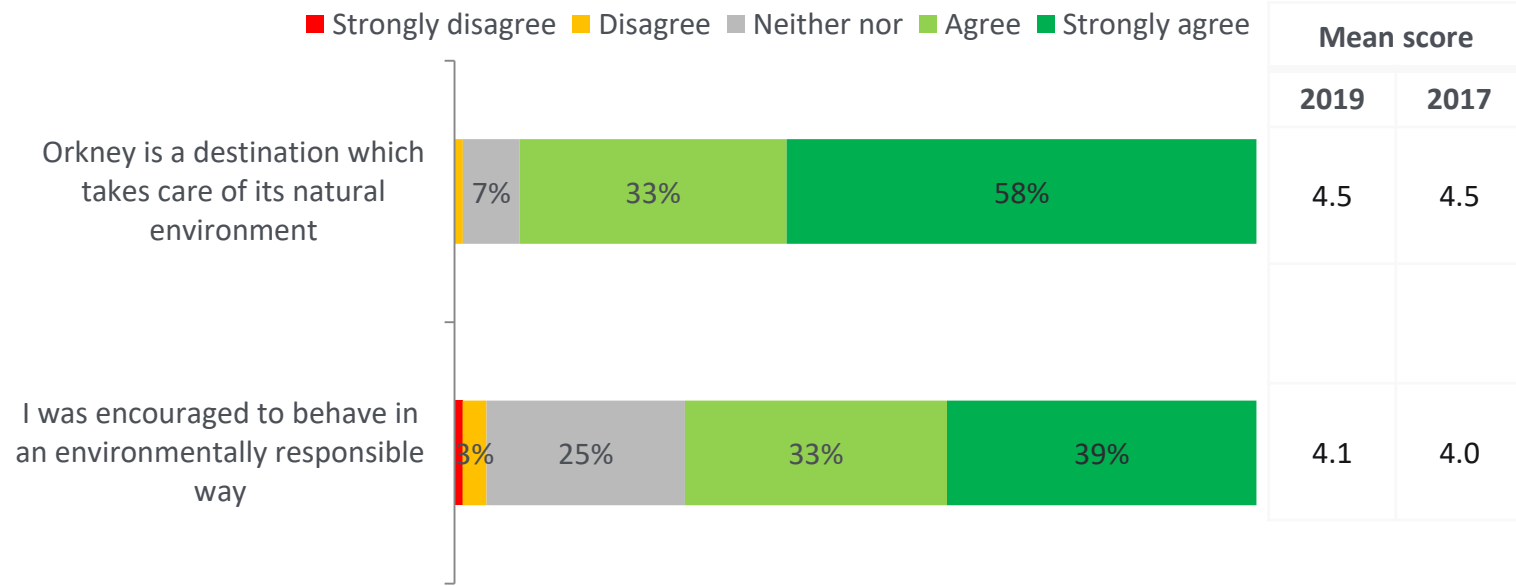
Q49: Thinking of your experience in Orkney overall, to what extent do you agree or disagree with the following statements?

Trip evaluation

Environment

- The majority of visitors shared a perception that Orkney is an environmentally responsible destination.
- 92% of visitors agreed that Orkney takes care of its natural environment, with 58% agreeing strongly. This perception was consistent across Leisure, VFR and Business visitors.
- Almost three quarters (72%) of visitors also agreed that they themselves were encouraged to behave in an environmentally responsible way during their visit. This perception was also consistent across Leisure (73%), VFR (70%) and Business visitors (68%).
- The data is broadly consistent with 2017, with a small increase in those agreeing strongly that they were encouraged to be environmentally responsible – 35% in 2017 to 39% in 2019.
- Leisure visitors from North America were more likely to agree strongly they were encouraged to behave in an environmentally responsible way (57%) than those from other countries (Scotland 36%; rest of UK 37%; Europe 40%).

Agreement with statements about experience on Orkney - Environment



Base (All excluding rotational shift workers and 'don't know'): 1,016 – 1,090

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

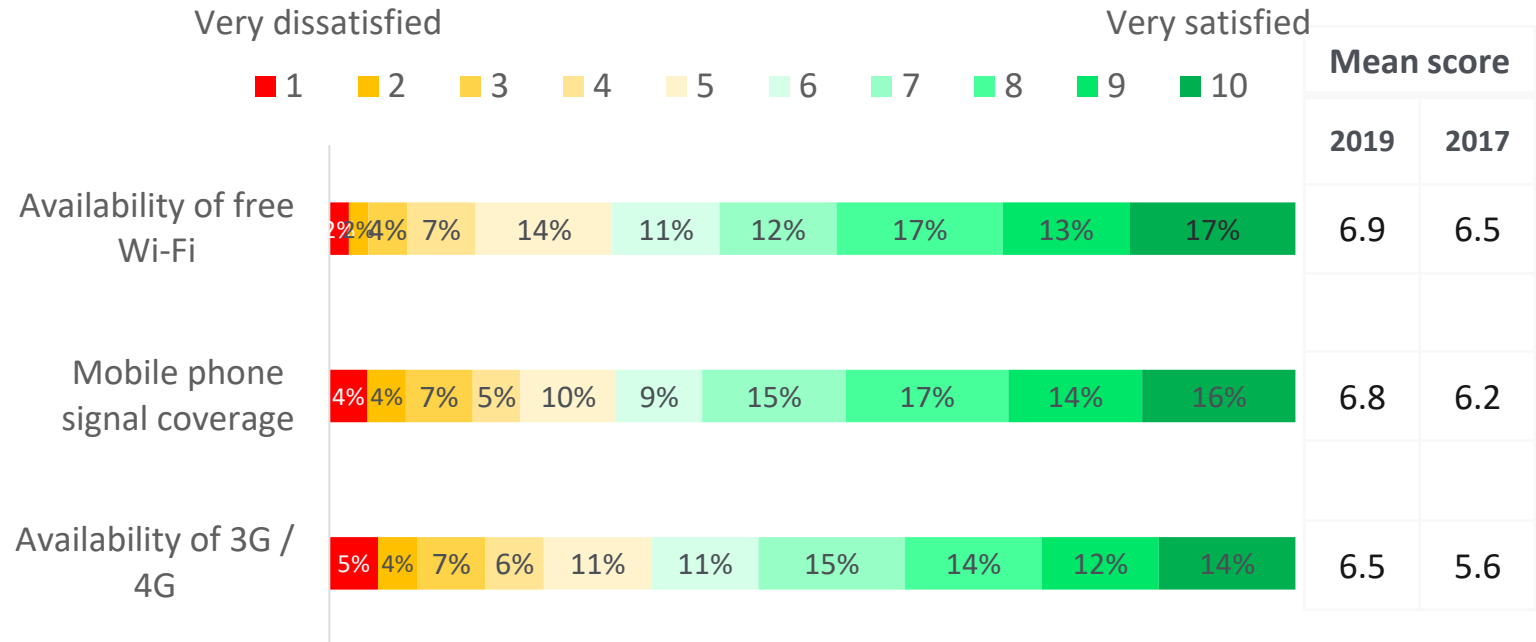
Q49: Thinking of your experience in Orkney overall, to what extent do you agree or disagree with the following statements?

Trip evaluation

Digital coverage

- Visitors were generally fairly satisfied with digital services on Orkney. Wi-Fi and mobile phone coverage were considered good with mean scores of 6.9 and 6.8 out of 10 respectively.
- Nevertheless, there remains some scope for improvement, with 30% scoring 5 or less for mobile phone coverage and 29% scoring 5 or less for Wi-Fi.
- These figures have moved in a positive direction since 2017. In the previous study Wi-Fi availability received a mean score of 6.5 and 35% gave a score of 5 or less. Similarly, satisfaction with mobile phone coverage has improved since 2017 when it received a mean score of 6.2 and 40% gave a score of 5 or less.
- The 2019 wave of research also revealed a significant improvement in satisfaction with 3G/4G coverage. In 2017 opinion was split, with 51% giving a score of more than 5 and 49% scoring 5 or less (mean score – 5.6). In 2019 only 33% gave a low score of 5 or less and 67% scored 3G/4G with a score of 6 to 10 (the overall mean score was 6.5).
- Leisure visitors from North America tended to be more satisfied with digital coverage than those from elsewhere, particularly the availability of free Wi-Fi which received a mean score of 7.6 from the group.

Satisfaction with digital coverage



Base (All excluding rotational shift workers and 'don't know'): 923 – 1,040

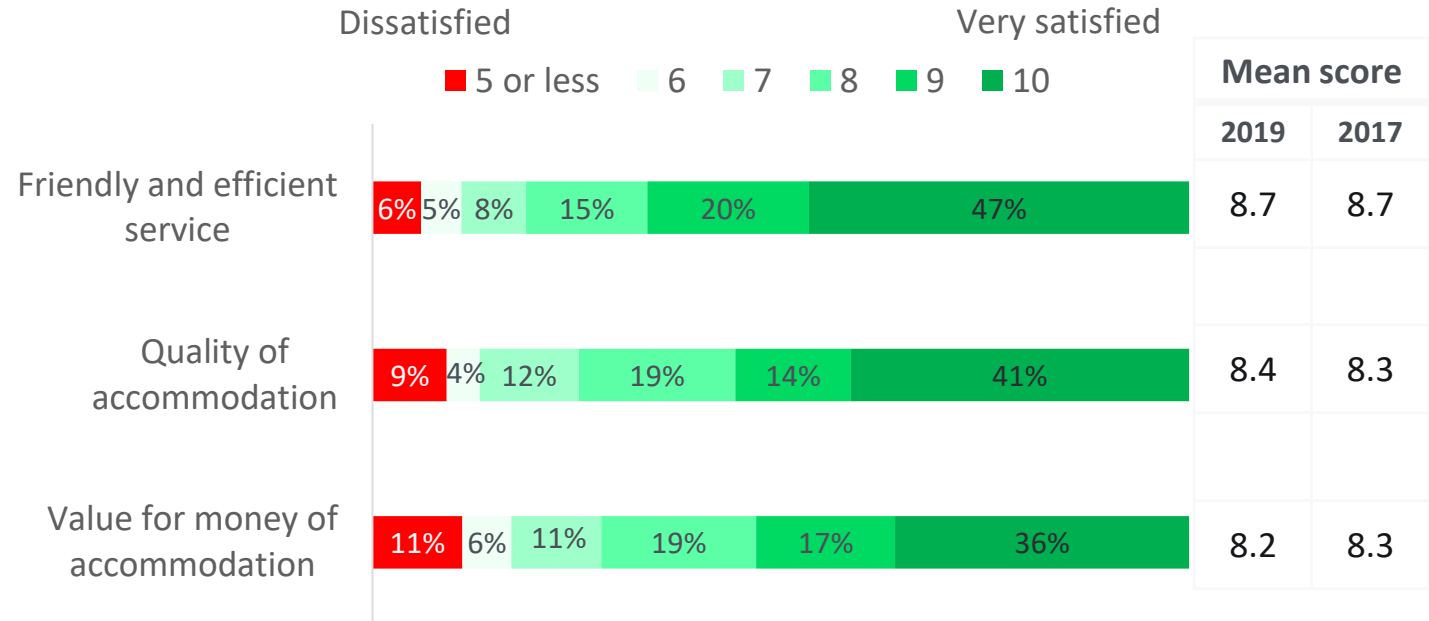
Mean score calculated, whereby 1 is extremely dissatisfied and 10 is extremely satisfied.

Trip evaluation

Accommodation

- In general, visitors were satisfied with the quality, value for money and service received at their accommodation. In particular, the majority (67%) 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.
- The findings are very similar to 2017, with a slight increase in satisfaction with the quality of accommodation – 36% scored 10 in 2017 compared to 41% in 2019.
- Satisfaction tended to be higher for Leisure and VFR visitors than for Business visitors, although the majority of Business visitors were positive about their accommodation.
- Leisure visitors from Europe were less likely to give 10 out of 10 scores than those from the UK or other countries. For example, only 19% rated value for money as 10, compared to 46% of North American visitors, 42% of rest of UK visitors and 38% of visitors from Scotland. Nevertheless, overall mean scores for visitors from Europe were high, ranging from 7.9 (value for money) to 8.5 (friendly and efficient service).

Satisfaction with accommodation



Base (All staying in paid accommodation excluding 'don't know'): 754 - 777

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

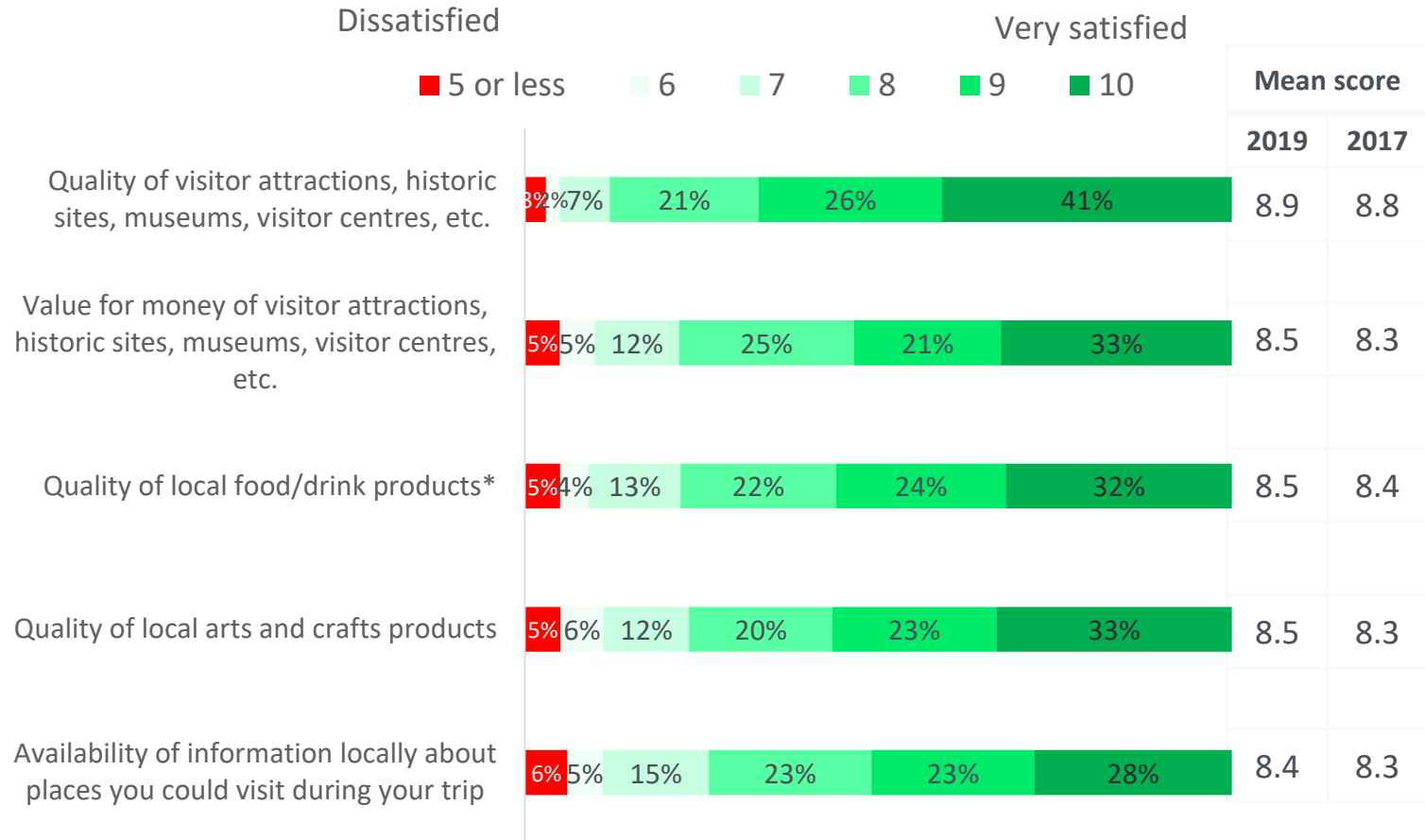
Q51: Thinking about the accommodation you stayed in, how satisfied were you with the following aspects of your accommodation?

Trip evaluation

Satisfaction with aspects of trip

- The majority of visitors reported they were satisfied with various aspects of their trip to Orkney. Indeed, all of the aspects listed opposite attracted mean scores of over 8 out of 10 in terms of satisfaction.
- The quality of visitor attractions, such as historic sites and museums, was the mostly highly rated aspect – 67% of visitors scored this with 9 or 10 out of 10. Attractions on Orkney 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 8.4 across the sample.
- There have been some improvements in satisfaction scores since the 2017 wave of research. For example, 27% rated the quality of food and drink with a score of 10 in 2017 compared to 32% in 2019.

Satisfaction with key aspects of trip



*Includes business visitors.

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

Base (All, excluding 'don't know'): 790 – 1,050

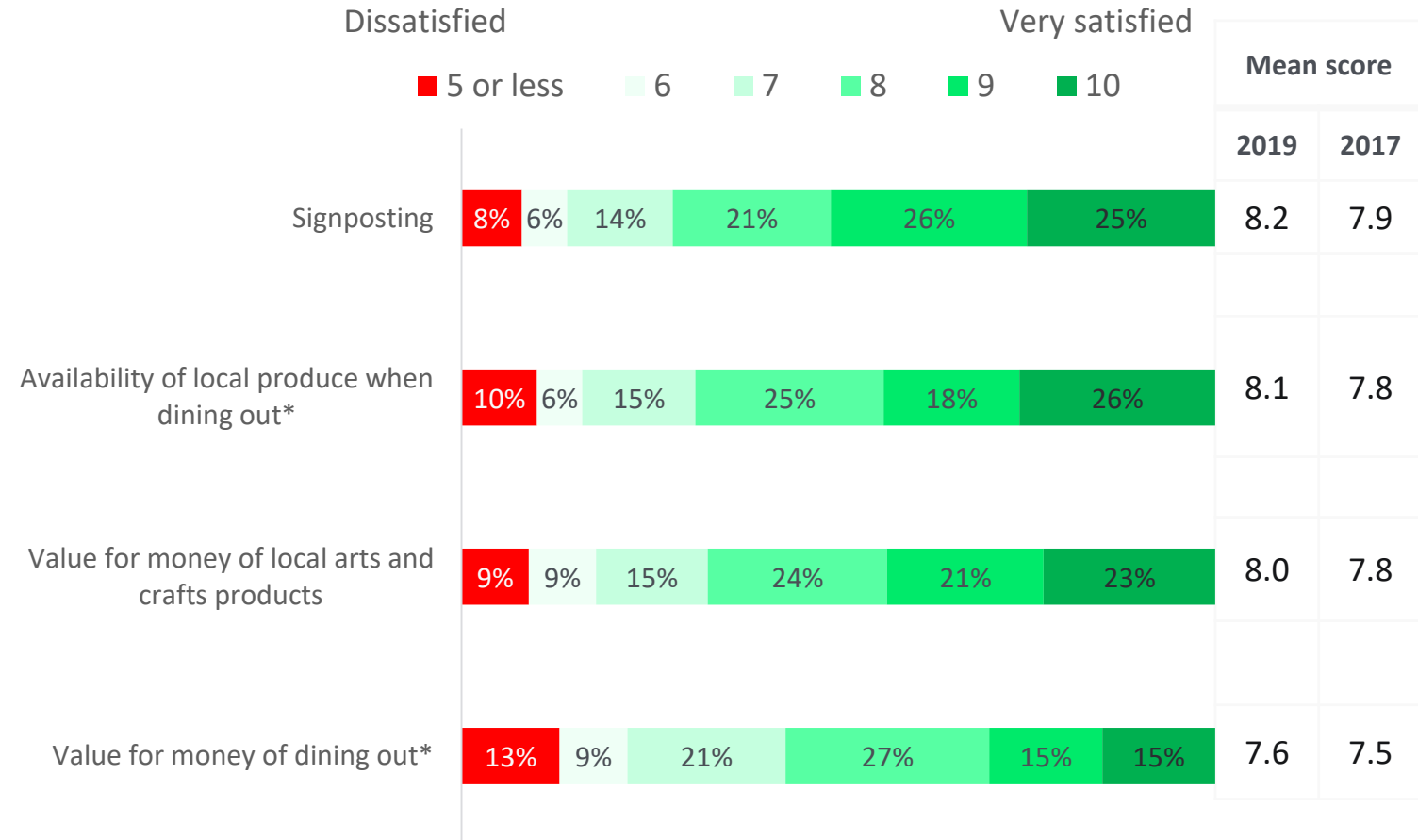
Trip evaluation

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 on average 8 out of 10.
- The value for money of dining out scored slightly lower compared to some other aspects, suggesting that, for some, eating out was expensive.



Satisfaction with key aspects of trip



*Includes business visitors.

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

Base (All, excluding 'don't know'): 764 – 1,041

Trip evaluation

Satisfaction with aspects of trip – sub-sample analysis



- Amongst Leisure visitors, satisfaction with accommodation varied across age groups with those 65 and over most likely to be very satisfied (i.e. to have scored accommodation an 8, 9 or 10 out of 10) compared to those aged under 35. For example, 62% of 16-34 years olds were very satisfied (scoring 8, 9 or 10) with the quality of their accommodation and 61% with its value for money. In contrast 80% of the 65+ age group were very satisfied with quality and 82% with the value for money of their accommodation. Visitors from the Rest of the UK also had higher than average satisfaction with accommodation with 82% very satisfied with quality of their accommodation and 81% with value for money.
- When asked to rate other aspects of their visit female respondents tended to state slightly higher levels of satisfaction than males. For example, 80% of females gave a score of 8 to 10 for the quality of local arts and crafts products, compared to 70% of males. Similarly, 62% of females scored 7 or more for the value for money of dining out, compared to 54% of males.
- Visitors from Europe tended to give lower satisfaction scores than those from other countries, for example, 64% of this group were very satisfied (scoring 8, 9 or 10) with the availability of information locally compared to an average across Leisure visitors of 74%. Again those from North America tended to have higher satisfaction levels – for example 96% were very satisfied with the quality of visitor attractions (average across Leisure visitors = 88%).

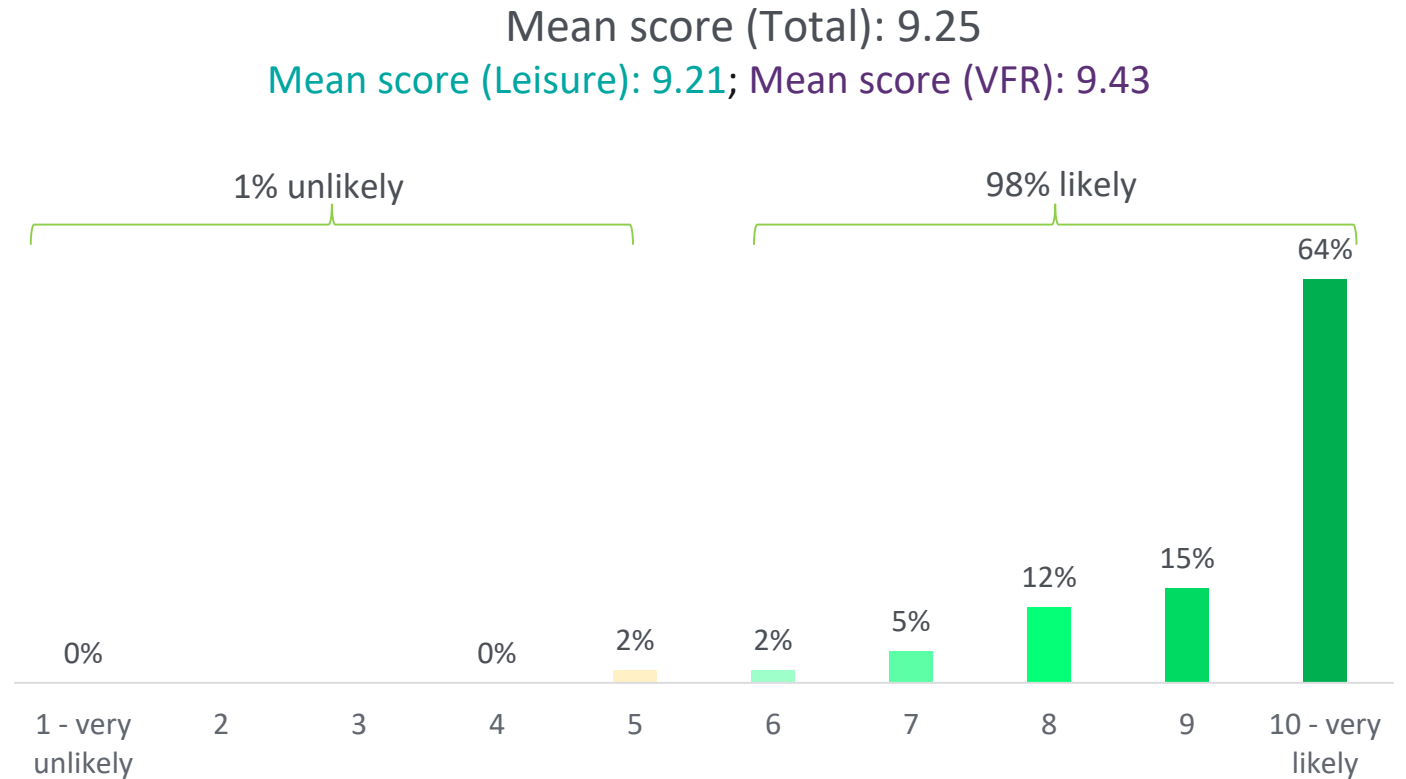
Trip evaluation

Recommendation

- Leisure and VFR visitors were asked if they would recommend Orkney as a holiday destination. It is a reflection of the quality of the visitor experience that almost all reported that they would. Indeed, 64% gave a perfect 10 out of 10 recommendation score.
- The likelihood to recommend Orkney in 2019 was very similar to 2017, when 62% scored 10 and the mean score was 9.22.
- Findings were similarly positive for both Leisure and VFR visitors, however, VFR visitors were more likely to provide a score of 10 (73%, compared to 61% of Leisure visitors).
- Amongst Leisure visitors, visitors from Scotland (67%) and the rest of the UK (69%) were more likely to score 10 out of 10 than those from overseas (52%). However, as we found in 2017, visitors from North America were significantly more likely to score 10 (73%) than those from Europe (39%) or other overseas countries (60%).
- Females were more likely to score 10 (65%) than males (58%).



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



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

Base (All Leisure/ VFR, excluding 'don't know'): 1,063

Q53: 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?

Trip evaluation

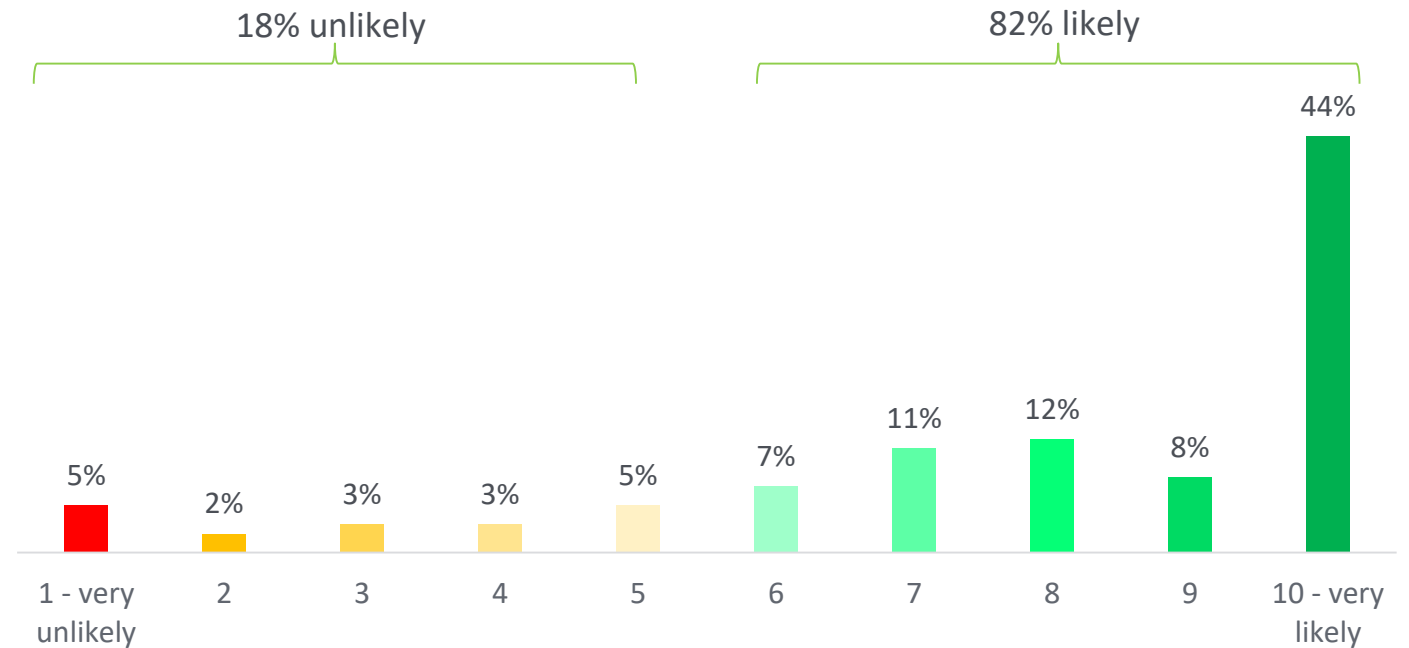
Return visit

- 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 - 82% scored 6 or more out of 10, with 44% scoring 10 out of 10 indicating that it is highly likely.
- Likelihood to return to Orkney in 2019 closely mirrored the data from 2017 when 83% scored 6 or more and 46% scored 10. The overall mean score in 2017 was also very similar at 7.93.
- As we found in 2017, the findings in 2019 varied by visitor type. VFR visitors were the most likely to anticipate a return visit (80% 10 out of 10; mean score 9.41). Business visitors expressed a slightly higher propensity to return to Orkney (mean score 7.95) than Leisure visitors (7.40).
- 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.

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



Mean score (Total): 7.83
 Leisure: 7.40; VFR: 9.41; Business 7.95



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

Base (All excluding 'don't know'): 1,125

Q54: 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?

Trip evaluation

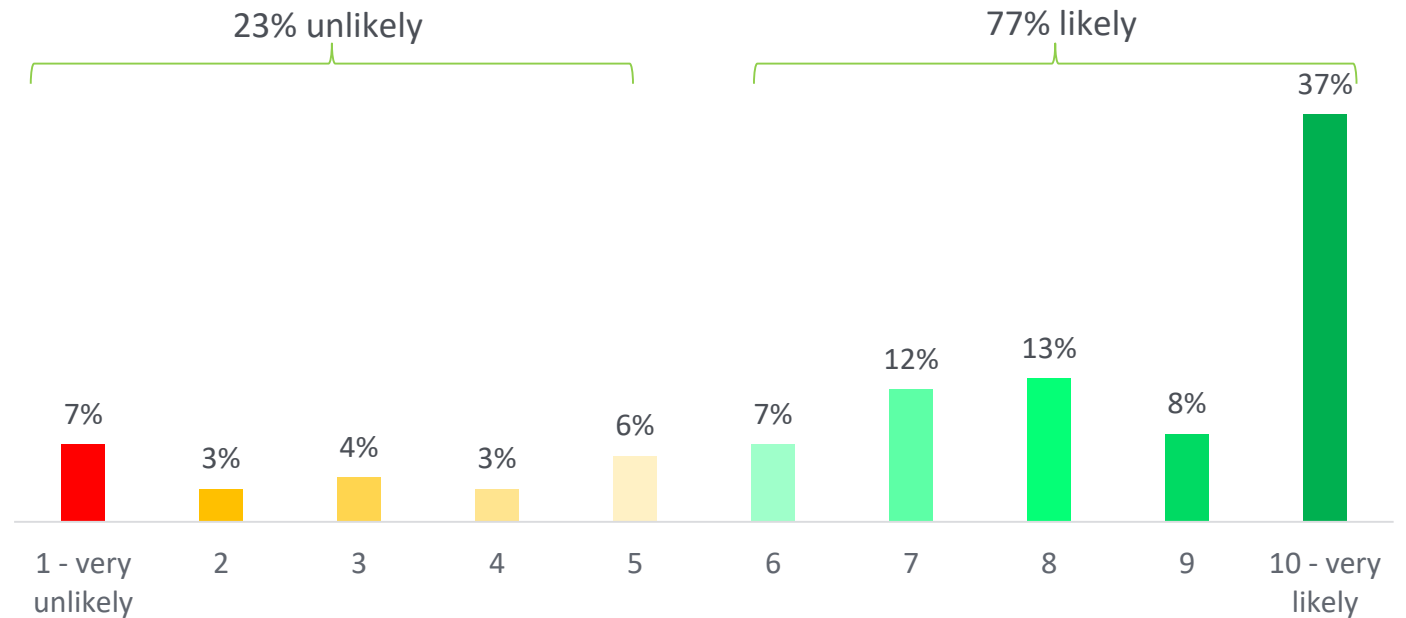
Return visit

- Over three quarters of Leisure visitors considered it likely that they would return to Orkney within 5 years, giving a score of 6 or more. The attitudes of Leisure visitors in 2019 were similar to 2017, when 79% scored 6 or more and 39% gave a score of 10.
- As we would expect, visitors from Scotland (51%) and the rest of the UK (44%) were more likely to score 10 out of 10 than those from overseas (23%). In 2019 there has been a decrease in the proportion of Scotland visitors scoring 10 compared to 2017 (61%).
- Female respondents were more likely to provide a score of 10 (42%) than males (33%).

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



Mean score (Leisure): 7.40



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

Base (All Leisure excluding 'don't know'): 823

Q54: 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?

Trip evaluation

Highlight

- When asked to specify, in their own words, the highlight of their trip to Orkney, the highest proportions of respondents mentioned its history and archaeology (37%) or specific attractions/places (35%).
- Around a fifth also mentioned the landscape and scenery. Many mentioned the coastline and beaches, as well as noting how unspoilt the islands are.
- One tenth of the Leisure and VFR visitors also mentioned interactions with the local islanders. Many spoke of the warm welcome they received from people on Orkney and the knowledge of staff at attractions and accommodation.
- The highlights mentioned in 2019 were very similar to those mentioned in 2017. The only difference was fewer mentions of specific attractions/places in 2019 (42% in 2017 and 35% in 2019).

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



Open ended question grouped by theme	%
History / archaeology	37%
Attraction / specific places, e.g. Skara Brae, Stromness, Italian Chapel, etc.	35%
Scenery / beauty / landscape / views	19%
Nice people / locals / community	10%
Wildlife	9%
Visiting family / friends	7%
Peace / quiet / relaxation / remote	6%
Walks	5%
Beaches	3%
Food & drink	3%
Events	3%
Good weather	3%
Tour/tour guide	2%
Local crafts/shops	2%
Ease of transport	1%
Accommodation	1%
Public facilities	1%
Fishing	1%
Cycling	1%
Golf	1%
Cleanliness	1%

Q56 - What was the highlight of your visit to Orkney or the single thing that you enjoyed or appreciated most?

Trip evaluation

Highlight – examples of verbatim comments



Talking to a local who has lived on the island all her life. Listening to her talk about the history was just amazing. Could have stayed with her all day.

Orkney is a unique place. Beautiful and inspiring. Wonderful in every way. Would move to live in Orkney.

The museum in Kirkwall was fantastic and the staff there particularly friendly. Overall the people were the highlight, so welcoming.

As a National Trust and Historic Scotland member and a historian Orkney is a treasure trove. I also love the scenery.

I was impressed by the bus service which is how I got around. The buses seemed to meet up with the ferries and I particularly like the bus to Skerry Brae and the Ring of stones, which gave plenty of time to visit the sights/sites.

The scenery, the heritage, the locals, the condition of the roads, the food and drink, overall the experience of Orkney was amazing and we will all return! Can't wait!!

I enjoyed every minute, really, but the scenery was breath-taking and I want to spend a day relaxing on Evie beach someday!

Sorry I can't pick one. The scenery was stunning, and the archaeological sites surpassed my expectations. We were cycling, and its ideal cycling terrain.

Trip evaluation

Highlight

- For Business visitors the scenery and landscape (39%) and the local people (35%) were the most enjoyable aspects of their trip.
- Around 1 in 7 also mentioned the food and drink they experienced on Orkney as a highlight.

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



Open ended question grouped by theme	%
Scenery / beauty / landscape / views	39%
Nice people / locals / community	35%
Nothing	16%
Food & drink	15%
Peace / quiet / relaxation	8%
History	8%
Ease of travel	8%
Local crafts/shops	6%
Attractions	6%
Walks	4%
Wildlife	4%
Museums	1%
Hotel staff	1%
Fresh air	1%
Events	1%
Attraction / specific places	1%

Trip evaluation

Improvements

- When asked about suggested improvements, 54% gave a response.
- Of those who responded, almost one fifth suggested improvements related to signage and information. These comments included:
 - Better road signs to attractions/sights
 - Better signage to footpaths/walks
 - More information on what needs to be booked in advance, e.g. ferries, attractions
 - More information about outer islands and inter-island ferries
- A number of visitors also suggested improvements to transport/travel:
 - Less expensive ferries
 - Better transport links between islands
 - More regular ferries to the islands, later in evening
 - More regular public transport to get around the island, especially to attractions
- Other suggested improvements included more restaurants and better food options, specifically:
 - Local produce, e.g. seafood
 - Better quality options
 - More choice and longer opening hours
- In total, 13% mentioned an improvement relating to internet availability or mobile phone coverage.

Suggested improvements (open-ended)



Open ended question grouped by theme	%
Better signage/information	19%
Travel improvements	15%
More or better restaurants/pubs/food & drink options/local food	14%
Better Internet/mobile phone coverage	13%
Opening hours	5%
Accommodation quality	5%
More things to do / entertainment	4%
Reduce number of tourists	3%
Reduce number of cruise ships	3%
Improvements to attractions (e.g. costs/booking/range available)	3%
Better parking	3%
Lack of shops/produce	3%
Better footpaths/cycle paths	2%
Prices too high	2%
Improved road infrastructure	2%
Bins and litter/recycling	2%
Lack of public toilets	2%
Lack of campervan/camping facilities	2%
Better customer service	2%
Weather	2%
Other individual comments	9%

Base (All who gave a response, excluding rotational shift workers): 621

Trip evaluation



Improvements – examples of verbatim comments

Better signposting of walking routes and accessibility on these routes.

The quality of WI-FI connection was poor - although it was freely available in many locations, connectivity wasn't great.

Better bus services - on two occasions scheduled buses did not arrive meaning the inter island ferry was missed twice

More restaurants or easier access to a table in one of the existing restaurants. It was very annoying finding a restaurant and then get a table without having made a reservation in advance. Especially the selection in Stromness was very poor. Some of the restaurants/tea houses were closed on a normal Wednesday for example.

The lack of restaurants selling locally caught fish was a surprise as I had expected a large choice

More evening activities other than pubs & restaurants

Opening times of local attractions for example distilleries

Hiring a car would have enabled us to reach our destinations more quickly and with less dependence on bus times etc. Some places we were unable to visit because of lack of public transport and lack of time to walk the necessary distance and back.

Larger road signage or signage warning as we felt that sometimes we went past places and then had to double back.

Tourist information staff were excellent but busy. Leaflets about where to reach places by public transport with links to nearby places accessible by bus or ferry would help as we had no car. Could not fault Orkney as it was a wonderful experience, thank you.

Trip evaluation

Negative Experience

- Just over one quarter of respondents (26%) made a comment when asked to state if anything had negatively impacted their experience.
- No individual complaint stood out as being a problem for a large proportion of visitors; instead a number of separate concerns were highlighted.
- The most frequently mentioned aspects that had a negative impact on visitors' experience were the numbers of other visitors at sites (15%) and the weather (14%). In reference to the number of visitors, many respondents mentioned cruise ship passengers and coaches at key sites.
- Approximately one tenth of those who mentioned a negative experience cited transport issues. These included expensive ferries to other islands and limitations of bus timetables (especially in the evening).
- Comparing the open ended findings to 2017, the overall proportion citing a negative experience was consistent (24% in 2017). There were fewer mentions of overcrowding in 2017 (11%) and more mentions of issues with transport (15%).

Negative experience during the visit (open-ended)



Open ended question grouped by theme	%
Busy / tourists / cruise ships	15%
Weather	14%
Local business (bad experience at)	9%
Transport options / quality / cost	9%
Food / drink / restaurant / cafe	8%
Accommodation	7%
Opening hours / seasonal opening issues	6%
Signs (lack of)	5%
Internet / telephone	4%
Litter/environment/cleanliness	3%
Attraction issues	2%
Costs of goods/services (e.g. taxi hire/clothing on sale etc.)	2%
Lack of toilets	2%
Lack of other facilities	2%
Lack of information	1%
Parking	1%
Roads / paths	1%
Lack of dog friendly places	1%
Lack of local products	1%
Other individual comments	11%

Q59 - Was there anything you encountered during your visit that impacted negatively on your visitor experience?

Trip evaluation



Negative experience – examples of verbatim comments

Expensive accommodation compared with elsewhere in Scotland, although this is partly understandable due to costs related to isolation/transporting goods.

Volume of people from cruise ships at sites. Inability to access monuments due to volume of people. 146 ships visiting this summer, can only have a negative impact on the island

I missed some good quality restaurants, looking nice and serving good midrange food.

Not your fault but the weather was poor - that would be a reason for not going back to be fair - it is a long way to go for constant rain. It isn't really the most welcoming place - I get the impression that even though tourism is important it is still resented by many.

Just the strong difficulty to move with public transport. You constraint tourists in using private tours.

Some published hikes were hard to find

Huge tour buses on narrow roads and crowds from cruise boats

The fact that Stromness shops mostly close at 5, and there is only one takeaway meant that we had to put more effort into planning meals each day than I'd like and couldn't be spontaneous.

Had some brilliant quality local food and drink, which was at times undermined by variable standards of service. I don't underestimate the challenge here, but I think higher spending international visitors would expect more.

Trip evaluation

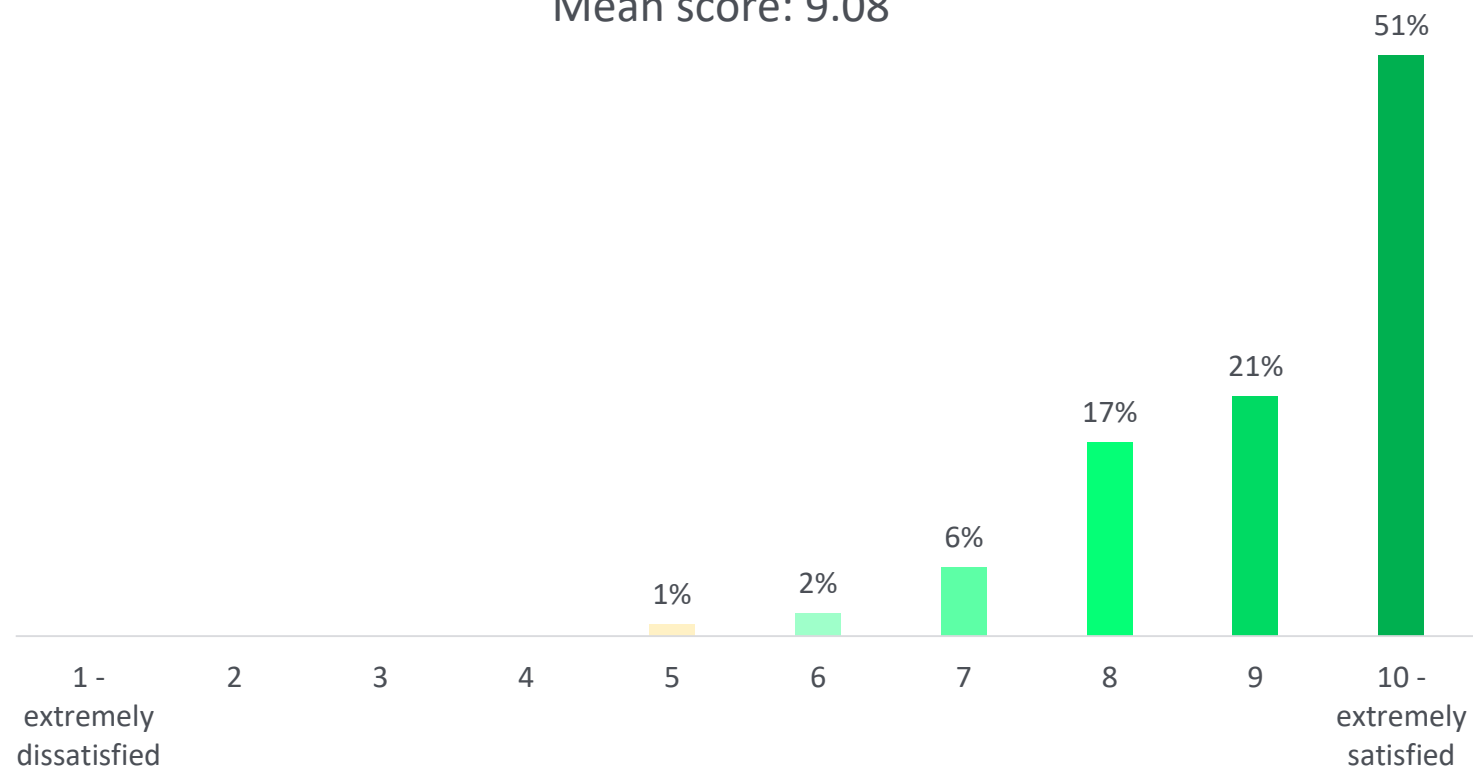
Overall satisfaction

- When asked to rate how satisfied they were with their overall visit to Orkney, respondents provided highly positive scores; 90% of respondents gave a score of 8, 9 or 10, with half scoring their visit with a perfect 10 out of 10.
- This high level of satisfaction was reflected across all visitor types, however, VFR visitors were the most likely to score 10, as detailed over.
- The scale used in the previous survey in 2017 was different so direct comparisons are not possible. However, a similar high level of satisfaction was noted in 2017, with 79% very satisfied and 17% quite satisfied.

Overall, how satisfied were with your trip to Orkney?



Mean score: 9.08



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

Base (All excluding 'don't know'): 1,187

Trip evaluation

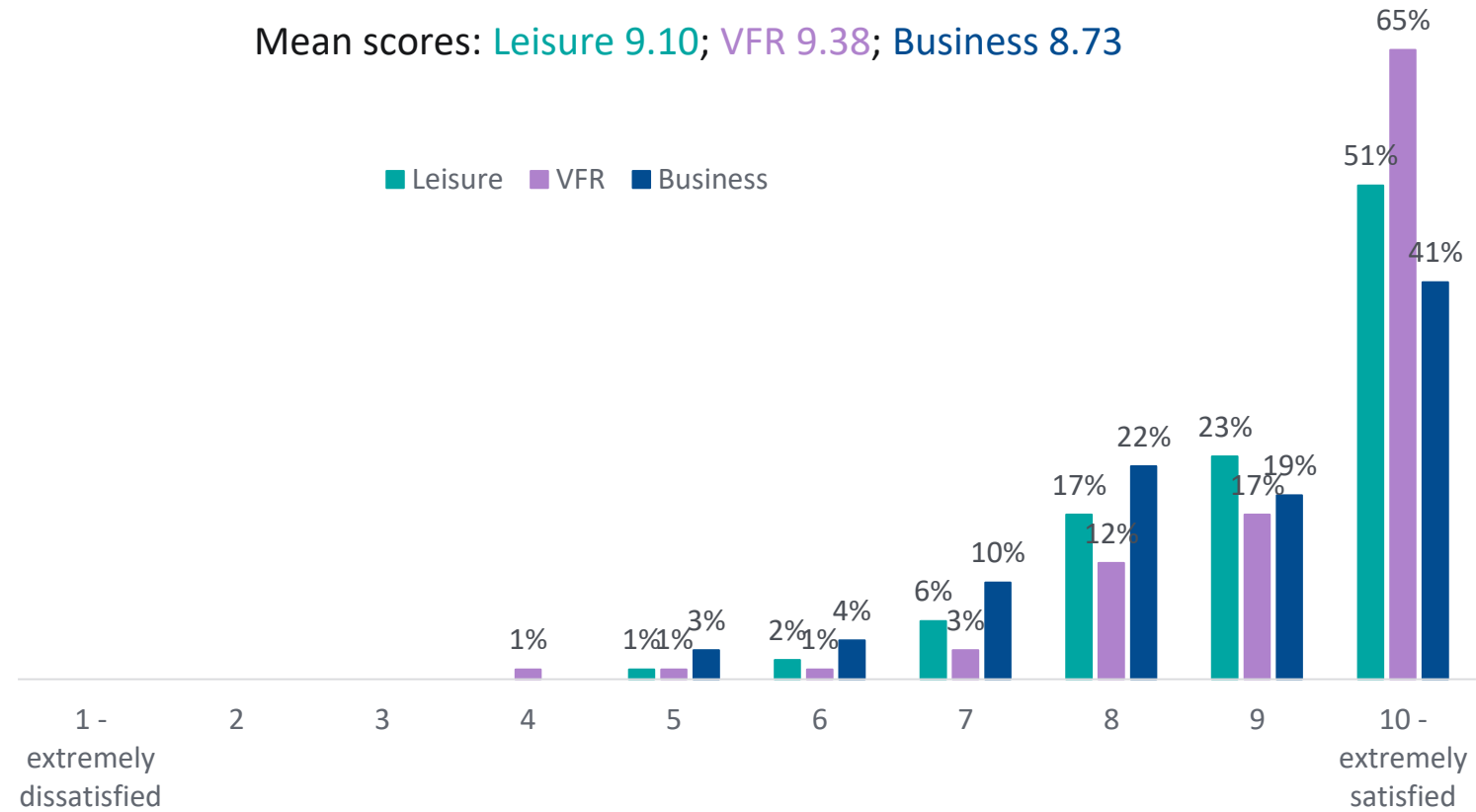
Overall satisfaction

- VFR visitors had the highest level of satisfaction with their trip, with 65% scoring it with 10 and a mean score of 9.38. The majority of Leisure visitors also reported that they were very satisfied with their visitor experience on Orkney – almost three quarters scored 9 or 10, with an overall mean score of 9.10.
- Perhaps unsurprisingly, Business visitors were slightly less enthusiastic, although the vast majority were satisfied (82% scored 8, 9 or 10).
- Within the sample of Leisure visitors, respondents from North America (65%) and the rest of the UK (61%) were more likely to provide a 10 out of 10 score than respondents from Scotland (50%), Europe (32%) or other parts of the world (44%). Nevertheless, the mean scores for the samples from all locations were high at around 9 – Scotland 9.1; rest of UK 9.3; Europe 8.7; North America 9.4; other overseas 9.1.
- Amongst Leisure visitors, female respondents were more likely to score 10 (57%) than males (45%). Those in the over 65 year old age group were also more likely to score 10 (57%) than those in the youngest age group (35% of under 35s).



Overall, how satisfied were with your trip to Orkney?

Mean scores: Leisure 9.10; VFR 9.38; Business 8.73



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


Base (All excluding 'Don't know') Leisure: 875, VFR: 187, Business; 116

Trip evaluation

Summary



- Satisfaction with the experience of visiting Orkney remains very high.
 - 67% agreed it was one of the best holidays they had ever taken
 - 73% scored their overall satisfaction 9 or 10 out of 10
 - 78% 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 – 96% agreed they were made to feel welcome, 89% that the local people really added to their trip and 91% that they had 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 – 58% of Leisure visitors provided a score of 8 or more out of 10 for intention to revisit in the next 5 years.
- Satisfaction with digital services on Orkney has moved in a positive direction since 2017 but there remains some scope for improvement, with 30% scoring 5 or less for mobile phone coverage and 29% scoring 5 or less for Wi-Fi.
- Open-ended analysis also suggests that some visitors would like to see signage improvements, as well as a wider selection of restaurants and cafes. Similar to the 2017 survey, some visitors also mentioned overcrowding due to the number of cruise ship passengers at key sites.



Volume and value

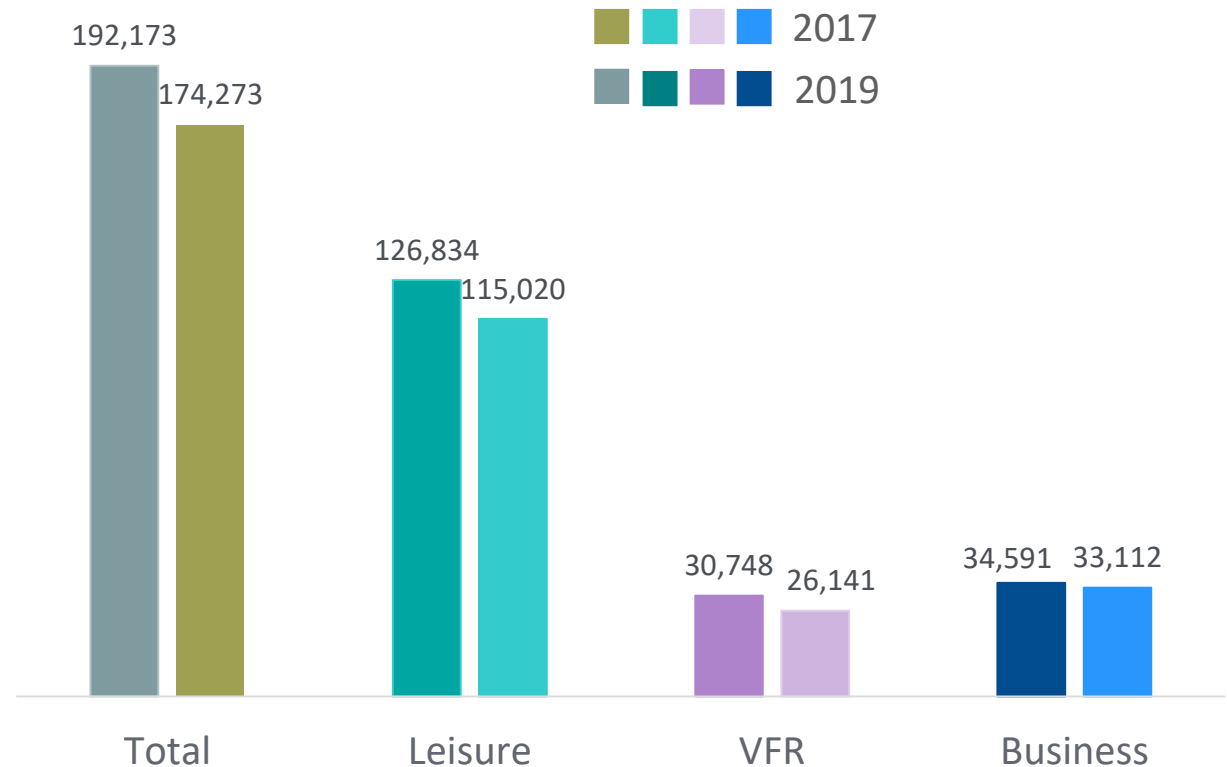
Volume and value

Visit numbers



- Total departing passenger numbers for 2019 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 – 67%.
- The total number of visits to Orkney in 2019 was 192,173. This is an increase of 10.3% in visitors since 2017.
- 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.
- The largest increase in visits in 2019 was for VFR visits, which has seen an 17.6% increase. The number of Leisure visits increased by 10.3% and Business visits increased by 4.5%.

Numbers of visits to Orkney Islands in 2019



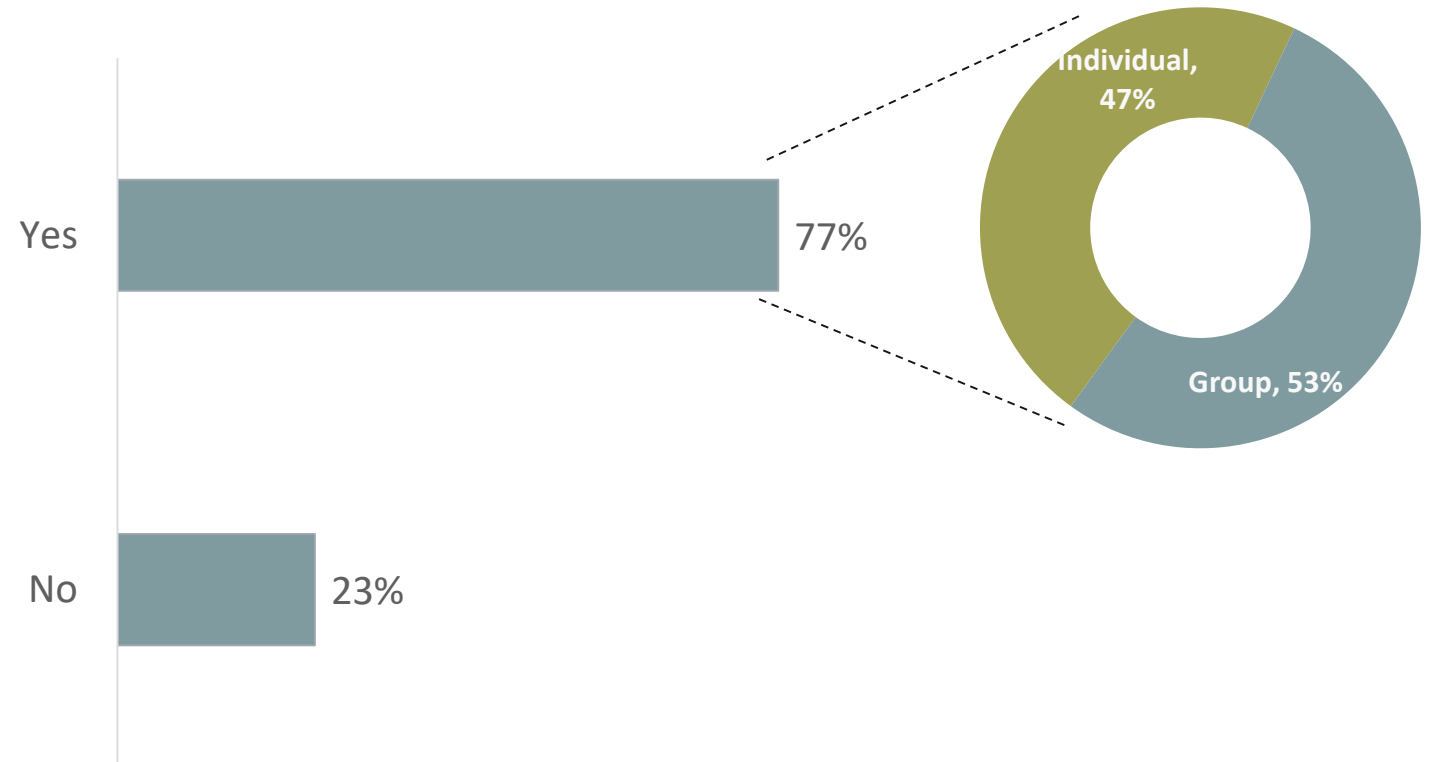
*Figures are shown for the number of 'visits' to the islands, rather than the number of 'visitors'. This is because some visitors may make more than one trip over the course of the year. This means that we cannot estimate the number of discrete visitors but can provide estimated data on the number of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

Volume and value

Provision of spend data

- In total, 77% 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.
- Just less than half of respondents provided individual spend figures and just over 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?



Q29: Firstly, is it easier for you to provide your own individual spend for the trip or the total spend for your group?

Base (All): 1,187

Volume and value

Average spend

- The data tabulated opposite shows the total average spend per person for their whole 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 (£133.70), followed by travel from the Scottish mainland (£111.86).
- The overall average spend per person was £531.59. 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



Total average spend per person - £531.59



Base (All who provided spend data): 828

Q33: 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

Average spend

- The total average spend per person on the Orkney Islands was £350.60.
- 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.
- There have been increases in the average spend per person across most spend categories compared to 2017. For example, the average spend per person on accommodation in 2017 was £106, food and drink was £56, shopping was £34 and entertainment was £18.
- Leisure visitors from the rest of the UK had a higher average spend (£419.50) than those from Scotland (£368.40) or overseas (£350.72).
- 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



Total average spend per person on Orkney Islands - £350.60



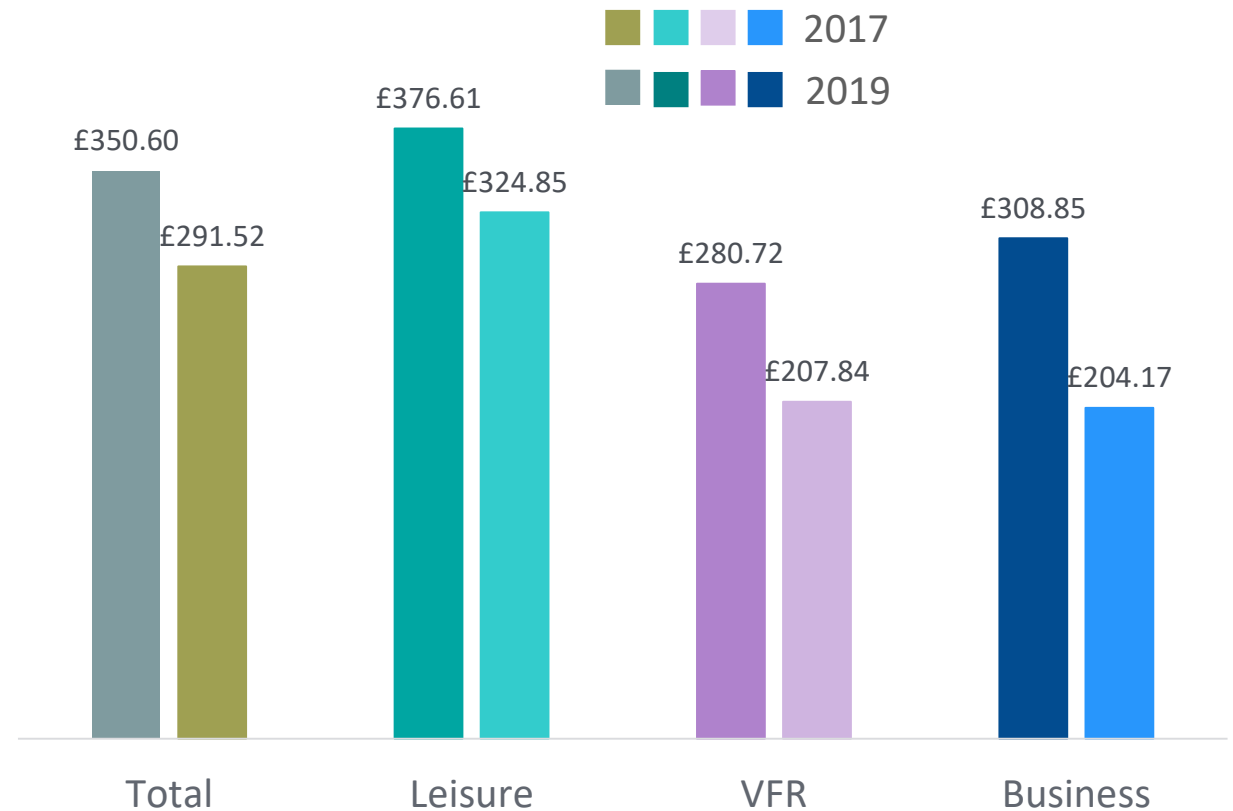
Base (All who provided spend data): 828

Volume and value

Average spend

- Leisure visitors had the highest average spend per person per trip at £376.61.
- Business visitors also had a high average spend per person £308.85, which is a significant increase on 2017.
- There was also a large increase in VFR spend per person – up from £207.84 in 2017 to £280.72 in 2019.
- The average spend for a Leisure overnight visitor was £412.04.

Average spend on Orkney Islands – by visitor type



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

Volume and value

Total value

- Average spend figures have been applied to visitor volume in order to calculate the total value of the different types of visits to Orkney in 2019.
- The total value of visitor spend on the Orkney Islands in 2019 was approximately £67 million. This represents an increase of 34% on spend since 2017 (£50m).
- The largest proportion of this spend came from Leisure visits - £47.8 million. This total spend for Leisure visits has increased from £37.4m in 2017.
- Spend figures for VFR and Business visits have also increased since 2017 – VFR spend was £5.4m and Business spend was £6.8m.

Total spend by visitors on Orkney Islands in 2019



	Number of visits	Average spend	Total Spend
Leisure	126,834	£376.61	£47,767,125
VFR	30,748	£280.72	£8,631,508
Business	34,591	£308.85	£10,683,497
Total	192,173		£67,082,129

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

Volume and value

Total value

- The spend figures for Leisure visits have been split by country of origin to calculate the total value of visitors coming from different locations.
- Visitors from the rest of the UK tend to have the highest average spend per person (£419.50), while those from Overseas tend to spend somewhat less (£350.72).
- Although Leisure visitors from overseas tended to spend less per person, their overall value to Orkney is higher (£18.4m) than those from Scotland (13.2m) or the rest of the UK (16.1m), due to the higher number of overseas leisure visits. It's important to note, however, that these figures do not include VFR or Business visitors who are predominantly from Scotland and the rest of the UK.

Total spend for Leisure visits to Orkney in 2019



	Number of visits	Average spend	Total Spend
Scotland	35,894	£368.40	£13,223,405
Rest of UK	38,431	419.50	£16,121,738
Overseas	52,509	350.72	£18,416,120
Total Leisure	126,834	376.61	£47,767,125

Base (All who provided spend data): Total Leisure 627;
Scotland 174; rest of UK 205; overseas 248

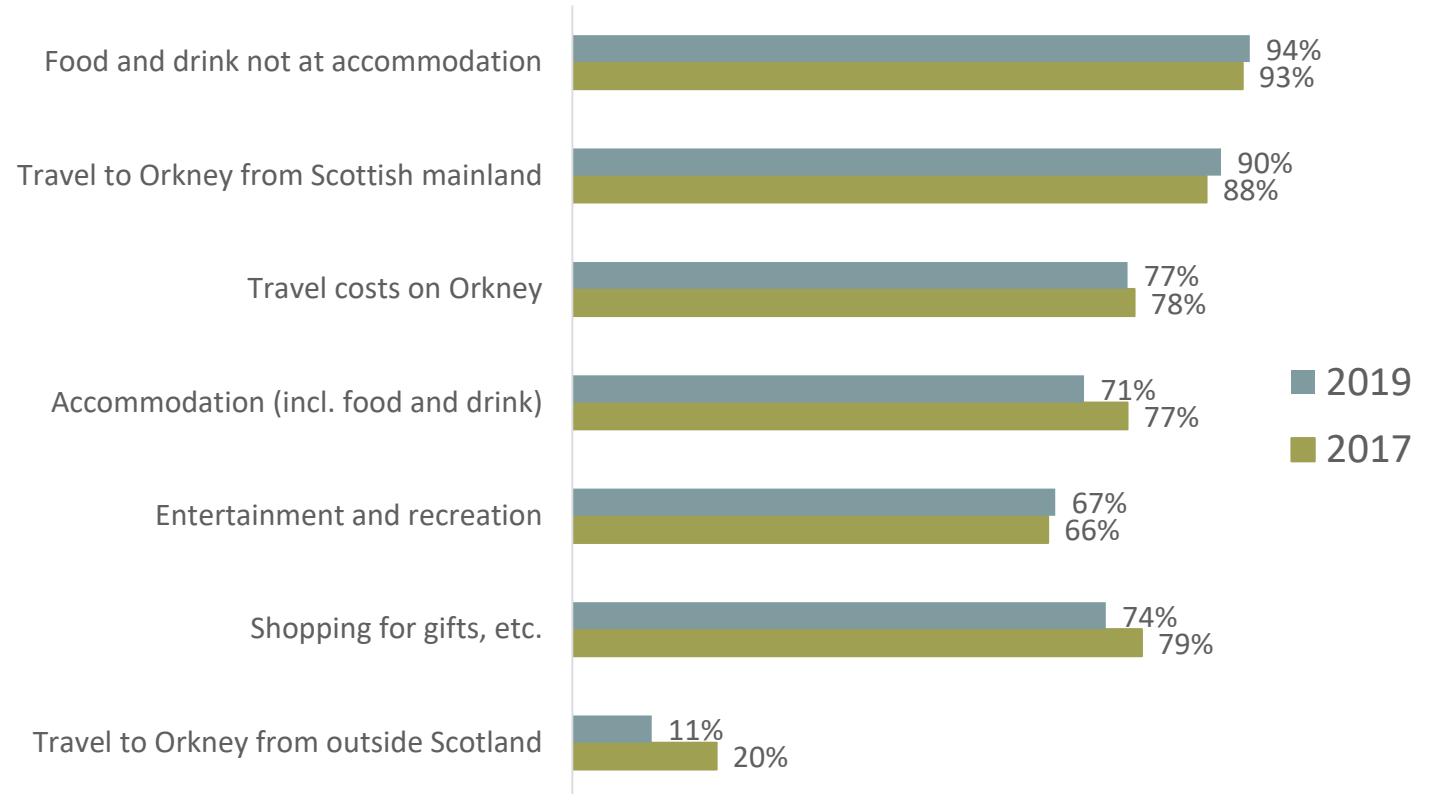
*Total spend figures by origin do not add exactly to total Leisure spend. This is due to rounding and weighting.

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. The proportions spending in these categories are consistent with 2017 data.
- Leisure visitors were more likely to incur accommodation costs (78%) than Business (64%) or VFR (47%) visitors.
- Leisure visitors were also more likely to mention spend on entertainment/recreation (81%) than Business (16%) or VFR (54%) visitors.

Proportions providing spend data in each category – all visitors



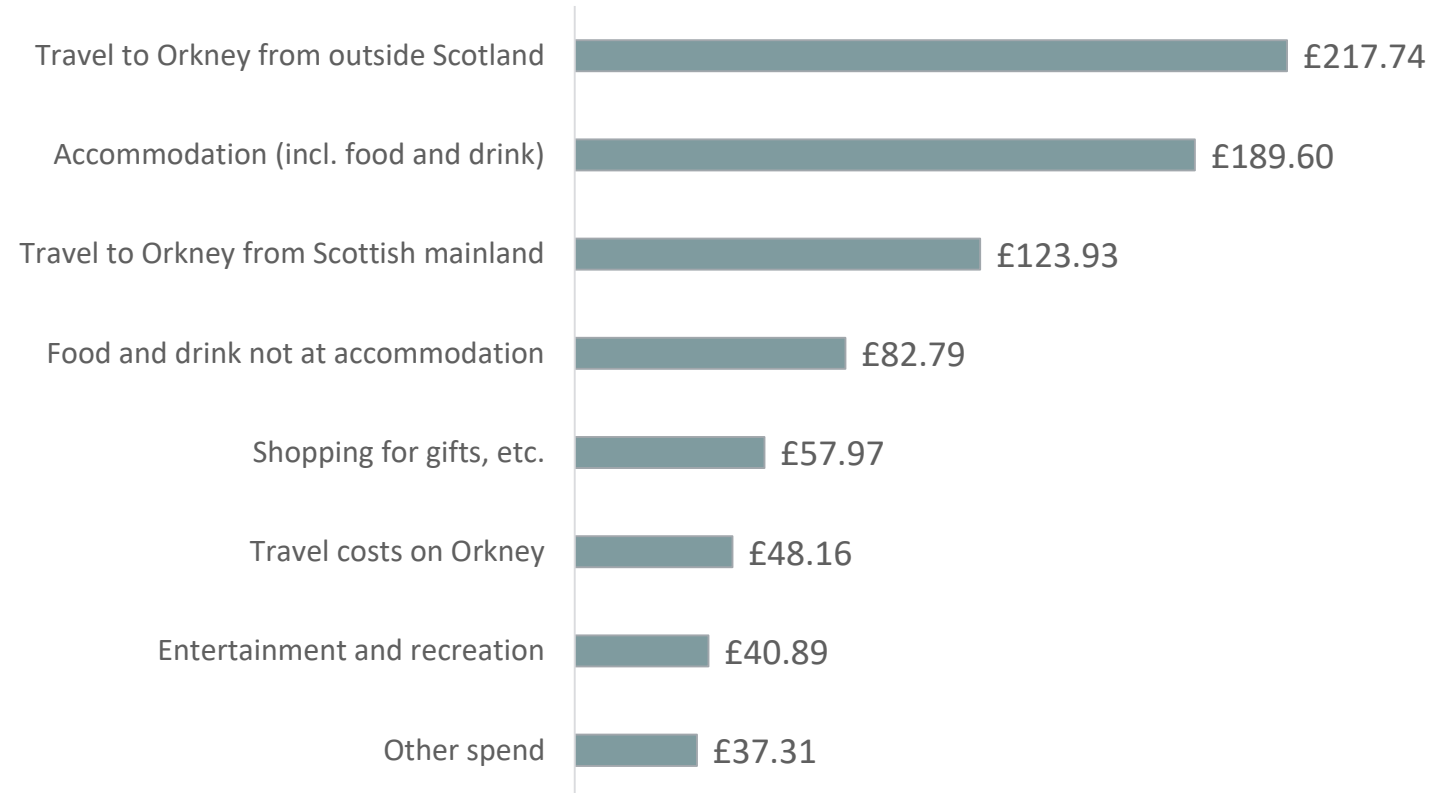
Base (All able to provide spend in each category): 2019: 828; 2017: 953

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 £217.74. Travel from the Scottish mainland costs around £124 per person on average.
- The average cost of accommodation for people staying in paid for accommodation was £190, whilst the additional costs of food and drink on the trip averaged £83 for those who incurred these costs.
- Of those who purchased gifts and souvenirs, the average amount spent on the trip was £58 per person.

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

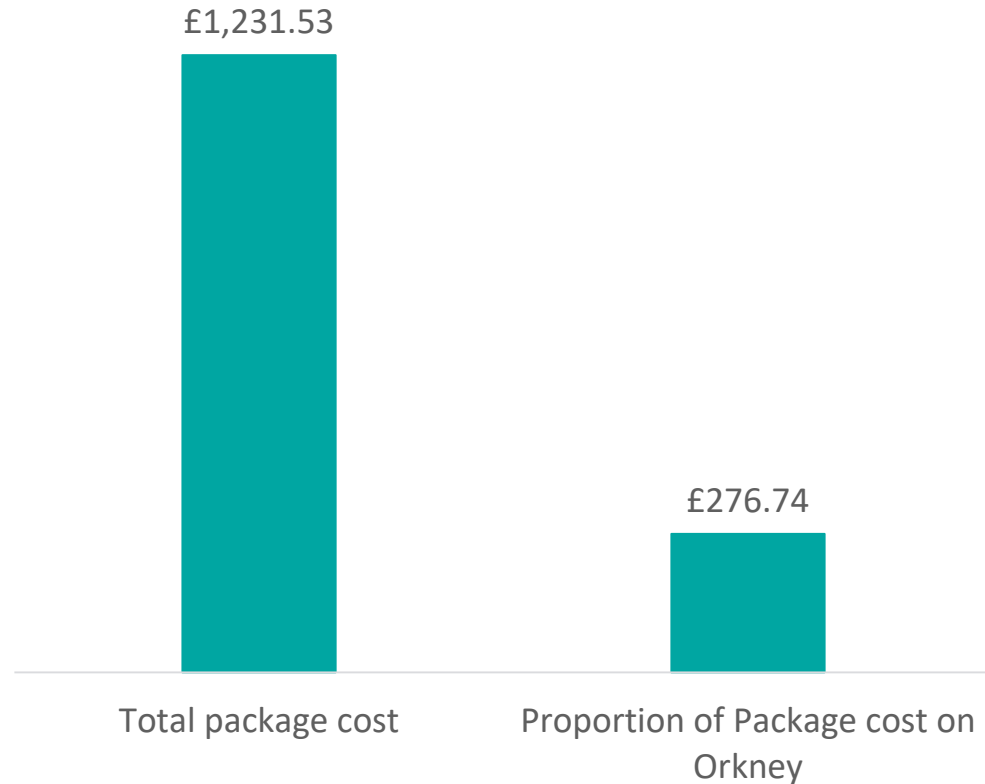


Base (All able to provide spend in each category): 88 - 765

Volume and value Visitors on a package

- 7% of Leisure visitors booked their trip as a package.
- Of those able to provide trip spend, 44% reported that their package included only time spent in Orkney, while 54% reported that it included nights elsewhere (2% were unsure).
- 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 2017, 2013, 2009 and 2005.

Average cost of a package trip - Leisure visitors



Base (All Leisure visitors on a package who were able to provide spend): 56





Final summary and conclusions

Summary and conclusions

Visitor profile



- The Orkney Islands have experienced a surge in visitor numbers in recent years and is now one of the most popular destinations in Scotland. It is vital that Orkney Islands Council and its partners manage tourism in a sustainable way, while ensuring that economic benefits accrue to the islands and their communities.
- A research tracking study has been established to ensure that Orkney Islands Council and its partners have relevant, accurate and up-to-date data to guide strategic planning. The 2019 study is the second wave of research, following a baseline study conducted in 2017.
- Two thirds (66%) of visitors to Orkney in 2019 were on a holiday/leisure trip, while 16% were business/work visitors and 16% had travelled to the islands to visit friends or relatives.
- The islands attract Leisure visitors from all over the world, although the largest proportion came from the UK (59%), with equal proportions from Scotland (28%) and England (28%). Over a fifth (22%) of all Leisure visitors were from Europe (mostly Germany and Holland), with 11% from North America and 8% from other overseas countries (mostly Australia and New Zealand). The geographical profile of Leisure visitors was very similar in 2019 to the previous wave of research in 2017.
- The gender profile of Leisure respondents was slightly skewed to males (54%), and the age profile tended to be older (77% over 45 years old).
- Half of Leisure visitors were travelling as a couple with their partner or spouse, while over a quarter were in a family group. Just less than one in ten had children under 16 years old in their party.
- The majority of Leisure visitors (71%) were first time visitors to Orkney.

Summary and conclusions

Visitor journey



- The factors that were most influential in drawing Leisure visitors to Orkney were unchanged since the previous survey in 2017 – most people come to Orkney to enjoy the scenery and landscape, and the history and culture.
- Inspiration came from a number of sources, with TV programmes and travel features in newspapers, magazines and guidebooks the most frequently mentioned. TV programmes cited by visitors included Britain’s Ancient Capital, Coast and Time Team.
- Planning the trip tends to start at least 3 months before travel, with visitors researching using online sources, talking with family and friends, and reading travel guidebooks. Overseas visitors were particularly likely to use guidebooks, whereas those from the UK were more likely to be guided by advice from friends and family.
- There was some evidence that in 2019 planning and booking was initiated longer before travel to Orkney than in 2017. There was also a significant decline in the proportion of visitors reporting that they did not book their accommodation in advance in 2019. These data may indicate a growing awareness of the need to book early as the popularity of Orkney as a visitor destination increases.
- The VisitOrkney and VisitScotland websites were particularly well used by Leisure visitors during the planning process. It is also significant that more than half of those who researched online looked at traveller reviews and ratings. Although social media continues to be a source of information for a minority of Leisure visitors overall (11%) the proportion using it has increased since 2017 (6%). It is also important to note that one in five of those aged under 55 reported using social media as an information source for their trip.
- For half of Leisure visitors their accommodation booking was directly with the provider, although one quarter did mention using an online travel or booking agency, and there has been an increase on bookings with online travel agencies since 2017. Most Leisure visitors booked their trip to Orkney independently, with only one in ten booking a package including travel and accommodation.

Summary and conclusions

Trip profile




- Almost nine in ten of all visitors stayed overnight on their trip to Orkney, with the majority of overnight visitors (85%) staying for a period of one week or less.
- Kirkwall, Stromness and elsewhere on the 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 taking short walks, visiting archaeological sites, visiting beaches/coasts and general touring and sightseeing. The top attractions visited were the Ring of Brodgar, Skail House/Skara Brae and St Magnus Cathedral.
- Across all visitors, hotels (26%) and self-catering (24%) were the most frequently mentioned types of accommodation. For Leisure visitors self-catering was slightly more popular (29%) although many did stay in hotels (22%) and B&Bs (23%). There has been an increase in the popularity of ‘homestay’ accommodation (such as Airbnb) in 2019 – mentioned by 10% of Leisure visitors compared to just 5% in 2017. The proportion citing their accommodation type as campervans has also increased from 5% in 2017 to 11% in 2019
- Online sources of information continue to be the primary way of accessing information for Leisure visitors during their trip, although many also mentioned visitor information centres, printed materials (such as local heritage information and brochures) and talking to locals. There has been a decline in the usage of visitor information centres since 2017 and an increase in online sources, local heritage information and social media.
- 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. This proportion is consistent with the 2017 wave of research.

Summary and conclusions

Evaluation of trip experience



- Orkney continues to attract very high satisfaction ratings from its visitors; similar to 2017, the vast majority provided a positive evaluation of their experience on the islands.
- Interactions with local people was one of the key elements that visitors to the islands enjoyed, with many agreeing that they were made to feel welcome 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, 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.
- The extent and quality of digital coverage (Wi-Fi, mobile phone signal, 3G/4G) remains an area of lower satisfaction, although the majority of visitors were happy with digital coverage. There have also been improvements in the ratings of the availability of free Wi-Fi, mobile phone coverage and the availability of 3G/4G since 2017.
- The main improvements suggested by visitors were better information generally, signposting around the islands, improvements to transport (availability, information and timetables) and more choice/availability of food and drink options.
- 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, when asked to rate their likelihood to return to Orkney for a holiday or short break in the next five years, the average score amongst Leisure visitors was 7.4 out of 10.
- Overall, when asked to provide a score out of 10 in terms of their overall satisfaction with their trip to Orkney, the average was 9.1, further demonstrating the very high levels of satisfaction that visitors had with their experience on the islands.



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.