Scotinform

# ORKNEY VISITOR SURVEY 2012/13

## RESEARCH RESULTS – FINAL REPORT

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**Prepared by Scotinform Ltd and Reference Economics**

INVESTOR IN PEOPLE

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**Market Research**
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## EXECUTIVE SUMMARY

### 1. Research Background

The 2012/13 Orkney visitor research was commissioned by Orkney Islands Council, Shetland Islands Council, Comhairle nan Eilean Siar, Highlands and Islands Enterprise and VisitScotland in order to provide data on the profile of visitors; assess views on their visit experience; and measure the economic impact of visits to each island.

The research was carried out using three methods:

**Face-to-face exit interviews:** 1,328 interviews were completed with visitors as they departed from Kirkwall Airport or on the ferries from Kirkwall, Stromness, St Margaret's Hope or Burwick. The interviews were completed between October 2012 and September 2013, with the number of interviews per month based on historical passenger data. The questionnaire gathered data on the visitors' demographics, the main activities undertaken on Orkney and the trip expenditure.

**Online survey:** the link to an online questionnaire was emailed to respondents who had provided email addresses in the exit interviews. This questionnaire allowed a wider range of topics to be addressed than in the face-to-face interviews, with visitors asked about the details of their trip and levels of satisfaction with different elements of their visit. A total of 821 responses were received from visitors to Orkney.

**Calibration survey:** this survey collected data on all passengers (both visitors and residents), and was used to calibrate the passenger data provided by transport operators so that accurate estimates of total visitor spend could be made. A total of 4,902 face-to-face calibration interviews were completed from October 2012 to September 2013, with departing passengers asked their normal place of residence and, if not resident on Orkney, their type of visit and group size.

The analysis of the data from the face-to-face exit interviews and online survey provides robust findings on visitors to Orkney which are compared with the findings from the surveys for the Outer Hebrides and Shetland and with two previous Orkney visitors surveys (carried out in 2004/2005 and 2008/2009).

The volume and value of tourism to Orkney was calculated using the data from the calibration survey, passenger data from the relevant transport providers and expenditure per trip data from the face-to-face visitor survey. The economic impact of visits has been compared with estimates from a previous survey in 2009.

### 2. Impact of Visitors

There were a total of approximately 142,000 visitors to Orkney during 2012-2013. Holiday visitors accounted for 65% of visitors, with business and those visiting friends and relatives (VFR) each accounting for just under 20%. The visitor volumes for Orkney should be treated with caution as passenger data was not available from one ferry operator and the Scrabster to Stromness ferry did not sail for a significant period in April-May. Three quarters of visitors used ferries to travel to Orkney: holiday visitors were the main users of ferries, with VFR also showing a preference for ferry and business visitors split evenly between ferry and air travel. 20% of trips to Orkney were day trips, with 93% of these trips by ferry.

The average spend per trip on Orkney was £218, the same as in 2009. Holiday visitor spend per trip had decreased to £217 compared with £250 in 2009. By comparison, business and VFR visitors' expenditure per trip has increased to £200 and £238 respectively. The results suggest that approximately 14% of visitor expenditure was on local products and produce.

The value of visitors to Orkney for 2012-2013 was over £31 million: this figure is around £4.9 million lower than the inflation adjusted 2009 figure due to a fall in holiday visitor expenditure which was only partially offset by the increase in expenditure by business and VFR visitors.

The contribution of Scottish visitors to the Orkney economy was over £9 million, whilst visitors from elsewhere in the UK contributed over £11 million and overseas visitors accounted for £10 million.

## 3. Types of Visitor

*3.1 Orkney*

Over half (57%) of all visitors to Orkney (both overnight and day trips) were on a holiday/short break, with a quarter on a business trip and 17% VFR. The type of visit differed significantly at different times of the year: business visitors accounted for around half of all visitors between October to December and two-thirds between January and March, whilst the proportion of holiday visitors was highest between April and September.

*3.2 Comparisons with other islands*

Comparing the results with the other islands shows that the proportion of types of visitors to Orkney and the Outer Hebrides is similar, whilst Shetland has a much higher proportion of business visitors (42%) than the other islands (Orkney 25%; Outer Hebrides 26%) and consequently a lower proportion of holiday and VFR visitors.

## 4. Visitor Profile

*4.1 Orkney*

Visitors were more likely to be male (55%) than female (45%). The relatively high proportion of males relates to the high percentage of visitors whose main purpose is business: 84% of business visitors were male.

Visitors to Orkney were likely to be aged over 45 years old, and there were a low proportion of visitors in the younger (under 24 year old) age groups. The age profile of different visitor types varied, however, with holiday and VFR visitors slightly more likely than average to be aged over 45 years old and business visitors most likely to be aged between 25-54 years old.

43% of visitors were Scottish residents, with VFR and business visitors more likely than average to be from Scotland. One third of visitors were from the rest of the UK/Ireland: this was the main area of residence for holiday visitors. In total, 25% of visitors were from Europe or elsewhere in the world, with over a third of holiday visitors from Europe/rest of world.

The social grade of visitors showed a high proportion in higher income brackets, with 62% of visitors classified as ABs, the top two social grades, and only 5% classified as DEs. Holiday visitors were more likely than average to be ABs, whilst business visitors were more likely than average to be in the C1C2 social grade, this being reflected by the fact that many worked in the oil and gas and construction industries.

Visitors were equally likely to be visiting on their own or with their partner/spouse (both 37%), with business visitors most likely to be travelling on their own.

*4.2 Comparisons with other islands*

Comparisons with the visitor profiles across the three islands showed that the gender profile of visitors to Orkney is similar to that for the Outer Hebrides, but that Shetland has a higher proportion of males, reflecting its percentage of business visitors. The age profile for the three islands was similar. Visitors to the Outer Hebrides included a higher than average proportion of Scottish residents, whilst Orkney had higher proportions of overseas visitors than the other islands. The Outer Hebrides and Orkney had similar socio-economic profiles, with around 61% of visitors in the AB social grade: this compares with Shetland where just less than half the visitors were in these social grades. Travelling alone or with a partner/spouse was the most common type of group on all three islands, though the balance between the two varied by island, with travelling alone most common on Shetland and with a partner/spouse most common on the Outer Hebrides.

**5. Profile of Visits**

*5.1 Orkney*

Two thirds (65%) of visitors were on holiday or VFR staying overnight and, amongst those staying overnight, half were on their main holiday. Approximately one in ten holiday/VFR visitors were on a day trip, with two thirds on an independent day trip and a fifth on a guided tour/package.

Although 49% of all visitors were on a first time visit to Orkney, the proportion was much higher amongst holiday visitors (63%) than VFR or business visitors (both around 30%).

The average length of stay on Orkney was 5.7 nights out of a total of 11 nights away from home during the trip. VFR visitors were spending longest on Orkney: 7.9 nights compared to 6.2 nights for business visitors and 4.7 nights for holiday visitors.

Half the visitors were travelling home after their trip to Orkney, with VFR and business visitors more likely than holiday visitors to be going straight home. 43% of visitors were travelling elsewhere in Scotland: with holiday visitors far more likely than business or VFR visitors to be visiting other areas in Scotland during their trip.

*5.2 Comparisons with other islands*

The proportion of first time visitors varied across the three islands, from 37% in the Outer Hebrides to 40% in Shetland and 49% in Orkney. On all three islands holiday visitors were more likely than other visitor types to be first time visitors: on Orkney and Shetland approximately 60% of holiday visitors were first time visitors, whereas in the Outer Hebrides the proportion was 53%.

**6. Planning the Visit**

*6.1 Orkney*

Nearly one in five holiday and VFR visitors had considered a visit to Shetland when planning their trip to Orkney and 13% said they had considered a trip to the Outer Hebrides.

The main influences on their decision to visit Orkney were an interest in the island's archaeology/history or the scenery/landscape. Other influences were having visited the island previously and having family connections with the area. For visitors from outside Scotland the main influence was the archaeology and scenery/landscape, but for Scottish visitors, previous visits were the main factor.

More than half of visitors had planned their trip at least three months in advance (mainly holiday visitors), with 28% saying they had planned it in the last month (mostly business visitors). The actual booking of the trip showed a similar pattern to planning, with the notable exception that nearly one in ten visitors did not book in advance.

Satisfaction with planning travel to Orkney was high: 63% of visitors said they were very satisfied with getting to Orkney and a further 31% said they were quite satisfied. Holiday and VFR visitors expressed particularly high levels of satisfaction (64% very satisfied). Visitors were more likely to be positive about the availability of convenient sea routes than about the availability of convenient air routes: 15% of those who rated air routes were not satisfied with availability and comments highlighted issues with costs of flights and the lack of direct flights to Orkney.

*6.2 Comparisons with other islands*

For the Outer Hebrides and Shetland the main influence for the visit was an interest in scenery/landscape, whereas in Orkney the main reason was an interest in archaeology/history (scenery/landscape was the second most important reason).

In all three islands, around a third of holiday and VFR visitors started to plan their trip 3-6 months in advance whilst business visitors were very unlikely to plan their trip more than a month in advance (70% of business visitors planned trip within four weeks of departure).

There were high levels of satisfaction with getting to the islands amongst visitors to all three islands. The results were also similar for satisfaction with availability of convenient air and sea routes: visitors had much higher levels of satisfaction with sea routes than with air routes: this particularly affected the satisfaction of business visitors who were more likely than average to travel by air.

**7. Sources of Information Pre-Visit**

*7.1 Orkney*

Internet/websites were the most common source of pre-visit information, mentioned by seven out of ten visitors. Visitors were also likely to get advice from friends/relatives, refer to brochures and look at guidebooks. There were some key differences by visit type:

- holiday visitors were much more likely than average to look for information online and had above average usage of brochures, guidebooks and Visitor Information Centres

- VFR relied heavily on advice from friends and relatives, but were also likely to refer to the internet

- business visitors were less likely than average to refer to any source, but if they did so it was likely to be the internet

The main information sought from the internet related to transport and accommodation. Other key topics were visitor attractions, history/culture, natural history and activities.

In terms of online booking, approximately 70% of those who had looked for information online had booked transport to Orkney and 60% had booked accommodation.

Satisfaction with the information available online was reasonably high: 53% of those who had accessed online information were very satisfied with what was available and 39% were quite satisfied. Ratings for offline information were lower, with 38% of those who had looked for offline information when planning their trip saying they were very satisfied and 42% saying they were quite satisfied. The reasons for dissatisfaction with offline information was a lack of local travel guides/books.

*7.2 Comparisons with other islands*

Sources of pre-visit information did not vary significantly across the three islands, with the key driver being the visit type rather than the location. The internet/websites were the most popular source of pre-visit information for holiday and business visitors, with VFR more likely to rely on advice from friends/relatives. Holiday visitors were likely to refer to a range of sources, including the brochures and guidebooks whilst other visitor types were much less likely than holiday visitors to look at anything other than the Internet.

**8. Source of Information during Visit**

*8.1 Orkney*

The main sources of information during visits were the Visitor Information Centres (37%), brochures (36%), using a smartphone/internet on a mobile phone (34%), local heritage information leaflets (34%) and asking local people (34%). Holiday visitors were much more likely than VFR or business visitors to source information during their visit: most notably approximately half had visited a Visitor Information Centre and the same proportion had referred to a brochure.

*8.2 Comparisons with other islands*

The key sources of information during their visit were the same for all three islands: as with pre-visit information the key differences were by visit type rather than island. Holiday visitors referred to the widest range of sources, with Visitor Information Centres the most important source in all three islands. The likelihood of using smartphone/internet mobile was the same across the three islands, but Orkney holiday visitors were more likely to refer to brochures (e.g. VisitScotland) or local heritage information leaflets.

**9. Communication**

*9.1 Orkney*

During their trip to Orkney, 38% of visitors had communicated about their visit on social media: the main activity was uploading photos or updating their status on Facebook. There was a clear difference in age-groups with younger respondents much more likely than older respondents to post pictures from their visit online and update their Facebook status whilst on their visit.

Satisfaction with mobile phone reception was reasonable: 69% of visitors were very or fairly satisfied with reception and only 17% were very or fairly dissatisfied. The highest levels of dissatisfaction were amongst business visitors and VFR. The main reason for dissatisfaction with mobile phone reception was the 'patchy' phone connection or the lack of connection.

Satisfaction with the availability of WiFi/broadband was similar to the satisfaction with mobile phone reception: 61% of visitors were satisfied and 15% were dissatisfied. Availability of broadband was a particular issue for business visitors who expressed dissatisfaction with the limited access to WiFi and slowness of connections. It should be noted that this is not just an island issue as availability of mobile phone reception and WiFi was also rated as a lower area of satisfaction in the most recent Scotland-wide VisitScotland visitor survey.

*9.2 Comparisons with other islands*

Approximately 40% of visitors on each island had used social media during their visit, with a third uploading photos and between a quarter to a third updating Facebook. On the Outer Hebrides and Shetland VFR visitors were more likely than average to use Facebook.

Satisfaction with mobile phone reception and WiFi was not very high in any of the islands, but it was lower in the Outer Hebrides than in Orkney or Shetland. Holiday respondents were generally more satisfied than other visitor types with mobile phone reception on Orkney and Shetland, whilst on the Outer Hebrides, the visitor types showed similar levels of satisfaction with communication.

## 10. Transport

*10.1 Orkney*

96% of visitors had used the same mode of transport for arrival and departure, with only 3% using different methods for arrival and departure.

Satisfaction with Kirkwall airport and Stromness ferry terminal was high: three quarters of visitors were very satisfied with the facilities and services. By contrast, only 47% of visitors using Hatston ferry terminal and 15% of those using St Margaret's Hope were very satisfied with the facilities and services. The key issues with these two terminals were facilities/services being closed for late night sailings at Kirkwall and the lack of facilities at St Margaret's Hope.

Car, whether privately owned or hired, was the main form of transport used during the visit, with walking the most likely form of other transport.

There were reasonably positive levels of satisfaction with the cost of travel to Orkney: two thirds of visitors were very or fairly satisfied with the cost. Business visitors expressed the lowest levels of satisfaction with a third saying they were very or fairly dissatisfied. Respondents compared the cost of both flights and ferries to Orkney unfavourably to costs they had experienced elsewhere. Satisfaction with the cost of travel <u>in</u> Orkney was slightly higher than satisfaction with the cost of travel <u>to</u> Orkney, with VFR more likely than holiday or business visitors to be dissatisfied with the cost of travel within Orkney. The main reasons for dissatisfaction with travel in Orkney related to the costs of inter-island ferries, petrol, hire car and buses.

Visitors were reasonably satisfied with the value for money and availability of public transport, with approximately a third saying they were very satisfied with both these aspects of travel. Comments suggested limited bus services to visitor attractions, infrequent services and the costs of inter-island ferries were the key issues with public transport.

*10.2 Comparisons with other islands*

The main forms of transport were fairly consistent across the three islands. Car was the most popular form of transport, with visitors to the Outer Hebrides more likely than those to Shetland and Orkney to use a car during their visit. Hiring a car was more common for holiday visitors in Shetland than in Orkney or the Outer Hebrides and the use of regular bus services was much lower on the Outer Hebrides than on the other two islands. Comments from respondents on the Outer Hebrides suggest that availability of public transport, especially in the evenings, are an issue for visitors.

In all three areas, the highest level of satisfaction with travel was for the quality of public transport, although levels of satisfaction with this aspect were highest in Orkney and lowest in Shetland. There were also relatively high levels of satisfaction with the value for money of public transport in all three areas, but visitors to the Outer Hebrides were less satisfied than other islands with the availability and cost of public transport: this may explain their below average usage. Satisfaction with the cost of travel to the islands was highest amongst visitors to Shetland and lowest for the Outer Hebrides, with holiday visitors most satisfied with the cost in all three islands.

## 11. Accommodation

*11.1 Orkney*

Hotels, mainly 3 star, were the most popular type of accommodation with around a third of visitors staying in hotels during their stay. The next most popular accommodation types were self-catering, guest house/B&B and staying with friends/family. The use of accommodation varied significantly by type of visitors:

- just over a quarter of holiday visitors stayed in a hotel and a quarter used self-catering accommodation. One in five stayed in guest house/B&B and one in ten stayed in a hostel.
- the main type of accommodation for VFR visitors was, not surprisingly, staying with friends and relatives: just over half of VFR used this type of accommodation. The other main type used by VFR visitors were self-catering or hotels, with 16%-17% staying in each of these types of accommodation.
- business visitors were most likely to stay in hotels, with 52% staying in 3 star hotels. 15% stayed in workers' accommodation on-site (e.g. rigs) and 15% stayed in guest houses/B&Bs.

The most likely method of booking accommodation was through direct contact with the provider via website or phone.

Over 90% of visitors staying overnight in paid for accommodation said the type and quality of accommodation they wanted was available when they booked. Satisfaction with the actual quality and value for money of staying in accommodation was very high amongst holiday and VFR visitors, but business visitors were less likely to be satisfied. The quality of service provided was rated very positively, although again business visitors were less satisfied than other visitor types. Comments on the reasons for dissatisfaction focussed on issues specific to the hotel or bed and breakfast respondents stayed in, including noise, dirty rooms and no hot water.

*11.2 Comparisons with other islands*

Hotels were the most popular type of accommodation for holiday and business visitors across all three islands, used by approximately 30% of visitors. Usage of guest houses/B&Bs was also similar amongst holiday visitors, with those visiting the Outer Hebrides more likely than other visitors to use this type of accommodation. Between a fifth and a quarter of visitors used self-catering accommodation and one in ten holiday visitors on Shetland and Orkney used hostels (5% on the Outer Hebrides). The most noticeable difference was the high use of workers' accommodation on Orkney (15%) and Shetland (20%), compared with the Outer Hebrides (2%).

Satisfaction with accommodation showed a similar pattern for the three islands: there were generally high levels of satisfaction with service, quality and value for money, but business visitors were much less satisfied than other visitor types with all aspects of their accommodation. Business visitors to Shetland had notably lower levels of satisfaction with accommodation than on the other islands.

## 12. Activities during Visit

*12.1 Orkney*

Overall, Stenness - Ring of Brodgar (70%) was the attraction most likely to be visited by visitors, with Skara Brae (68%), Stenness - Standing Stones (67%) and St Magnus Cathedral (67%) all visited by more than two-thirds of visitors.

Pre-visit awareness of Orkney visitor attractions was generally much higher than actual visit rates, with the notable exception of St Magnus Cathedral, Skara Brae, Stenness - Ring of Brodgar, and Stenness - Standing Stones. Comparison of pre-visit awareness and visit rates highlighted a proportion of visitors who only became aware of these attractions *during* their visit to Orkney.

Holiday visitors were more likely to go and see visitor attractions: business visitors were unlikely to visit attractions except for St Magnus Cathedral, which 45% of business visitors had been to during their trip.

The most likely activities for visitors were visiting beaches/coastal scenery, visiting archaeological sites, walks (both long and short), trying local food, shopping for local craft/produce and general sightseeing. As with visitor attractions, holiday visitors were more likely than other visitor types to undertake activities during their visit.

*12.2 Comparisons with other islands*

Beaches/coastal scenery was the key activity for visitors to all three islands, and was particularly important for visitors to the Outer Hebrides. In Orkney visitors were as likely to visit archaeological sites as visit beaches/coasts and in Shetland visitors were as likely to go on a short walk. Trying local food was important in all three areas, with visitors more likely to have done this in Orkney and the Outer Hebrides than in Shetland, where shopping for local crafts/products was more popular.

## 13. Satisfaction with Visit

*13.1 Orkney*

Visitors' overall satisfaction with their visit was very high: 87% were very satisfied and a further 12% were fairly satisfied, giving a total 99% of visitors stating that they were very or fairly satisfied. Business visitors, however, expressed lower than average satisfaction with their visit (76% very satisfied): this reflects the lower levels of satisfaction with the quality and value for money of accommodation. The main reasons for dissatisfaction were the limited availability of cafes/restaurants, the poor quality of accommodation, frequency and timing of buses and poor signage/information.

For over two-fifths of visitors their trip to Orkney had exceeded their expectations, whilst over half felt their expectations had been met. Business visitors were more likely than average to feel that the visit had not met their expectations, confirming their slightly lower than average levels of satisfaction with the overall visit.

Highlights of visits to Orkney focussed on the archaeological and historical sites, friendliness of local people/customer service and scenery/landscape.

Comments from visitors on areas for improvement highlighted travel costs as a key issue for all visitors, with holiday visitors also suggesting improvements to access to visitor information and business visitors commenting on the need to improve phone and internet connections.

*13.2 Comparisons with other islands*
Overall visit satisfaction was very high for all three islands: on each island, 90% or more of holiday and VFR visitors were very satisfied with their visit. Business visitors expressed lower levels of satisfaction, with between 76% (Orkney) and 64% (Shetland) of business visitors saying they were very satisfied.

**14. Comparisons with Previous Visitor Surveys**
Compared with previous visitors surveys (2004/2005 and 2008/2009), visitors are more likely to be:

- male (possibly due an increase in business visitors)
- from overseas (and less likely to be Scottish residents)
- from the C1C2 socio economic group (29% in 2013 compared to 24% in 2009 and 2005)

Underlying these demographic changes is a decline in the proportion of holiday visitors and an increase in the proportion of business visitors. This has led to the changes in the visitor profile and an increase in visitors travelling on their own.

The proportion of first time visitors has declined compared with previous surveys (from 54% to 49%), with holiday visitors now less likely to be first time visitors.

The average length of trip has increased, with the number of nights spent on Orkney increasing from 4.4 nights in 2009 to 5.7 nights in 2013. The change in length of trip related to VFR and business visitors increasing their length of trip: holiday visit-length remains the same as in previous surveys.

Kirkwall remains the most popular area for visitors, followed by Stromness and West Mainland and visitors use of cars during their visit has increased compared with 2009, along with increases in the use of ferries and coach tours. Regular bus trips have decreased.

The likelihood of staying in hotels has increased from 23% in 2009 to 32% in 2013, mainly due to an increase in business usage. VFR visitors were more likely than in previous surveys to stay in hotels and less likely to stay with their friends and relatives.

The visit to Orkney exceeded the expectations of 44% of visitors in 2013, a significant increase on previous surveys when a third of respondents said it had exceeded expectations. Holiday respondents were much more likely than in previous years to think that their expectations had been exceeded (50% in 2013 compared to 31% in 2009).

# 1. INTRODUCTION AND OBJECTIVES

## 1.1 Introduction

This research, which took place between October 2012 and September 2013, was commissioned by a partnership of Orkney Islands Council, Comhairle nan Eilean Siar, Shetland Islands Council, Highlands and Islands Enterprise and VisitScotland. The partners identified a common need to understand the profile and experiences of visitors to Orkney, the Outer Hebrides and Shetland. The research builds on previous studies undertaken in each of these island groups and focused on the profile of visitors (both overnight and day visitors), visitor views on their experience and levels of expenditure. The research results will inform on-going tourism policies at a local and national level. This report presents findings from research conducted on Orkney.

## 1.2 Research Objectives

Specific objectives included:

- provide data on the profile of visitors
- identify the key drivers in decisions to visit
- understand visitor behaviour during visits
- assess visitors' satisfaction with their experience
- identify areas for development/improvement in products and services
- identify areas of commonality and differences with the other islands
- assess the likelihood of returning and/or recommending a visit
- provide data required for the assessment of the volume and economic value of visitors

## 2. METHODOLOGY AND SAMPLE

The project involved three separate surveys:

1. A face-to-face exit survey of visitors to Orkney
2. A post-visit online survey emailed to respondents
3. A face-to-face calibration survey of visitors to inform volume and value estimates

Each of these methodologies is explained below.

### 2.1 Face-to-Face Exit Survey

*2.1.1 Methodology for face-to-face survey*

The face-to-face exit survey involved interviews with 1,328 respondents (defined as non-residents or not in transit)[1]. The interviews were spread across a twelve month period (October 2012 – September 2013) according to an interview schedule based on historical passenger data. Table 2.1 displays the number of interviews conducted during each month of the research.

**Table 2.1: Number of face-to-face interviews per month**

| Month | No. of interviews |
|---|---|
| October 2012 | 52 |
| November | 24 |
| December | 16 |
| January | 10 |
| February | 27 |
| March | 85 |
| April | 94 |
| May | 123 |
| June | 205 |
| July | 274 |
| August | 290 |
| September 2013 | 128 |
| **TOTAL** | **1,328** |

Table 2.2 highlights that interviews took place on a range of days.

**Table 2.2: Days of week for face-to-face interviews**

| Day | No. of interviews |
|---|---|
| Monday | 150 |
| Tuesday | 165 |
| Wednesday | 208 |
| Thursday | 218 |
| Friday | 232 |
| Saturday | 283 |
| Sunday | 72 |
| **TOTAL** | **1,328** |

The interviews were conducted when visitors were exiting Orkney at the following locations:

[1] The research also excluded people who spent the majority of their visit on a yacht.

**Table 2.3: Locations and number of face-to-face interviews**

| Location | No. of interviews |
|---|---|
| Kirkwall airport | 370 |
| St Margaret's Hope ferry | 363 |
| Stromness ferry | 299 |
| Hatston ferry terminal | 167 |
| Burwick ferry (at Kirkwall Travel Centre) | 129 |
| **TOTAL** | **1,328** |

A similar number of interviews were conducted on the Outer Hebrides (1,262) and Shetland (1,259) ensuring comparability of results.

The face-to-face exit survey questionnaire (see appendix one) concentrated on collecting key demographic details from respondents as well as gathering information on what respondents had done during their visit and how much they had spent. The questionnaire focussed on these areas as this information is best collected at the time of visit when respondent recall is more accurate.

Scotinform trained local residents to complete the face-to-face interviews. This training ensured all interviews were completed in accordance with the Market Research Society Code of Conduct. Interviews were conducted on a random 'next person to pass' basis with the birthday rule[2] used to select an individual from a group of visitors.

*2.1.2 Profile of face-to-face respondents*

Table 2.4 shows that, overall, almost two-thirds of respondents were male and a third female. In terms of age, two-thirds of respondents were over the age of 45 years.

**Table 2.4: Profile of face-to-face respondents**
**Base: all respondents (1,328)**

| | Number | % |
|---|---|---|
| **Gender** | | |
| Female | 453 | 34 |
| Male | 869 | 65 |
| | | |
| **Age** | | |
| 16-24 | 65 | 5 |
| 25-34 | 169 | 13 |
| 35-44 | 218 | 16 |
| 45-54 | 286 | 22 |
| 55-64 | 304 | 23 |
| 65+ | 283 | 21 |

[2] The birthday rule helps select an individual from a group whose birthday is next or most recent.

## 2.2 Post Visit Online Survey

*2.2.1 Methodology for online survey*

An online survey of Orkney visitors generated 821 responses between October 2012 and September 2013. The online survey (see appendix two) asked respondents about the activities and places they had been to during their visit and their satisfaction with a range of elements of their visit. These topics were appropriate for the online survey as the timing (post visit) allowed respondents to reflect on their visit when rating it.

Respondents who took part in the face-to-face and calibration surveys were asked if they would be prepared to volunteer their email address to receive the online survey. A link to the survey was emailed to volunteers on a month-by-month basis and a prize draw for an iPad was offered to encourage a maximum response. The 821 responses represented a 38% response rate which far exceeded the initial aim of 300, ensuring a robust sample for analysis.

On the Outer Hebrides, the online survey generated 888 responses whilst on Shetland 368 responses were gained.

**Table 2.5: Number of online survey responses per month**

| **Month** | **No. of interviews** |
|---|---|
| October 2012 | 9 |
| November | 4 |
| December | 6 |
| January | 12 |
| February | 32 |
| March | 25 |
| April | 44 |
| May | 80 |
| June | 115 |
| July | 197 |
| August | 216 |
| September 2013 | 81 |
| **TOTAL** | **821** |

*2.2.2 Profile of online respondents*
Respondents to the online survey were slightly more likely to be male than female. The age profile is similar to that seen in the face-to-face survey with over seven-tenths of respondents aged 45 years+.

**Table 2.6: Profile of online respondents**
**Base: all respondents (821)**

| | Number | % |
|---|---|---|
| **Gender** | | |
| Female | 381 | 46 |
| Male | 437 | 53 |
| | | |
| **Age** | | |
| 16-24 | 22 | 3 |
| 25-34 | 76 | 9 |
| 35-44 | 140 | 17 |
| 45-54 | 195 | 24 |
| 55-64 | 227 | 28 |
| 65+ | 152 | 19 |

**2.3 Face-to-Face Calibration Survey**
The calibration survey obtained 4,902 responses and was conducted between October 2012 and September 2013, with interview shifts scheduled with reference to historical passenger data. Trained local interviewers conducted this survey at the same exit points highlighted in table 2.3, though face-to-face and calibration interviews were not conducted at the same time.

**Table 2.7: Number of calibration interviews per month**

| Month | No. of interviews |
|---|---|
| October 2012 | 346 |
| November | 275 |
| December | 217 |
| January | 236 |
| February | 368 |
| March | 204 |
| April | 243 |
| May | 196 |
| June | 539 |
| July | 834 |
| August | 1023 |
| September 2013 | 421 |
| **TOTAL** | **4,902** |

This questionnaire (see appendix three) was designed to collect information that allowed estimates to be made on the total volume of visitors to Orkney during the research period. In order to do this, all passengers (both visitors and residents) were included in the survey. This short survey gained information from respondents on three key areas: group size, normal area of residence, and type of visit e.g. on holiday, business or visiting friends and relatives (VFR).

The data gathered in the calibration survey has been combined with passenger volumes supplied by local transport operators to calculate visitor numbers and trip purposes (Holiday, Business and VFR). This data has been used to estimate the value of visits with figures on total expenditure, expenditure by visit type and average spend per visit.

On the Outer Hebrides the calibration survey gained 5,467 responses whilst on Shetland 5,712 people took part.

### 2.4 Analysis and Reporting

The face-to-face visitor survey gathered key data from respondents such as demographic profile, factors in the decision to visit, transport and accommodation choices, expenditure levels and overall satisfaction. The online survey focussed on visitors' experience, following up issues not covered in depth in the face-to-face survey, such as satisfaction with key aspects of the visit e.g. accommodation and transport. The calibration survey provided data on respondent group size, purpose of visit and residence which has been used to calculate overall volume and value.

Completed face-to-face interviews and responses to an online survey were input to Snap survey software package for analysis and reporting purposes. Snap is a powerful questionnaire design and analysis package which enables results to be created in tabular and chart format with cross-tabulations applied so that results can be fully analysed.

Results are displayed in tables and charts with commentary text to explain the main findings. Where sample sizes allow, and results are noteworthy, comparisons by research period (divided into quarters) and type of visit are highlighted. The report also contains some comparisons with results from Shetland and the Outer Hebrides at the level of visit type e.g. holiday, business or visiting friends/relatives. The appendices of the report contain copies of the survey questionnaires.

The report presents results from two surveys – face-to-face and online – under relevant headings. Tables and charts are labelled according to which survey the results are taken from e.g. there are results on transport from both surveys and these are all found in section 9 on transport. To aid identification all online tables and charts have had the word online colour highlighted. When mean scores are presented these are based on a 1 to 5 rating scale were 1 is the lowest rating and 5 is the highest.

Where an * appears this indicates a result of less than 1%. When responses add up to more than 100% this is a consequence of rounding, or because it was possible for respondents to give more than one answer to a question. Occasionally, some results will not add up to 100% and this may be due to a number of no replies to a specific question.

*2.4.1 Comparison with previous visitor surveys*

Where relevant, the report provides a comparison of the results for the 2012/2013 survey with two previous visitor surveys conducted on Orkney.

The two surveys used for comparisons are:

1. 2008/2009 Orkney Visitor Survey (AB Associates March 2010)
2. 2004/2005 Survey of Visitors to Orkney (TNS Travel and Tourism)

The data for the comparisons has been taken from the report on the 2008/2009 survey which included the 2004/2005 data. We have assumed that the findings from previous surveys are based on all respondents as the number of respondents is not shown in the tables.

All three surveys included face-to-face exit interviews with visitors at the airport and ferry terminals. The main difference between the 2012/2013 survey and the previous survey was that yacht visitors were excluded: this exclusion was based on the difficulties in surveying yacht visitors in the previous surveys[3].

The number of face-to-face interviews achieved in the three surveys were similar (see table 2.8) and provide robust data for the comparisons.

**Table 2.8: Numbers of face-to-face interviews**

| Survey | No. of interviews | No. of visitors represented |
|---|---|---|
| 2004/2005* | 1273 | 2800 |
| 2008/2009 | 1149 | 2748 |
| 2012/2013 | 1328 | 2782 |

*The 2004/2005 total was made up of 1,026 face-to-face interviews and 247 self-completion questionnaires

The breakdown of the interviews by the interview locations (Table 2.9) shows that the results for the 2008/2009 survey were similar to the most recent survey (note: the 2008/2009 report groups the locations by operator and there is no breakdown by location for 2004/2005 survey).

**Table 2.9: Number of interviews completed by location**

| | 2013 | 2009 |
|---|---|---|
| **Location** | No of interviews | No of interviews |
| Kirkwall airport | 370 | 281 |
| Kirkwall/Stromness ferries | 662 | 530 |
| St Margaret's Hope and Burwick ferries | 296 | 338 |
| **TOTAL** | **1328** | **1149** |

**2.5 Acknowledgements**
The successful completion of this project required the help and assistance of a number of organisations and individuals who we would like to thank:

Transport organisations for the supply of passenger data and permission to interview at their locations:

- Caledonian MacBrayne
- HIAL
- Lerwick Port Authority
- Loganair/Flybe
- Northlink/Serco
- Pentland Ferries

[3] 2008/2009 survey included eight interviews with yacht visitors

Staff at all the participating airports and ferry terminals who accommodated our interviewers and in some cases provided them with training and safety advice.

The client group for their on-going assistance and advice, before and during the research year:

- Orkney Islands Council
- Comhairle nan Eilean Siar
- Shetland Islands Council
- Highlands and Islands Enterprise
- VisitScotland

Our team of face-to-face interviewers based on Orkney, Shetland and the Outer Hebrides without whom the surveys could not have been completed.

## 3. VOLUME AND VALUE ESTIMATES

### 3.1 Volume Estimates

*3.1.1 Approach*

Calibration surveys were undertaken at Kirkwall airport and all the ferry terminals. The surveys collected information on whether passengers were visitors or residents of Orkney; party size; and, for visitors, what had been the purpose of their visit to the islands. At the airport only passengers using relevant scheduled air services were included in the visitor interviews and calibration surveys. The calibration data was then factored into the passenger carrying data provided by the transport providers to give numbers of visitors using the air and ferry services, and broken down by trip purpose.

Data was obtained from the transport providers on a confidential basis. There are, therefore, limitations to the analysis that is shown in this section.

Comparisons are made where relevant to the results of the previous Orkney Visitor Survey (2009).

There were a number of challenges in estimating visitor volumes:

- It was not possible to obtain passenger numbers from some of the ferry operators.
- There were no sailings on the Scrabster to Stromness ferry route in late April and most of May 2013 due to the mechanical breakdown of the vessel.

A best estimate has been produced of the total visitor numbers using the ferry services in 2012-2013. It is based on all the available data, plus the consultant's previous experience of research into Orkney's ferry services.

**Please note that some of the Tables' column and row data do not sum exactly to the totals shown due to rounding.**

*3.1.2 Visitor numbers*

Table 3.1 shows the estimate of visitor numbers for the 12 month period covered by the survey. The total was over 142,000 visitors, with most (slightly more than three quarters) travelling to/from Orkney by ferry.

**Table 3.1: Visitor numbers by transport mode (Oct 2012 – Sep 2013)**

| Mode | No. of visitors | Share % |
|---|---|---|
| Ferry | 108,914 | 76 |
| Air | 33,902 | 24 |
| **Total** | **142,816** | **100** |

Table 3.2 compares the estimated numbers of visitors using the ferry services in 2013 with those in 2009. The number of visitors who used a ferry service to travel to/from Orkney was very slightly higher in 2013. There were, however, significant differences between the different visitor types with a decline of around 2,000 in the number of holiday visitors offset by an increase in the numbers of business and VFR visitors.

**Table 3.2: Trip purpose: Ferry visitors: 2013 and 2009**

| Year/Purpose | Holiday | Business | VFR | Total |
|---|---|---|---|---|
| 2013 | 80,536 | 13,512 | 14,866 | **108,914** |
| 2009 | 82,769 | 11,727 | 14,132 | **108,628** |
| **Difference** | **-2,233** | **+1,785** | **+734** | **+286** |

Table 3.3 provides the same analysis for visitors who travel by air. There was an increase of over 1,300 in the number of visitors flying to/from Orkney: this was largely due to an increase in business traffic, with holidaymaker numbers changing little. In contrast to the ferry services results, VFR visitors were lower than in 2009.

**Table 3.3: Trip purpose: Air visitors: 2013 and 2009**

| Year/Purpose | Holiday | Business | VFR | Total |
|---|---|---|---|---|
| 2013 | 11,732 | 12,599 | 9,572 | **33,902** |
| 2009 | 11,507 | 10,228 | 10,810 | **32,545** |
| **Difference** | **+225** | **+2,371** | **-1,238** | **+1,357** |

*3.1.3 Trip purpose*

Table 3.4 breaks down 2013 visitor numbers by trip purpose. Within this and subsequent analysis, those who were on a combined business and holiday have been classified as "Business" visitors.

A majority of visitors (65%) were on holiday with the rest split quite evenly between business and VFR visitors.

**Table 3.4: Visitor numbers by trip purpose**

| Purpose | No. of visitors | Share % |
|---|---|---|
| Holiday | 92,268 | 65 |
| Business | 26,111 | 18 |
| VFR | 24,437 | 17 |
| **Total** | **142,816** | **100** |

Table 3.5 compares 2013 trip purpose data with that from 2009. Total visitor numbers are slightly higher (by around 1,600) than those in 2009. However, within this there has been a significant increase in business visitors, accompanied by slight reductions in the number who are on holiday or VFR.

**Table 3.5: Visitor numbers by trip purpose: 2013 and 2009**

| Purpose | 2013 | 2009 | Difference |
|---|---|---|---|
| Holiday | 92,268 | 94,276 | -2,008 |
| Business | 26,111 | 21,955 | +4,156 |
| VFR | 24,437 | 24,941 | -504 |
| **Total** | **142,816** | **141,172** | **+1,644** |

Table 3.6 breaks down visitor numbers by transport mode. Nearly three quarters of visitors using the ferry service were on holiday, with the rest split broadly evenly between VFR and business. In contrast, most of those using air services were business travellers.

Table 3.6 also shows that:

- Holidaymakers mainly travel by ferry.
- Three in five (61%) of VFR visitors use the ferry services.
- Business visitors are split quite evenly between air and ferry services.

**Table 3.6: Visitor numbers by transport mode**

| Mode | Holiday | Business | VFR | Total |
|---|---|---|---|---|
| Ferry | 80,536 | 13,512 | 14,866 | **108,914** |
| Air | 11,732 | 12,599 | 9,572 | **33,902** |
| **Total** | **92,268** | **26,111** | **24,437** | **142,816** |

It is estimated that a total of 28,735 day trips were made to Orkney: this represents 20% of all visitor trips. Of the day trips 26,783 were by ferry (93%) and 1,952 were by air (7%). Over 80% of day trips (24,108) were made for holiday purposes, with most of the rest (3,488) visiting Orkney on business.

### 3.2 Value Estimates

*3.2.1 Approach*

Expenditure per trip data and other visitor characteristics (e.g. party size) were extracted from the visitor interviews for air and ferry service users and by trip purpose. The data was then applied to the number of visitors in each trip purpose that had been generated through the calibration surveys.

The results shown in this section are weighted by the number of visitors in each trip purpose, including average party size, and they relate only to those who provided expenditure data to the interviewer. Some of the data shown e.g. for length of stay will differ from those shown in later sections because the analysis of the visitor surveys' data was based on unweighted responses.

Comparisons have been made with the results of the 2009 visitor survey. Unless otherwise stated the 2009 survey's expenditure figures have not been uprated to account for price inflation between 2009 and 2012-2013.

*3.2.2 Average expenditure per person per trip*

Table 3.7 shows total average spend for **all visitors** to Orkney and breaks this down by individual category of expenditure.

The total average spend across all categories was £432: within this the highest amounts were spent on travel to/from Orkney and visitor accommodation while on the islands.

It is estimated that £218 of the total spend was made in Orkney. This has been calculated by deducting the figure (£184) for travel to/from Orkney and then, in line with the 2009 Orkney Visitor Survey report, assuming that half (in this case £31) of the total price of a package/inclusive holiday which some visitors bought as part of their visit to Orkney would accrue to island businesses.

**Table 3.7: Average expenditure per person per trip (£)**

| Category | Expenditure |
|---|---|
| Travel to/from mainland/departure point | 184 |
| Price of package/inclusive holiday | 62 |
| Travel costs on the islands | 23 |
| Accommodation (including any food and drink at premises) | 80 |
| Food and drink bought elsewhere | 49 |
| Entertainment and Recreation | 12 |
| Shopping for gifts, souvenirs, crafts, etc. | 19 |
| Other Shopping | 2 |
| Miscellaneous Spend | 1 |
| | |
| **Total spend both on and off Orkney** | **432** |
| | |
| **Total spend on Orkney** | **218** |

Table 3.8 compares the 2013 profile against that from the 2009 survey report. Total expenditure was significantly higher (by £100) in 2013. The main reason for this was an increase (£80) in the costs of travel to/from Orkney, although there was also a marked increase in spend on package/inclusive holidays.

Total 2013 spend per trip on Orkney was the same as in 2009. Increased spend on package/inclusive holidays, with some increase in food and drink spend outside the visitors' accommodation were offset by the reduction in spend on shopping and miscellaneous items.

**Table 3.8 Average expenditure per person per trip (£): 2013 and 2009**

| Category | 2013 | 2009 | Difference |
|---|---|---|---|
| Travel to/from mainland/departure point | 184 | 104 | +80 |
| Price of package/inclusive holiday | 62 | 21 | +41 |
| Travel costs on the islands | 23 | 21 | +2 |
| Accommodation (including any food and drink) | 80 | 82 | -2 |
| Food and drink bought elsewhere | 49 | 42 | +7 |
| Entertainment and Recreation | 12 | 16 | -4 |
| Shopping for gifts, souvenirs, crafts, etc. | 19 | 33 | -14 |
| Other Shopping | 2 | 15* | -12 |
| Miscellaneous Spend | 1 | | |
| | | | |
| **Total spend both on and off Orkney** | **432** | **332** | **+100** |
| | | | |
| **Total spend on Orkney** | **218** | **218**** | **0** |

*The option in 2009 was other shopping/misc

**Note: Data shown elsewhere in the 2009 report implies a higher average spend per trip (£224)

Table 3.9 shows total spend (£442) was highest for holiday visitors, followed by those on business (£421) and then VFR visitors (£408).

While these spend levels were quite similar there were significant differences in their composition. Business visitors' travel costs to Orkney were significantly higher than holiday and VFR visitors' costs: at £221, they represent more than half of total business trip costs.

No business visitors spent money on a package/inclusive deal for their visit to Orkney. Holidaymakers spent an average of £90 on this item, with some VFR travellers also purchasing a deal (at an overall average of £25).

VFR had the highest average spend per trip on Orkney itself (£238). As shown later (in table 3.12), this reflected that they spent more days on the islands than other visitors. Holidaymakers spent an average of £217, whilst those on business trips spend the lowest amount (£200), almost half of which goes on accommodation. VFR had the highest levels of average spend for entertainment and recreation, "tourist" shopping (i.e. gifts, etc.) and food and drink bought outside their accommodation.

**Table 3.9: Average expenditure per person per trip 2013 (£): by trip purpose**

| **Category** | **Business** | **Holiday** | **VFR** |
|---|---|---|---|
| Travel to/from mainland/departure point | 221 | 180 | 157 |
| Price of package/inclusive holiday | 0 | 90 | 25 |
| Travel costs on the islands | 23 | 19 | 38 |
| Accommodation (including any food and drink) | 96 | 77 | 77 |
| Food and drink bought elsewhere | 59 | 43 | 61 |
| Entertainment and Recreation | 4 | 12 | 22 |
| Shopping for gifts, souvenirs, crafts, etc. | 12 | 19 | 24 |
| Other Shopping | 4 | 2 | 2 |
| Miscellaneous Spend | 2 | <1 | 2 |
| | | | |
| **Total spend both on and off Orkney** | **421** | **442** | **408** |
| | | | |
| **Total spend on Orkney** | **200** | **217** | **238** |

Table 3.10 compares the 2013 spend profile to that for 2009. *Business* visitors' total spend was £90 more than in 2009, largely because of a significant increase in the cost of travel to/from Orkney. Their spend on the islands was also higher (by £14), reflecting higher amounts than in 2009 for both accommodation and food and drink bought elsewhere. Levels of more discretionary spend (notably shopping for gifts, etc) have decreased since 2009.

*Holiday* visitors' total trip spend was £85 higher than in 2009. Again, this is primarily due to a marked increase in the cost of travelling to/from Orkney. Their spend while on the island was, however, £30 lower than in 2009 despite an increase in the average amount spent on package/inclusive holidays. Spend on accommodation fell between the two years, but the main reason for the decrease in spend was the decline (of more than £30) of spend on shopping and miscellaneous items.

Total spend by those on *VFR trips* rose significantly between the 2009 and 2013, with some of the increase due to spend on package/inclusive holidays and the costs of getting to/from Orkney. Average spend on Orkney also increased significantly, by more than £75 per trip reflecting an increase in VFR length of stay. These visitors' average spend grew in most categories and for accommodation in particular; there was a decline in spend on shopping and miscellaneous items.

**Table 3.10: Trip purpose: Average expenditure per person per trip: 2013 and 2009**

| | Business | | Holiday | | VFR | |
|---|---|---|---|---|---|---|
| **Category** | **2013** | **2009** | **2013** | **2009** | **2013** | **2009** |
| Travel to/from mainland/departure point | 221 | 143 | 180 | 90 | 157 | 121 |
| Price of package/inclusive holiday | 0 | 5 | 90 | 35 | 25 | 0 |
| Travel costs on the islands | 23 | 23 | 19 | 24 | 38 | 18 |
| Accommodation (including any food and drink) | 96 | 83 | 77 | 90 | 77 | 43 |
| Food and drink bought elsewhere | 59 | 38 | 43 | 46 | 61 | 35 |
| Entertainment and Recreation | 4 | 6 | 12 | 18 | 22 | 11 |
| Shopping for gifts, souvenirs, crafts, etc. | 12 | 23 | 19 | 37 | 24 | 41 |
| Other Shopping | 4 | 11 | 2 | 17 | 2 | 13 |
| Miscellaneous Spend | 2 | | <1 | | 2 | |
| | | | | | | |
| **Total spend both on and off Orkney** | **421** | **331** | **442** | **357** | **408** | **282** |
| | | | | | | |
| **Total spend on Orkney** | **200** | **186** | **217** | **250** | **238** | **161** |

*3.2.3 Expenditure on local products and produce*

Visitors were also asked to report their expenditures on each of the following:

- Local crafts such as jewellery, pottery, furniture.
- Local food e.g. fish, meat, cheese, sweets, oatcakes.
- Local beverages/drinks such as whisky, wine, beer, non-alcoholic drinks.

This may have been be challenging for some respondents who may not have known if a specific product or produce was local to Orkney and the results shown in Table 3.11 should, therefore, be treated with caution.

Table 3.11 shows that the average reported spend on local items was around £30, with slightly more than half of this on crafts and most of the rest on food. Overall, the results imply that 14% of total visitor expenditure was on local products and produce.

The results should be treated with some caution given that the average spend levels reported for *all* shopping for gifts souvenirs, crafts, etc. was only £19 (as shown at Table 3.7).

The £30 spent on local products and produce was higher than the figure in the 2009 survey (around £25). This confirms that the 2013 results should be interpreted with caution given the fall in discretionary spend between the two surveys, as shown at Table 3.8.

**Table 3.11: Expenditure on local products and produce (£)**

| Product/produce | Ave spend per trip | Total spend |
|---|---|---|
| Crafts | 16.41 | 2,344,113 |
| Food | 7.55 | 1,077,737 |
| Beverages | 6.32 | 903,088 |
| **Total** | **30.28** | **4,324,938** |

*3.2.4 Average expenditure in Orkney by visitor type*

Table 3.12 presents additional results for particular visitor types. It shows an average length of stay on Orkney of 5.1 days for all visitors, higher than the 2009 figure of 4.7 days. The average spend per day for 2013 is £42 compared with £48 in 2009: this fall was due to the increased length of stay in 2013 as spend per visitor *trip* is identical in both surveys.

VFR visitors had the highest average length of stay (over seven days) with business visitors having a similar length of stay (6.7). Holiday visitors' stays were clearly shorter, averaging 4.1 days.

Both VFR and business visitor length of stay have increased since 2009. For the former it has risen from 5.7 days to over seven days, but the increase for business visitors is even more marked as their average stay has increased from 3.7 days in 2009 to 6.7 in 2013. In contrast, holiday visitors' average length of stay has fallen (by 0.6 days) between 2009 and 2013.

The results of these factors are that:

- Holidaymakers' spend per day is unchanged: at £53 it was the same as in 2009.
- Business visitors' average spend per day has fallen from £50 to £30.
- VFR spend per day has increased from £28 to £33. Thus, the increase in VFR spend per trip was not solely due to their staying longer in Orkney.

As is generally the case, expenditure per day was highest among those who spend the least time in Orkney. For example, those staying for up to three nights had an average spend of £74 per day, compared with an average spend of £24 for those staying eight or more nights (the average length of stay for those visiting for eight or more nights was 17 nights).

**Table 3.12: Average expenditure in Orkney by visitor type (£)**

| Type | Expenditure per trip | Length of stay | Expenditure per person per day |
|---|---|---|---|
| **All Visitors** | **218** | 5.1 | 42 |
| | | | |
| **Trip Purpose** | | | |
| Holiday | **217** | 4.1 | 53 |
| VFR | **238** | 7.3 | 33 |
| Business | **200** | 6.7 | 30 |

**Table 3.12: Average expenditure in Orkney by visitor type (£) *(Continued)***

| **Length of Stay In Orkney** | | | |
|---|---|---|---|
| 1-3 nights | **152** | 2.0 | 74 |
| 4-7 nights | **274** | 5.8 | 47 |
| 8+ nights | **430** | 17.6 | 24 |
| | | | |
| **Origin** | | | |
| Scotland | **174** | 4.5 | 39 |
| Rest of UK | **239** | 5.8 | 41 |
| Overseas | **253** | 5.2 | 48 |

Further information on business visitors is given in Table 3.13. Business visitors who stayed up to three nights spent an average of £81 per night. At the other end of the spectrum those staying at least eight nights had an average length of stay of over 28 nights: their spend per trip was relatively high (£558), equating to a low average spend per day (£20). This appears to reflect a number of business visitors working in the islands for considerable periods who also generally have a low level of spend per day.

**Table 3.13: Average expenditure in Orkney by business visitors (£)**

| **Type** | **Expenditure per trip** | **Length of stay** | **Expenditure per person per day** |
|---|---|---|---|
| **All Business Visitors** | **200** | 6.7 | 30 |
| | | | |
| **Length of Stay in Orkney** | | | |
| 1-3 nights | 138 | 1.7 | 81 |
| 4-7 nights | 166 | 5.0 | 33 |
| 8+ nights | 558 | 28.5 | 20 |

Table 3.12 showed that overseas visitors had a higher spend per trip than those from the UK and Table 3.14 presents further information on overseas visitor spend. The highest spend *per trip* was by those on business, reflecting their very high average length of stay. The highest spend *per day* was very clearly by those on holiday.

**Table 3.14: Average expenditure in Orkney by overseas visitors (£)**

| **Type** | **Expenditure per trip** | **Length of stay** | **Expenditure per person per day** |
|---|---|---|---|
| **All Overseas Visitors** | **253** | **5.2** | **48** |
| | | | |
| **Trip Purpose** | | | |
| Holiday | 229 | 3.4 | 67 |
| VFR | 356 | 10.1 | 35 |
| Business | 396 | 22.3 | 18 |

### 3.3 Total Volume and Value

Table 3.15 gives estimates of the annual volume and value of visitors in the period covered by the 2012-2013 survey.

Around 143,000 visitors had a total spend of more than £31 million, with around two thirds of that expenditure (over £20 million) from those on holiday. The remaining expenditures were split broadly evenly between VFR (£5.8 million) and business (£5.2 million).

**Table 3.15: Total annual volume and value (2013)**

| Purpose | Number of visitors | Average spend per trip (£) | Total spend (£) | Share of total spend % |
|---|---|---|---|---|
| Holiday | 92,268 | 217 | 20,061,116 | 65 |
| VFR | 24,437 | 238 | 5,821,934 | 19 |
| Business | 26,111 | 200 | 5,214,987 | 17 |
| **Total** | **142,816** | **218** | **31,098,038** | **100** |

Table 3.16 shows estimates of volume and value by visitor origin. Scottish residents account for most (39%) visitors, but only 31% of the spend (over £9 million). Visitor numbers from the rest of the UK and overseas are significant and their higher than average spend per trip means that for both groups their total spend is higher than that of Scottish residents: rest of UK accounts for just over £11 million spend and overseas visitors for £10 million.

**Table 3.16: Total annual volume and value (2013)-by visitor origin**

| Purpose | Number of visitors | Average spend per trip (£) | Total spend (£) | Share of total spend % |
|---|---|---|---|---|
| Scotland | 55,492 | 174 | 9,662,419 | 31 |
| Rest of UK | 47,478 | 239 | 11,354,939 | 37 |
| Overseas | 39,847 | 253 | 10,080,680 | 32 |
| **Total** | **142,816** | **218** | **31,098,038** | **100** |

Table 3.17 presents the same information from the 2009 visitor survey. Without allowing for inflation the 2013 spend (of around £31.1 million) was slightly lower than that for 2009 (around £31.7 million). This reflects a decrease in total holiday visitor expenditure as a result of a slight fall in holiday visitor numbers and a lower average spend per trip. This decrease was, however, partly offset by increased total spend by both business and VFR visitors.

Adjusting the 2009 total for price inflation (based on the Consumer Price Index) gives a figure of £36,040,358 in 2012-2013 prices. This compares to the 2013 figure of £31,098,038 as shown at Table 3.16. This means that the total visitor spend in 2013 was around £4.9 million lower than the inflation-adjusted 2009 figure. That reflects in particular the real terms decrease in visitors' average spend per trip. This (and the slight increase in visitor numbers in 2013) need to be viewed in the context of the continued economic downturn since 2009, with its negative impact on real term income levels.

**Table 3.17: Total annual volume and value (2009)**

| Purpose | Number of visitors | Average spend per trip (£) | Total spend (£) | Share of total spend % |
|---|---|---|---|---|
| Holiday | 94,276 | 250 | 23,569,000 | 74 |
| Business | 21,955 | 186 | 4,083,630 | 13 |
| VFR | 24,941 | 161 | 4,015,501 | 13 |
| **Total** | **141,172** | **224*** | **31,668,131** | **100** |

*Note: This figure is taken from the relevant table in the 2009 report although elsewhere in that report a figure of £218 per trip is shown (as was reproduced at table 3.8).

### 3.4 Other Visitor Activity: Yachts and Cruise Liners

In addition to the visitors covered by this survey, there are also visitors to Orkney who arrive by yacht or cruise liner.

- Data from Orkney Marinas Ltd show a total of 745 visiting boats arriving in Orkney during calendar year 2013. They had a total of 2,015 crew members, each staying an average of four nights.

- Orkney Islands Council, in conjunction with Cruise Britain, commissioned GP Wilde (a cruise ship survey organisation) to conduct passenger surveys during the 2013 cruise ship season in both Kirkwall and Stromness. This exercise also included supply-side research with Orkney businesses. It is hoped that a copy of the full report of the surveys will be available soon.

## 4. PROFILE OF VISITORS

Face-to-face survey respondents were asked to provide information on the gender and age of the people in their group. In all, respondents provided information on 2,782 visitors.

### 4.1 Gender Profile

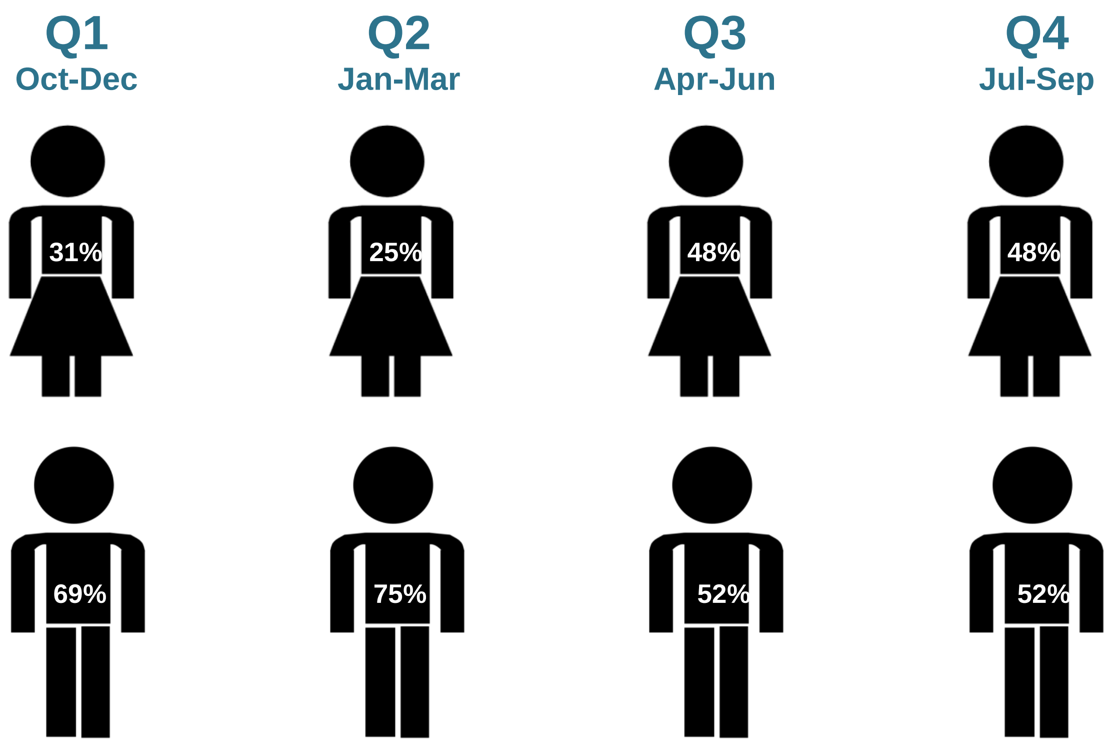
*4.1.1 Gender profile – 2013*

Overall, 55% of visitors were male and this pattern was reflected across the research period with more male than female visitors recorded in each quarter, particularly between January-March. The differences in gender between April–June and July-September are smaller, suggesting a more even gender profile in these spring/summer months.

**Table 4.1: Gender of visitors**
**Base: all face-to-face visitors (2,782)**

| | % |
|---|---|
| Female | 45 |
| Male | 55 |

**Chart 4.1: Gender of visitors – by quarter**
**Base: all visitors (2,782)**



*4.1.2 Gender profile - comparison with previous visitor surveys*

The profile of the gender and age of visitors is based on the data that respondents provided on their group in 2009 and 2013: the total number of visitors for each survey is shown in the tables.

The proportion of female visitors has decreased significantly since 2009 from 51% to 45%. The reason for this appears to be that business visitors are much more likely to be male than female and an increase in business visitors to Orkney compared with 2009 could account for the change in proportion of male visitors (note: the 2009 results do not provide a breakdown of gender of business visitors).

**Table 4.2: Gender of visitors - comparison with previous visitor surveys**
**Base: all visitors**

| | 2013 | 2009 |
|---|---|---|
| Number of visitors | 2782 | 2748 |
| | % | % |
| Female | 45 | 51 |
| Male | 55 | 49 |

## 4.2 Age Profile

*4.2.1 Age profile - 2013*

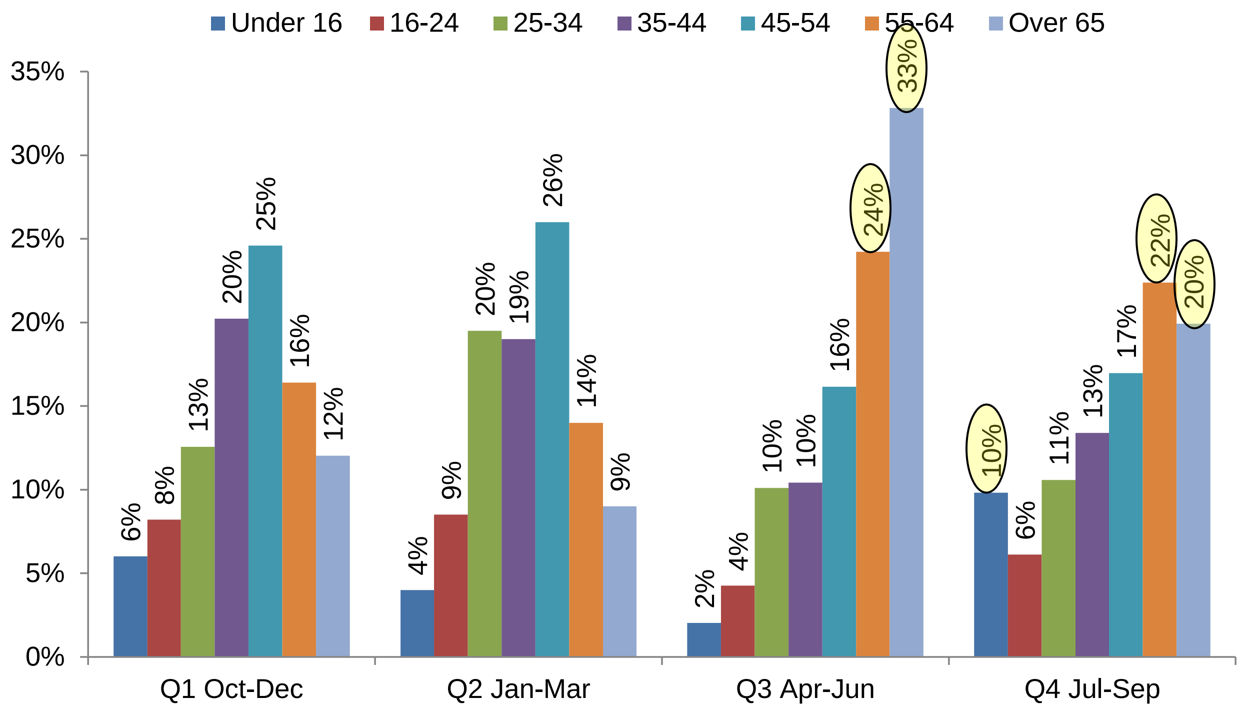
Table 4.3 shows that nearly two-thirds of visitors were over the age of 45 (63%). However, when viewed by quarter, the age profile of visitor displays some noticeable variations. Chart 4.2 highlights how the age of respondents increased as the research period progressed, for instance with respondents aged 55+ making up a larger proportion of respondents between April-June and July-September. This reflects the increased likelihood of these groups holidaying in the warmer spring/summer months.

Of note, the percentage of under 16s increased significantly between July-September, a period which covers school holidays.

**Table 4.3: Age of visitors**
**Base: all face-to-face visitors (2,782)**

| | % |
|---|---|
| Under 16 | 7 |
| 16-24 | 6 |
| 25-34 | 11 |
| 35-44 | 13 |
| 45-54 | 18 |
| 55-64 | 22 |
| 65+ | 23 |

**Chart 4.2: Age of visitors – by research quarter**
**Base: all face-to-face visitors (2,782)**




*4.2.2 Age profile - comparison with previous visitor surveys*

The age profile of visitors has remained very similar since 2009, with the only change appearing in the 55+ age groups. The data suggests that there has been a slight decrease in visitors aged 55-64 and a slight increase in those over the age of 65.

**Table 4.4: Age of visitors - comparison with previous visitor surveys**
**Base: all visitors**

| | **2013** | **2009** |
|---|---|---|
| Number of visitors | 2782 | 2748 |
| | % | % |
| Under 16* | 7 | 8 |
| 16-24 | 6 | 7 |
| 25-34 | 11 | 11 |
| 35-44 | 13 | 13 |
| 45-54 | 18 | 18 |
| 55-64 | 22 | 24 |
| 65+ | 23 | 19 |

*Under 15 in 2009 surveys

Sections 4.3 and 4.4 present further demographic information based on respondents, rather than visitors. As this information is on household residence and social grade it was not necessary to gather information from all visitors to inform an accurate profile.

## 4.3 Residence Profile

*4.3.1 Residence profile – 2013*

Overall, just over two-fifths (43%) of respondents were from Scotland with nearly a third from elsewhere in the UK and Ireland. Quarterly results, displayed in table 4.5, show a clear pattern with more respondents from overseas (Europe, Rest of world) between April-June and especially July-September when overseas visitors accounted for a third of all respondents.

**Chart 4.3: Residence of Respondents**
**Base: all face-to-face respondents (1,328)**

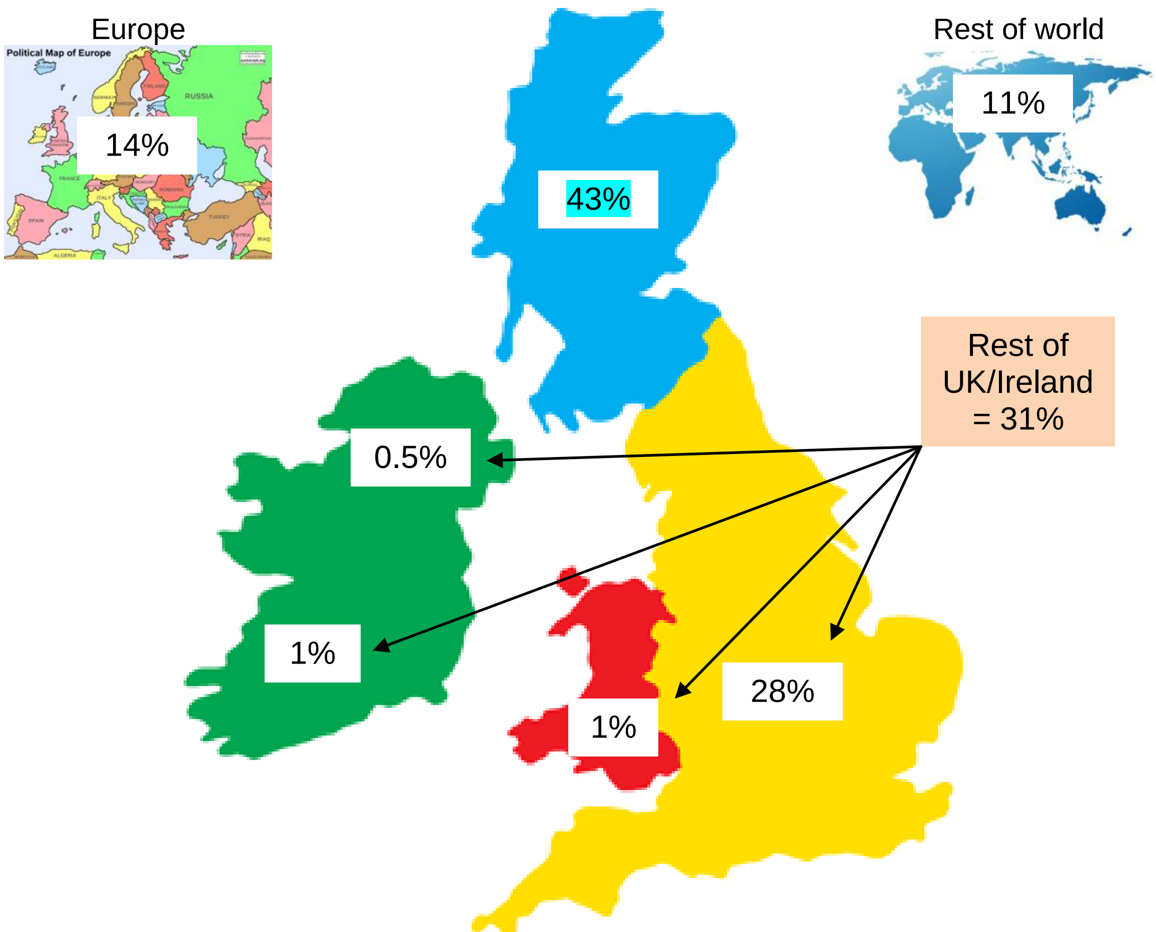



**Table 4.5: Residence of respondents – by quarter**
**Base: all face-to-face respondents (1,328)**

| | Q1 % Oct-Dec | Q2 % Jan-Mar | Q3 % Apr-Jun | Q4 % Jul-Sep |
|---|---|---|---|---|
| Scotland | 67 | 66 | 41 | 37 |
| Rest of UK/Ireland | 23 | 26 | 37 | 31 |
| Europe | 8 | 2 | 13 | 18 |
| Rest of world | 1 | 7 | 8 | 15 |

The table below displays the residence of respondents in more detail and highlights that from Europe, Germany was the most common country represented by respondents, whilst from the rest of the world, Americans and Australians made up an almost equal proportion of respondents. Excluding the UK and Ireland, 35 other countries were represented by respondents during the research period.

**Table 4.6: Residence of respondents – Detailed results**
**Base: all respondents (1,328)**

| | % |
|---|---|
| Scotland | 43 |
| | |
| Rest of UK | 31 |
| *- England* | *28* |
| *- Wales* | *1* |
| *- Republic of Ireland* | *1* |
| *- Northern Ireland* | * |
| *- Other UK e.g. Isle of Man* | * |
| | |
| Europe | 14 |
| *- Germany* | *5* |
| *- France* | *2* |
| *- Switzerland* | *1* |
| *- The Netherlands* | *1* |
| *- Norway* | *1* |
| *- Italy* | *1* |
| *- Spain* | *1* |
| *- Belgium* | * |
| *- Czech Republic* | * |
| *- Sweden* | * |
| *- Poland* | * |
| *- Austria* | * |
| *- Denmark* | * |
| *- Russia* | * |
| *- Other Europe* | *1* |
| | |
| Rest of world | 11 |
| *- USA* | *4* |
| *- Australia* | *3* |
| *- Canada* | *2* |
| *- New Zealand* | *1* |
| *- Other country* | *1* |

Other Europe: Luxembourg (2), Andorra, Finland, Iceland, Portugal, Romania, Slovakia (1)
Other country: Japan (3), South Africa, Hong Kong (2), Antigua, Argentina, China, Kenya, Philippines, South Korea, Thailand (1)

Within Scotland respondents were most likely to be residing in the Highlands (22%) or Aberdeenshire (11%) with these two areas accounting for a third of all Scottish respondents.

**Table 4.7: Residence of respondents – Detailed results on Scottish residence**
**Base: all respondents resident in Scotland (577)**

| | % |
|---|---|
| Highland | 22 |
| Aberdeenshire | 11 |
| Edinburgh, City of | 9 |
| Glasgow City | 8 |
| Fife | 5 |
| Aberdeen City | 5 |
| Shetland Islands | 5 |
| Moray | 4 |
| Angus | 3 |
| Perth & Kinross | 3 |
| South Ayrshire | 2 |
| South Lanarkshire | 2 |
| Dumfries & Galloway | 2 |
| Argyll & Bute | 2 |
| Stirling | 2 |
| Scottish Borders | 2 |
| North Lanarkshire | 2 |
| Other | 12 |

Others, all 1% were West Lothian, Midlothian, Renfrewshire, West Dunbartonshire, Dundee City, East Ayrshire, East Dunbartonshire, East Lothian, North Ayrshire, Falkirk, Clackmannanshire, East Renfrewshire

English respondents resided in a range of areas with no-one area dominating the results, although a quarter (27%) were from the South East/West (39% if Greater London is included) and nearly a quarter from the North of England (24%).

**Table 4.8: Residence of respondents – Detailed results on English residence**
**Base: all respondents resident in England (378)**

| | % |
|---|---|
| North West | 16 |
| South East | 15 |
| Yorkshire/Humberside | 13 |
| South West | 12 |
| Greater London | 12 |
| East Midlands | 9 |
| North East | 8 |
| West Midlands | 8 |
| East Anglia/East of England | 6 |

*4.3.2 Residence profile - comparison with previous visitor surveys*

All three surveys used respondent data to provide the profile of visitors relating to area of residence, social grade and party type.

The key changes in area of residence of visitors are a decrease in visits from Scottish residents and an increase in the proportion of visitors from overseas. The changes are much higher for the 2009 survey than for the 2005 survey, suggesting that 2009 results may reflect an increase in Scottish visitors which has subsequently returned to 2005 levels.

**Table 4.9: Area of residence - comparison with previous visitor surveys**
**Base: all respondents**

| | 2013 | 2009 | 2005 |
|---|---|---|---|
| Number of respondents | 1328 | 1149 | 1273 |
| | % | % | % |
| Scotland | 43 | 49 | 42 |
| Rest of UK/Ire | 31 | 33 | 34 |
| Overseas | 25 | 18 | 21 |

### 4.4 Socio-economic Profile

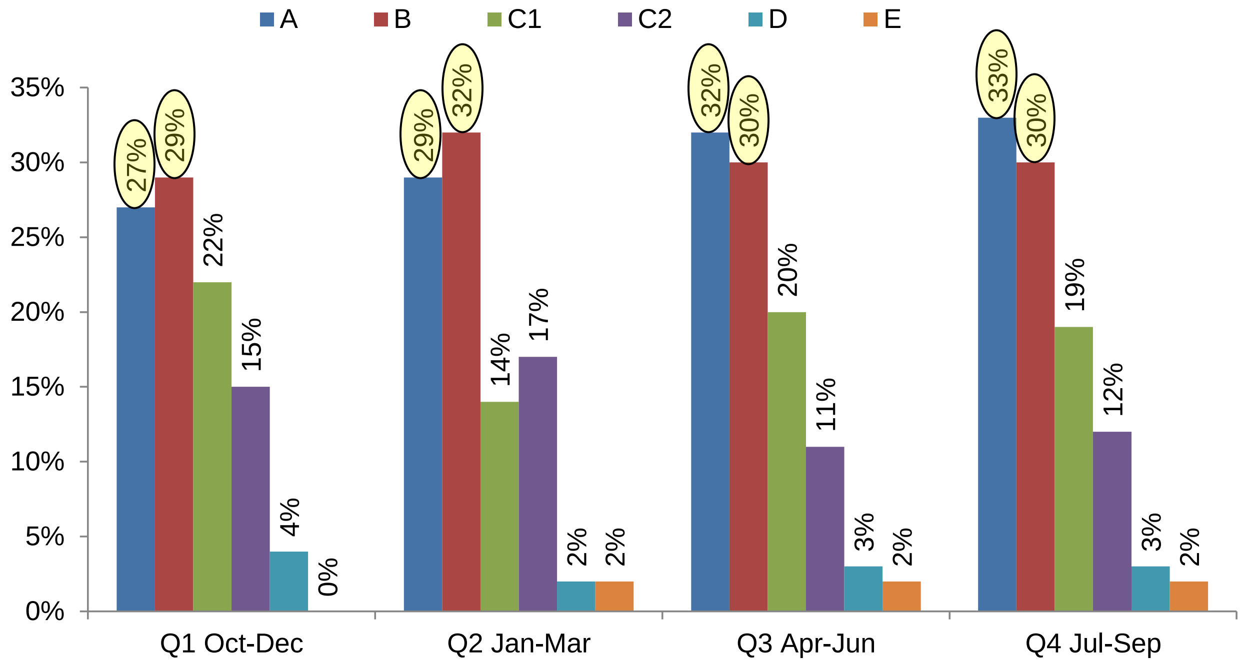
*4.4.1 Socio-economic profile – 2013*

Social grades A and B accounted for 62% of respondent households and this trend was consistent across the research period as displayed in chart 4.4, with around three-fifths of respondents occupying the A and B grades in each quarter of the research.

**Table 4.10: Social grade of respondents**
**Base: all face-to-face respondents (1,328)**

| | % |
|---|---|
| A – upper middle class | 32 |
| B - middle class | 30 |
| C1 – lower middle class | 19 |
| C2 – skilled working class | 12 |
| D – working class | 3 |
| E - those at lowest level of subsistence | 2 |

**Chart 4.4: Social grade of respondents – by research quarter**
**Base: all face-to-face respondents (1,328)**




*4.4.2 Socio-economic profile - comparison with previous visitor surveys*

The social grade of visitors has shown a significant change, particularly compared with 2009. The proportion of ABs has decreased from 75% in 2009 to 62% in 2013. In contrast the proportion of C1C2s has increased from 24% to 31%. The 2013 survey involved showing respondents a list of occupations corresponding to social grades (developed by VisitScotland) and asking them to select the category they felt best described the main income earner. The previous surveys used the technique of asking respondents the occupation of the chief income earner and assigning social grade post interview.

**Table 4.11: Social grade - comparison with previous visitor surveys**
**Base: all respondents**

| | **2013** | **2009** | **2005** |
|---|---|---|---|
| Number of respondents | 1328 | 1149 | 1273 |
| | **%** | **%** | **%** |
| A | 32 | 38 | 33 |
| B | 30 | 37 | 34 |
| C1 | 19 | 15 | 14 |
| C2 | 12 | 9 | 10 |
| DE | 5 | 1 | 9 |
| No response | 2 | 1 | 9 |

## 4.5 Group Profile

*4.5.1 Group profile - 2013*

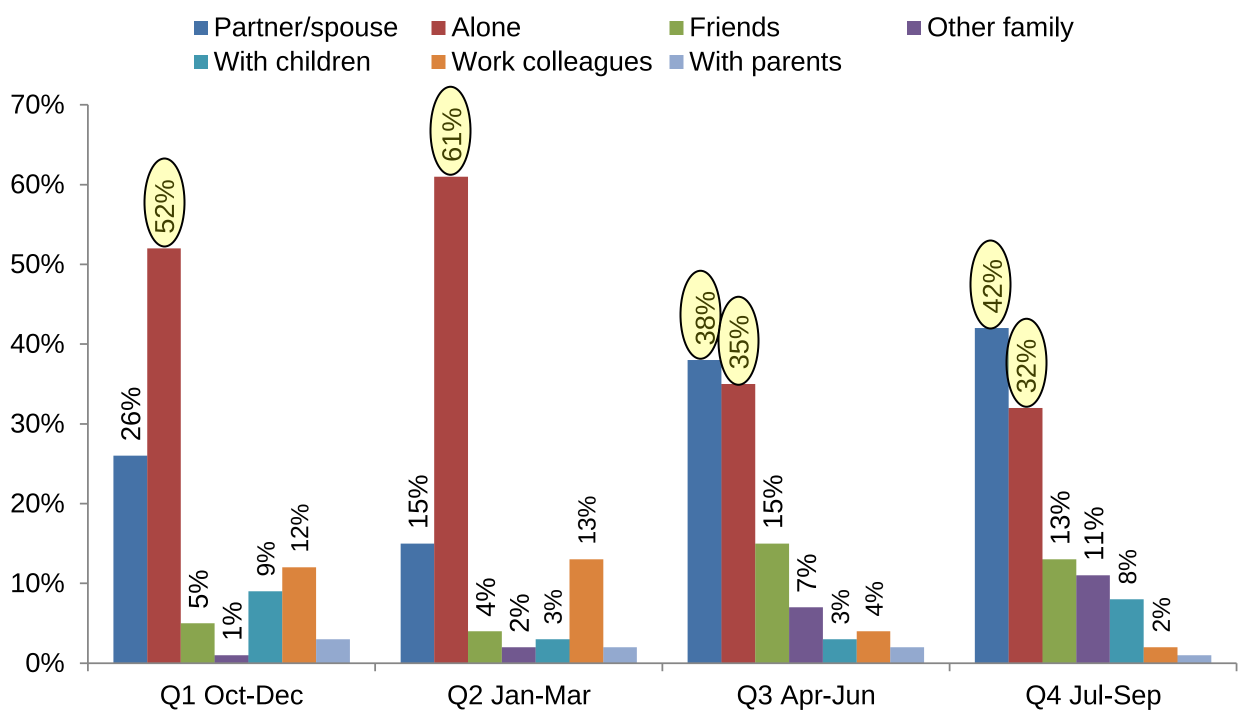
Respondents were equally likely to be travelling with their partner/spouse or alone, with these groups accounting for three-quarters of respondents. Across the research period this overall trend only appeared between April-September. In the preceding six months (October-March) respondents were most likely to be travelling alone, a consequence of the larger proportion of business respondents during this period.

**Table 4.12: Group profile of respondents**
**Base: all face-to-face respondents (1,328)**

| | % |
|---|---|
| Partner/spouse | 37 |
| Travelling alone | 37 |
| Friends | 12 |
| Other members of family | 8 |
| With child/children | 6 |
| Business/work colleagues | 4 |
| With parents/partners parents | 1 |

Note: some respondents gave more than one answer to this question.

**Chart 4.5: Group profile of respondents – by research quarter**
**Base: all face-to-face respondents (1,328)**



*4.5.2 Group profile - comparison with previous visitor surveys*

Visitors were more likely to be travelling on their own in 2013 than in previous surveys, probably reflecting the higher proportion of business visitors who tend to travel alone. The proportions of other party types have remained relatively stable. (Note: the 2013 question allowed multiple answers, whilst the previous surveys were single answers).

**Table 4.13 Party type - comparison with previous visitor surveys**
**Base: all respondents**

| | **2013** | **2009** | **2005** |
|---|---|---|---|
| Number of respondents | 1328 | 1149 | 1273 |
| | *%* | *%* | *%* |
| Partner/spouse<br>(*part of couple - 2009/2005)* | 37 | 39 | 36 |
| Travelling alone | 37 | 32 | 29 |
| Friends | 12 | 10 | 13 |
| Other members of family/children | 14 | 16 | 16 |
| Business/work colleagues | 4 | 2 | 2 |
| With parents/partners parents | 1 | n/a | n/a |

## 4.6 Profile of Visitors – Island Comparisons

Table 4.14 displays the profile of visitors on each of the three island groups. The results show some similarities and differences:

- There were more male than female visitors on all the islands and the gender profiles on Orkney and the Outer Hebrides were identical, whilst Shetland differed slightly with more male visitors compared to Orkney and the Outer Hebrides
- Over 45s accounted for around three-fifths of visitors on each island
- The Outer Hebrides had the highest proportion of visitors from Scotland whilst visit levels from the UK/Ireland were similar on each island. Orkney had the most visitors from overseas (Europe/Rest of world) accounting for a quarter of visitors
- The social grade of visitors on Orkney and the Outer Hebrides was similar with ABs accounting for around three-fifths of visitors. On Shetland, the BC1 grades accounted for a similar proportion of visitors
- Travelling alone or with partner/spouse were the most common types of group on all the islands though the balance varied by island with travelling alone more common on Shetland and with partner/spouse most common on the Outer Hebrides

**Table 4.14: Profile of Visitors – by Island**
**Base: all visitors**

| | Orkney % | Outer Hebrides % | Shetland % |
|---|---|---|---|
| **Gender** | | | |
| Female | 45 | 45 | 40 |
| Male | 55 | 55 | 60 |
| | | | |
| **Age** | | | |
| Under 16 | 7 | 10 | 3 |
| 16-24 | 6 | 6 | 12 |
| 25-34 | 11 | 12 | 16 |
| 35-44 | 13 | 14 | 12 |
| 45-54 | 18 | 21 | 19 |
| 55-64 | 22 | 19 | 17 |
| 65+ | 23 | 19 | 20 |
| | | | |
| **Residence** | | | |
| Scotland | 43 | 58 | 48 |
| Rest of UK/Ire | 31 | 29 | 33 |
| Europe | 14 | 8 | 11 |
| Rest of world | 11 | 4 | 8 |
| | | | |
| **Social grade** | | | |
| A – upper middle class | 32 | 28 | 17 |
| B - middle class | 30 | 33 | 32 |
| C1 – lower middle class | 19 | 19 | 26 |
| C2 – skilled working class | 12 | 15 | 16 |
| D – working class | 3 | 3 | 4 |
| E - lowest level of subsistence | 2 | 1 | 2 |
| | | | |
| **Group type** | | | |
| Travelling alone | 37 | 32 | 53 |
| Partner/spouse | 37 | 47 | 21 |
| Friends | 12 | 9 | 7 |
| Other members of family | 8 | 8 | 6 |
| Business/work colleagues | 4 | 5 | 10 |
| With child/children | 6 | 11 | 2 |
| With parents/partner's parents | 1 | 4 | 1 |

# 5. TYPE OF VISIT

## 5.1 Main Type of Visit

*5.1.1 Type of visit – summary*

With reference to a pre-coded list, respondents selected the option which best described their visit to Orkney. Face-to-face survey results show that half of respondents were on a holiday/short break overnight, whilst just over a fifth where on an overnight business trip.

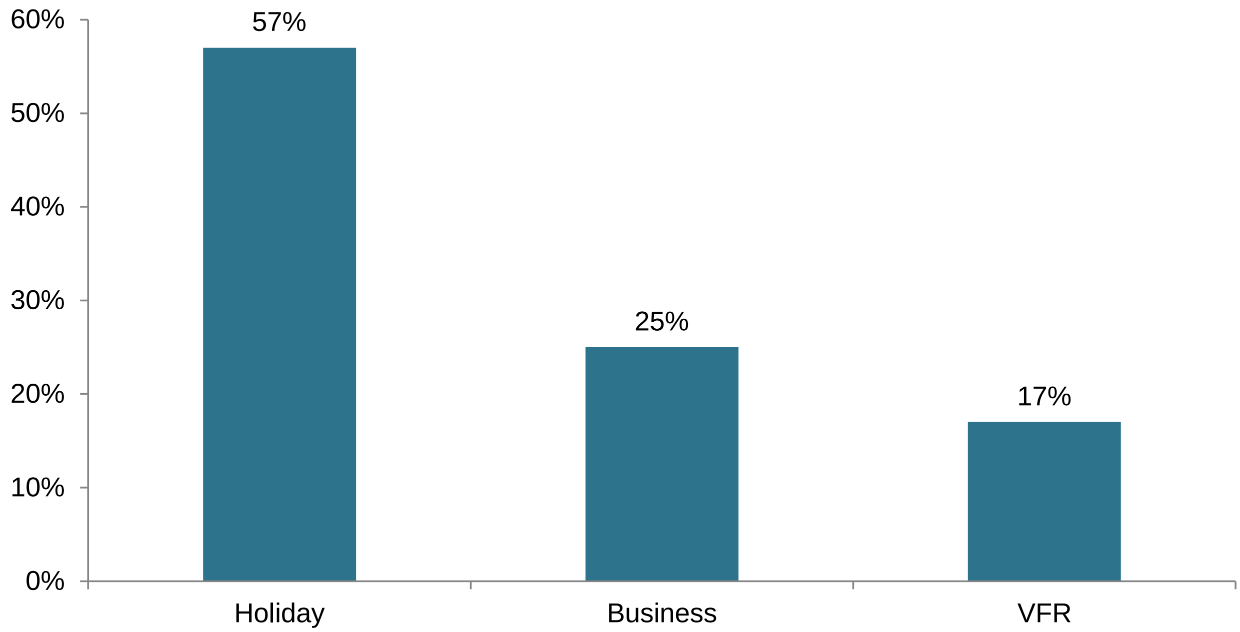
The online survey gave visitors an additional opportunity to provide some more detailed feedback on their visitor experience. Respondents to this survey were also asked about type of visit. A similar proportion were holiday visitors but fewer had visited for business purposes.

**Table 5.1: Main type of visit**
**Base: all face-to-face (1,328) and online respondents (821)**

| | Face-to-face | Online |
|---|---|---|
| | % | % |
| Holiday/short break involving staying overnight | 50 | 53 |
| On business - overnight trip | 22 | 11 |
| Visiting friends/relatives for leisure/holiday - overnight | 15 | 9 |
| Holiday - day trip | 7 | 11 |
| On business - day trip | 3 | 2 |
| Combining business and holiday | 2 | 3 |
| Visiting friends or relatives for leisure/holiday - day trip | 2 | 3 |

The above results help establish the percentage of respondents making holiday, VFR or business type visits. Chart 5.1 highlights the predominance of holiday visits amongst face-to-face Orkney respondents.

**Chart 5.1: Main type of visit**
**Base: all face-to-face respondents (1,328)**



*5.1.2 Type of visit – by research quarter*

The percentage of respondents on holiday visits increased significantly between April-September (compared to October-March), whilst in contrast the percentage of respondents on business peaked between October-March before decreasing during April-September. There was a clear trade-off between the percentage of holiday and business respondents at different times of the year. The percentage of VFR respondents was quite even across the year (compared to holidays and business), suggesting that these types of visits are less affected by seasonal factors.

**Table 5.2: Main types of visit – by quarter**
**Base: all face-to-face respondents (1,328)**

| | **Q1 %** Oct-Dec | **Q2 %** Jan-Mar | **Q3 %** Apr-Jun | **Q4 %** Jul-Sep |
|---|---|---|---|---|
| Holiday | 32 | 18 | 59 | 65 |
| Business | 51 | 64 | 23 | 15 |
| VFR | 12 | 15 | 16 | 17 |

*5.1.3 Type of visit - comparison with previous visitor surveys*

There have been significant changes in the types of visit to Orkney:

- the proportion of holiday visitors is down to 57% in 2013 from 67% in 2009. This decrease appears to be due to a decline in the holiday day trip visitor market: this was recorded as 16% of all visitors in 2009 and only 7% in 2013.
- in contrast, the proportion of business visitors has increased from 16% in 2009 to 27% in 2013. The increase stems from a rise in the proportion of overnight business trips which now account for 22% of visits, compared with 10% in 2009.
- the proportion of VFR visitors has remained the same across both surveys at 17%

**Table 5.3: Main type of visit - comparison with previous visitor surveys**
**Base: all respondents**

| | **2013** | **2009** | **2005** |
|---|---|---|---|
| Number of respondents | 1328 | 1149 | 1273 |
| | **%** | **%** | **%** |
| Holiday/short break - overnight | 50 | 51* | n/a |
| Holiday - day trip | 7 | 16 | n/a |
| **Holiday total** | **57** | **67** | **64** |
| | | | |
| Visiting friends/relatives - overnight | 15 | n/a | n/a |
| Visiting friends/relatives - day trip | 2 | n/a | n/a |
| **VFR total** | **17** | **17** | **21** |
| | | | |
| On business - overnight trip | 22 | 10 | n/a |
| On business - day trip | 3 | 3 | n/a |
| Combining business and holiday | 2 | 3 | n/a |
| **Business total** | **27** | **16** | **13** |

*This figure is shown as 41% in the 2009 report, but we believe that this is a typographical error as it does not add up to the total of 67%

## 5.2 Frequency of Visit

*5.2.1 Frequency of visit - 2013*

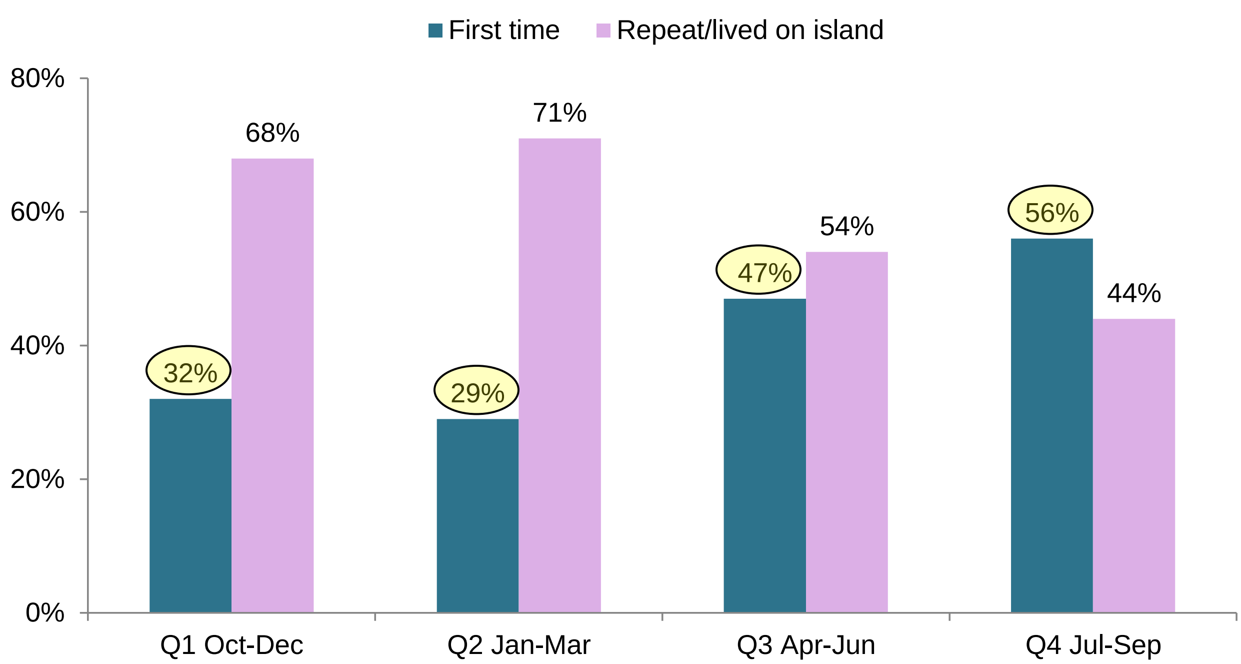
Viewed by visit type, first time and repeat visits can be further analysed. Respondents visiting for the first time were more likely to be on holiday (63%) than VFR (32%) or business (28%) whilst respondents on a repeat visit were quite likely to be visiting on business - 72%.

**Table 5.4: Frequency of visit – total and by type of visit**
**Base: all face-to-face respondents (1,328)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| This is my first visit | 49 | 63 | 32 | 28 |
| Repeat visit / lived on island | 51 | 37 | 68 | 72 |
| | | | | |
| *- Once before* | *11* | *14* | *6* | *7* |
| *- Twice* | *5* | *3* | *6* | *8* |
| *- 3-5 times* | *9* | *6* | *10* | *14* |
| *- 6-10 times* | *6* | *4* | *8* | *9* |
| *- More than 10 times* | *17* | *8* | *22* | *33* |
| *- Lived on island* | *4* | *2* | *16* | *1* |

The proportion of respondents on a first time visit increased as the research progressed into the April-September period with the impact coming largely from respondents on holiday, reflecting the increase in holiday visits shown in table 5.4 above.

**Chart 5.2: Frequency of visit – by quarter**
**Base: all face-to-face respondents (1,328)**



*5.2.2 Frequency of visit - comparison with previous visitor surveys*

The proportion of first time visitors has declined compared to 2009 and 2005, it now stands at 49% compared with 54% in the previous surveys. This can be attributed mainly to the decline in holiday visitors on first time visits which had fallen from 69% in 2009 to 63% in 2013.

Visitors are much more likely than in previous surveys to have visited Orkney more than 10 times: 17% had done so in 2013, more than double the percentage in 2009. This reflects the higher proportion of business visitors in 2013 as this group is much more likely than holidaymakers or VFR to visit 10 plus times.

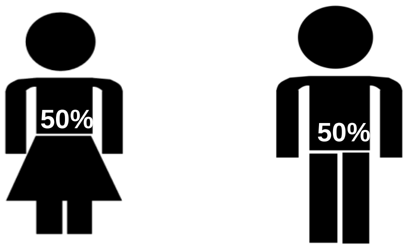
**Table 5.5: Frequency of visit - comparison with previous visitor surveys**
**Base: all respondents**

| | **2013** | **2009** | **2005** |
|---|---|---|---|
| Number of respondents | 1328 | 1149 | 1273 |
| | **%** | **%** | **%** |
| This is my first visit | 49 | 54 | 54 |
| Repeat visit / lived on island | 51 | 46 | 46 |
| | | | |
| *- Once before* | *11* | *15* | *4* |
| *- Twice* | *5* | *5* | *9* |
| *- 3-5 times* | *9* | *9* | *11* |
| *- 6-10 times* | *6* | *5* | *6* |
| *- More than 10 times* | *17* | *8* | *10* |
| *- Lived on island* | *4* | *4* | *5* |

A profile of each of the main visit types is presented in sections 5.2.3 to 5.2.5.

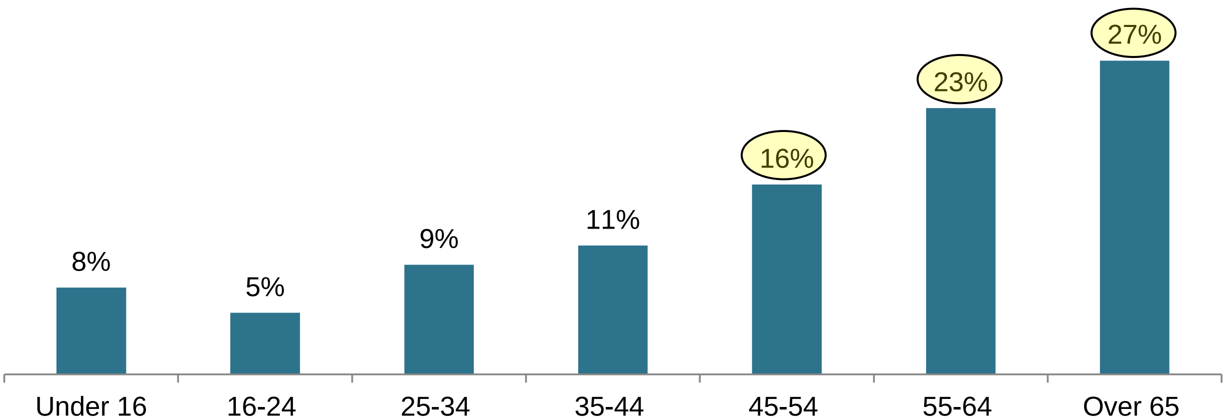
*5.2.3 Main type of visit – holiday*

Respondents on holiday[4] were equally likely to be male or female and almost two-thirds were making their first visit to Orkney.

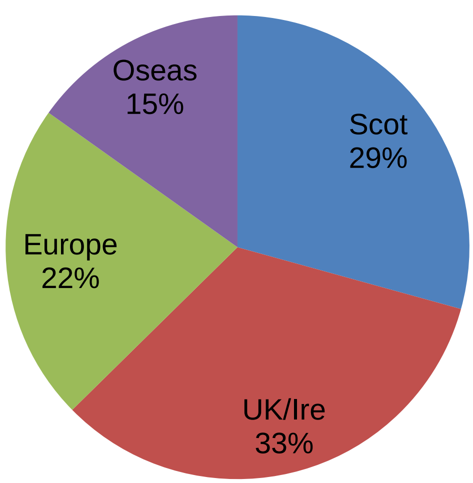


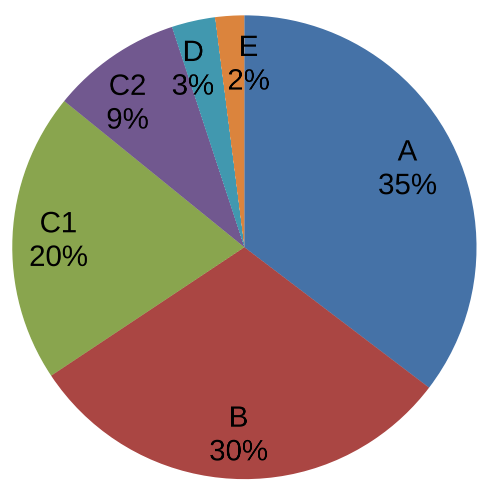


66% of respondents on holiday were aged 45+ with a clear trend towards older respondents.




A third of respondents on holiday were from the rest of the UK or Ireland whilst 37% were from Europe or overseas. The A and B social grades accounted for nearly two-thirds of all holiday respondents.



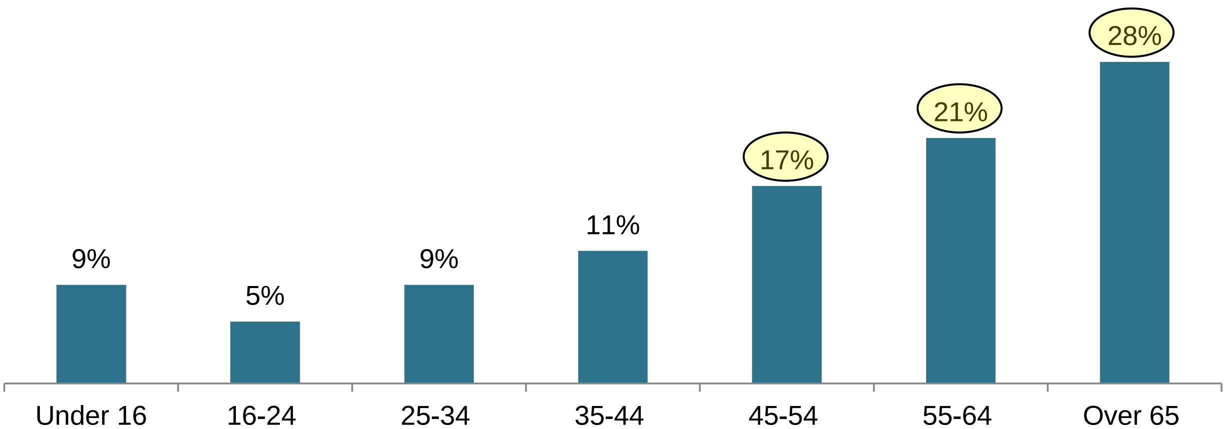

[4] Gender/Age based on 1877 visitors. Frequency/Residence/Social grade based on 756 respondents.

*5.2.4 Main type of visit – VFR*

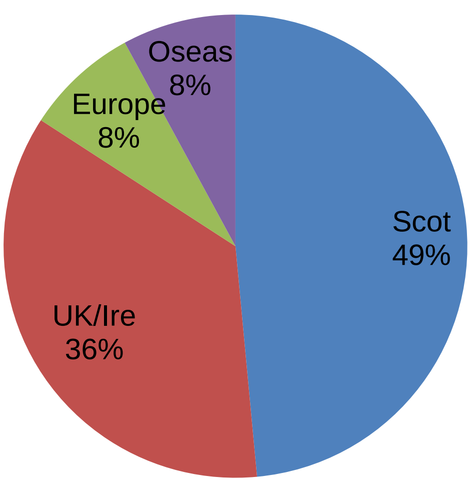
VFR respondents[5] were almost as likely to be female as male and over two-thirds were making a repeat visit to Orkney.

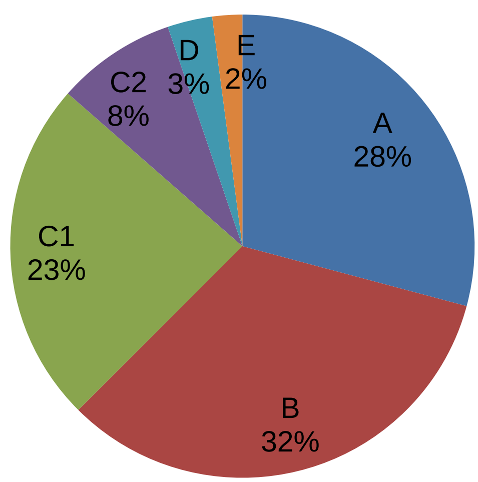


66% of VFR respondents were aged 45+ with a clear trend towards older respondents.




Almost half of VFR respondents were from Scotland and over a third were from the rest of the UK or Ireland. The A, B and C1 social grades accounted for 83% of VFR respondents.



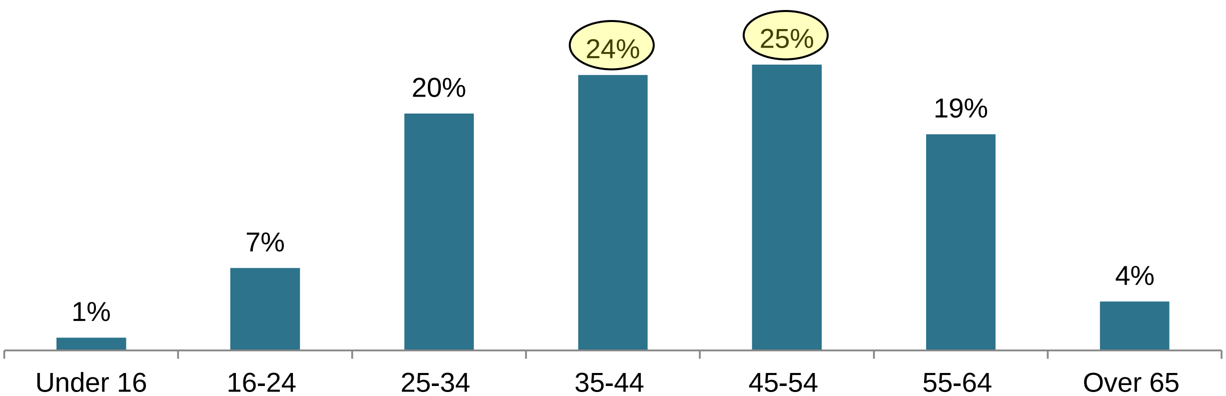

[5] Gender/Age based on 410 visitors. Frequency/Residence/Social grade based on 213 respondents.

*5.2.5 Main type of visit – business*

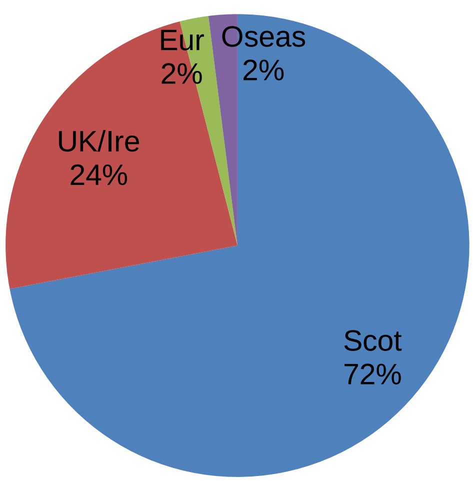
Respondents on business[6] were much more likely to be male than female and nearly three-quarters were making a repeat visit to Orkney.

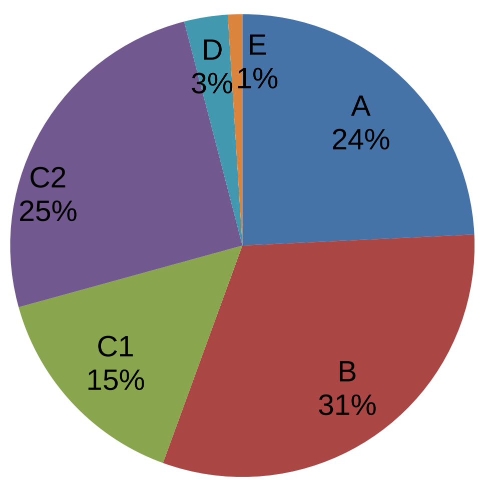


Almost half of business respondents (49%) were aged between 35 and 54.




Nearly three-quarters of business respondents (72%) were from Scotland with a quarter from the UK or Ireland. Over half of business respondents (55%) occupied social grades A and B, with a quarter classified as C2, for instance, those working in oil & gas and construction.



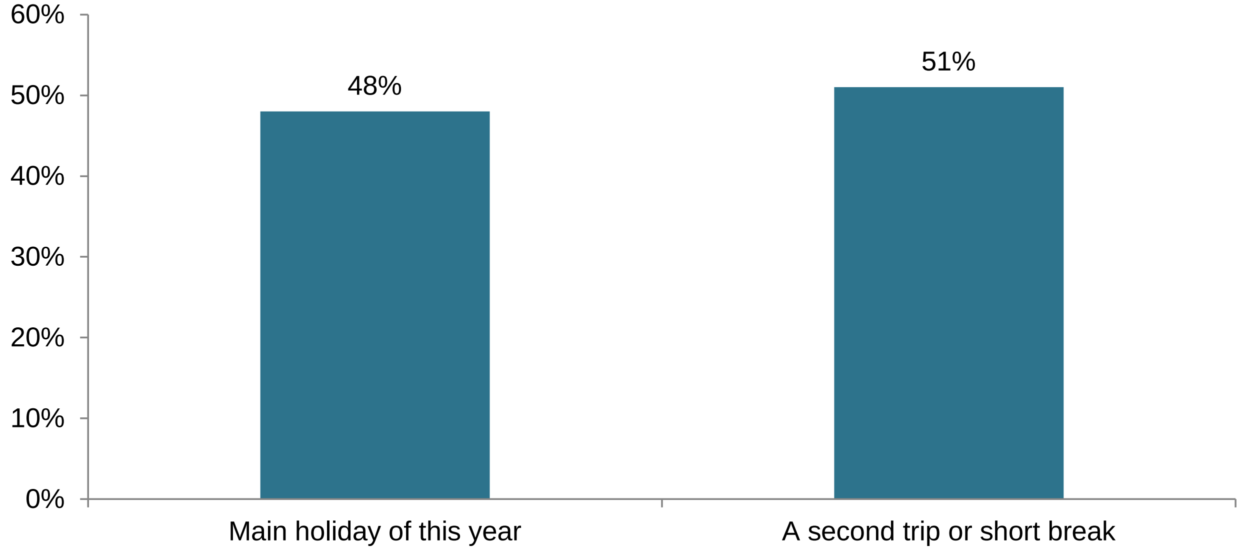




[6] Gender/Age based on 450 visitors. Frequency/Residence/Social grade based on 326 respondents.

### 5.3 Overnight Visits

Respondents who were on an overnight visit described as a holiday/short break or VFR were asked whether the visit was their main holiday for the year or a second holiday/short break. Chart 5.3 shows that overnight holiday/VFR visits were almost equally likely to be main holidays or second breaks. It is encouraging that nearly half of these visits were regarded as main holidays.

**Chart 5.3: Type of visit – by overnight holiday/VFR**
**Base: face-to-face respondents staying overnight on holiday or VFR (853)**




### 5.4 Business Visits

Respondents who were on a business trip (overnight or day trip) were asked about the industry that they worked in. Oil and gas (11%) and building/construction (10%) accounted for a fifth of respondents, though a wide range of industries were highlighted.

**Table 5.6: Profile of respondents – Industry worked in**
**Base: face-to-face respondents on a business visit - day trip or overnight (355)**

| | % |
|---|---|
| Oil and gas | 11 |
| Building/Construction | 10 |
| Renewable energy | 8 |
| Health services | 6 |
| Retail sales/service | 5 |
| Industrial manufacturing | 4 |
| Engineering | 3 |
| Government/local government | 3 |
| Agriculture | 3 |
| Transport - shipping etc. | 2 |
| Water | 2 |
| Marine | 2 |
| Tourism | 2 |
| Archaeology | 1 |

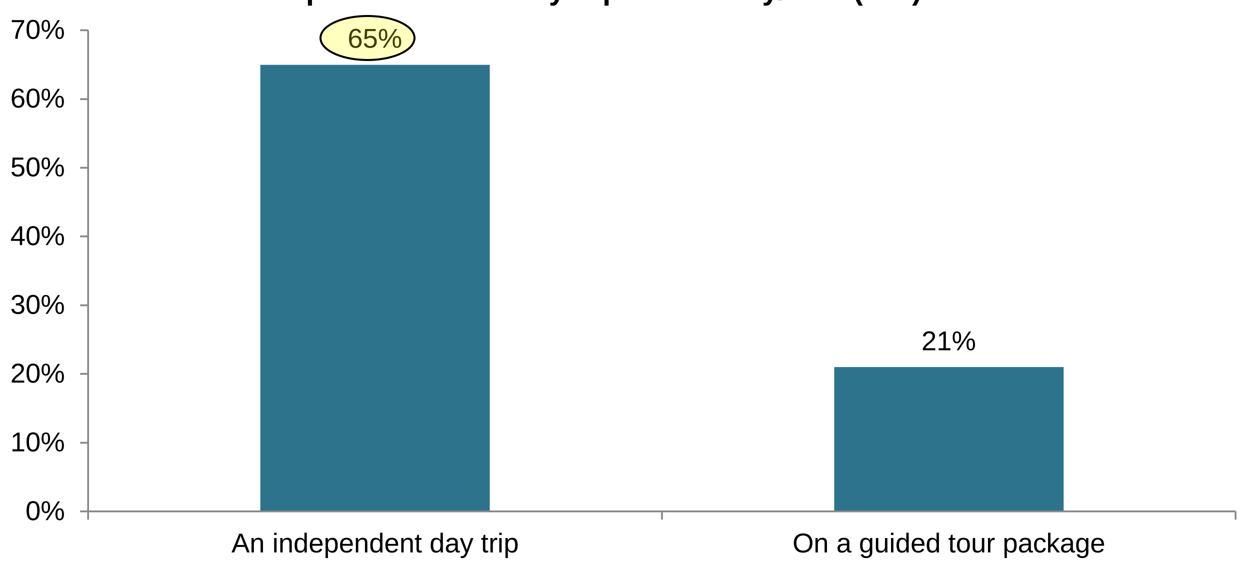
**Table 5.6: Profile of respondents – Industry worked in *(Continued)***
**Base: face-to-face respondents on a business visit - day trip or overnight (355)**

| | |
|---|---|
| Electrical | 1 |
| Financial services | 1 |
| Aquaculture | 1 |
| Church | 1 |
| IT | 1 |
| Media | 1 |
| Fire service | 1 |
| Food/drink manufacture | 1 |
| Security | 1 |
| Sport and Leisure | 1 |
| Telecoms | 1 |
| TV/Film | 1 |
| Other | 25 |

### 5.5 Day Trip Visits

Respondents who were on a day trip described as a holiday or VFR were asked whether this was part of a guided tour package or an independent day trip. For the majority of respondents the visit was the latter (65%). Almost all independent days trips were by ferry with day trips from Gills Bay, John O' Groats and Scrabster all common.

**Chart 5.4: Type of visit – by day trip holiday/VFR**
**Base: face-to-face respondents on a day trip for holiday/VFR (116)**



## 5.6 Length of Visit

*5.6.1 Length of visit – 2013*

The average length of stay on Orkney was 5.7[7] nights with a further 4.1 nights spent elsewhere in Scotland and an average of 11.0 nights in total spent away from home. There are some notable variations by visit type with holiday and VFR respondents spending longer away from home overall than business respondents. This is largely because business respondents do not generally spend time elsewhere in Scotland.

**Table 5.7: Average no. nights away from home – total and by visit type**
**Base: all face-to-face respondents (1,328)**

| | Total | Holiday | VFR | Business |
|---|---|---|---|---|
| On Orkney | 5.7 | 4.7 | 7.9 | 6.2 |
| Elsewhere in Scotland | 4.1 | 5.9 | 2.9 | 0.8 |
| Total trip away from home | 11.0 | 12.5 | 11.4 | 7.1 |

*5.6.2 Length of visit - comparison with previous visitor surveys*

The average length of trip had increased from 10 nights in 2009 to 11 nights in 2013. The number of nights spent on Orkney increased by 1.3 and the number of nights spent elsewhere in Scotland had increased by the same amount. The time spent by visitors outside Scotland had, however, dropped: this is due to the increase in business visitors who are unlikely to spend nights away from home outside Scotland.

**Table 5.8: Average no. of nights away from home - comparison with previous visitor surveys**
**Base: all respondents**

| | 2013 | 2009 |
|---|---|---|
| | no of nights | no of nights |
| On Orkney | 5.7 | 4.4 |
| Elsewhere in Scotland | 4.1 | 2.8 |
| Other | 1.2 | 2.8 |
| **Total trip away from home** | **11.0** | **10.0** |

The number of nights spent on Orkney is highest for VFR and business trips, and both have increased since 2009. Holiday visitors to Orkney were likely to stay an average of 4.7 nights in both 2009 and 2013 showing that their length of stay has not changed.

**Table 5.9: Average no. of nights on Orkney - comparison with previous visitor surveys**

| | 2013 | 2009 |
|---|---|---|
| | no of nights | no of nights |
| Holiday | 4.7 | 4.7 |
| VFR | 7.9 | 5.7 |
| Business | 6.2 | 3.7 |

[7] Figure differs from that shown in section 3 as it has not been weighted for volume and value calculations

## 5.7 Areas Visited

*5.7.1 Areas visited – 2013*

Kirkwall was the area that most respondents had visited, followed by Stromness and West Mainland. Kirkwall was more likely to be visited by respondents on holiday or business compared to VFR. Stromness and West Mainland were also more likely to be visited by respondents on holiday as opposed to those on business or VFR.

**Table 5.10: Average nights away from home – by area visited**
**Base: all face-to-face respondents (1,328)**

| | Visited % | Stayed % |
|---|---|---|
| Kirkwall | 71 | 47 |
| Stromness | 45 | 19 |
| West Mainland (excluding Stromness) | 41 | 18 |
| East Mainland (excluding Kirkwall) | 24 | 5 |
| Burray/South Ronaldsay | 18 | 6 |
| Hoy | 8 | 3 |
| Westray | 4 | 3 |
| Sanday | 3 | 2 |
| Rousay | 3 | 1 |
| Flotta | 3 | 2 |
| North Ronaldsay | 2 | 2 |
| Eday | 2 | 2 |
| Papa Westray | 2 | 1 |
| Stronsay | 1 | 1 |
| Shapinsay | 1 | * |
| Wyre | * | * |
| Egilsay | * | * |
| Graemsay | * | - |

Note: some samples were too small to generate an average no. of nights.

*5.7.2 Areas visited – comparison with previous visitor surveys*

The average nights stayed in the three most popular areas, Kirkwall, Stromness and West Mainland, had increased since 2009. The highest increase was for Kirkwall, reflecting its popularity for business visitors.

**Table 5.11: Average no. of nights by area - comparison with previous visitor surveys**

| | 2013 | 2009 |
|---|---|---|
| | no of nights | no of nights |
| Kirkwall | 2.3 | 1.7 |
| Stromness | 1.0 | 0.7 |
| West Mainland | 1.0 | 0.9 |

Kirkwall remains the most popular area for visitors, followed by Stromness and West Mainland. The results suggest a decrease in the proportion of visits to all areas: the reasons for this are not clear as the questions were virtually identical and visitors were shown a map of Orkney in both surveys.

**Table 5.12: Areas visited (by more than 5% of visitors)**
**Base: all respondents**

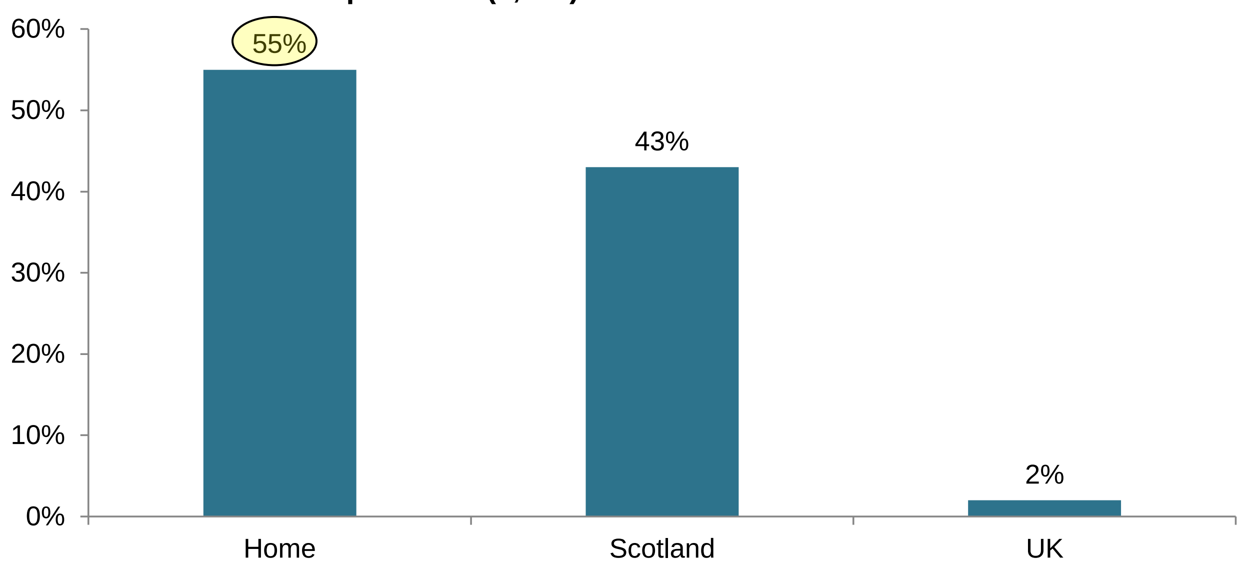
| | 2013 | 2009 |
|---|---|---|
| No of respondents | 1328 | 1149 |
| | % | % |
| Kirkwall | 71 | 78 |
| Stromness | 45 | 64 |
| West Mainland | 41 | 62 |
| East Mainland | 24 | 44 |
| Burray | 18* | 23 |
| South Ronaldsay | | 28 |
| Hoy | 8 | 12 |

*Burray/South Ronaldsay grouped in 2009 research

### 5.8 Post Visit Destination

At the end of their visit, over half of respondents were travelling home, with business (81%) and VFR (71%) respondents more likely to do so than respondents on holiday (38%). In contrast, respondents on holiday were much more likely to be travelling elsewhere in Scotland (59%) compared to 28% of VFR and 16% of business.

**Chart 5.5: Post visit destination**
**Base: all face-to-face respondents (1,328)**



### 5.9 Type of Visit – Island Comparisons

Viewed by type of visit the results show some similarities across the three locations:

- Visitors on holiday were almost equally likely to be male or female and tended to be aged 45+
- Those on VFR trips were slightly more likely to be female than male on Orkney and the Outer Hebrides and significantly more likely to be female than male on Shetland. On Orkney VFR visitors tended to be older (66% aged 45+) whereas on the Outer Hebrides and Shetland VFR visitors displayed a wider range of ages
- Business visitors were significantly more likely to be male than female on all three locations, with the difference in Orkney and Shetland most pronounced. As one might expect business visitors tended to be aged between 25-64, for instance, 64% on Shetland

**Table 5.13: Profile of visitor types (1)**
**Base: all visitors**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % |
| **Gender** | | | | | | | | | | | |
| Female | 50 | 52 | 16 | | 48 | 53 | 26 | | 48 | 58 | 19 |
| Male | 50 | 48 | 84 | | 52 | 47 | 74 | | 52 | 42 | 81 |
| | | | | | | | | | | | |
| **Age** | | | | | | | | | | | |
| Under 16 | 8 | 9 | 1 | | 11 | 15 | 2 | | 3 | 7 | * |
| 16-24 | 5 | 5 | 7 | | 6 | 8 | 4 | | 13 | 14 | 9 |
| 25-34 | 9 | 9 | 20 | | 10 | 12 | 17 | | 13 | 10 | 22 |
| 35-44 | 11 | 11 | 24 | | 11 | 14 | 22 | | 9 | 10 | 19 |
| 45-54 | 16 | 17 | 25 | | 20 | 15 | 29 | | 14 | 16 | 28 |
| 55-64 | 23 | 21 | 19 | | 20 | 16 | 17 | | 17 | 17 | 17 |
| 65+ | 27 | 28 | 4 | | 21 | 20 | 10 | | 30 | 25 | 5 |

Additional analysis of residence, social grade and frequency by island location shows that:

- Holiday visitors were most likely to be Scottish on the Outer Hebrides compared to Orkney or Shetland, whilst Orkney had the highest proportion of visitors from Europe and the rest of the world. The social grade of holiday visitors was similar across the three locations with most from the ABC1 groups, though Shetland had significantly fewer A's than the other two islands. Holiday visitors to Orkney and Shetland were equally likely to be making their first visit, whilst nearly half of visitors to the Outer Hebrides were making a repeat visit.
- VFR visitors were most likely to be Scottish in the Outer Hebrides (70%) compared to Shetland (56%) and Orkney (49%). VFR social grade was similar to that of holiday visitors but once again Shetland had significantly fewer A social grade visitors. The vast majority of VFR visitors on the Outer Hebrides were making a repeat visit (91%) compared to Shetland (78%) and Orkney (68%)
- Business visitors were most likely to be Scottish on the Outer Hebrides (81%) compared to Orkney (72%) and Shetland (60%). As before the social grade was similar but Shetland business visitors were less likely to occupy the A group. On all three locations a similar proportion of business visitors were on a repeat visit (between 69-76%)

**Table 5.14: Profile of visitor types (2)**
**Base: all respondents**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Holiday %** | **VFR %** | **Business %** | | **Holiday %** | **VFR %** | **Business %** | | **Holiday %** | **VFR %** | **Business %** |
| **Residence** | | | | | | | | | | | |
| Scotland | 29 | 49 | 72 | | 43 | 70 | 81 | | 28 | 56 | 60 |
| Rest of UK/Ire | 33 | 36 | 24 | | 38 | 21 | 17 | | 40 | 31 | 28 |
| Europe | 22 | 8 | 2 | | 14 | 2 | 1 | | 17 | 7 | 8 |
| Rest of world | 15 | 8 | 2 | | 5 | 5 | 1 | | 14 | 6 | 3 |
| | | | | | | | | | | | |
| **Social grade** | | | | | | | | | | | |
| A | 35 | 28 | 24 | | 33 | 20 | 23 | | 17 | 14 | 19 |
| B | 30 | 32 | 31 | | 33 | 35 | 31 | | 38 | 32 | 27 |
| C1 | 20 | 23 | 15 | | 17 | 24 | 19 | | 26 | 29 | 23 |
| C2 | 9 | 8 | 25 | | 12 | 13 | 24 | | 9 | 11 | 25 |
| D | 3 | 3 | 3 | | 3 | 3 | 2 | | 2 | 6 | 4 |
| E | 2 | 2 | 1 | | 1 | 3 | * | | 2 | 4 | 1 |
| | | | | | | | | | | | |
| **Frequency** | | | | | | | | | | | |
| This is my first visit | 63 | 32 | 28 | | 53 | 9 | 23 | | 60 | 21 | 32 |
| Repeat visit/lived on island | 37 | 68 | 72 | | 48 | 91 | 76 | | 40 | 78 | 69 |

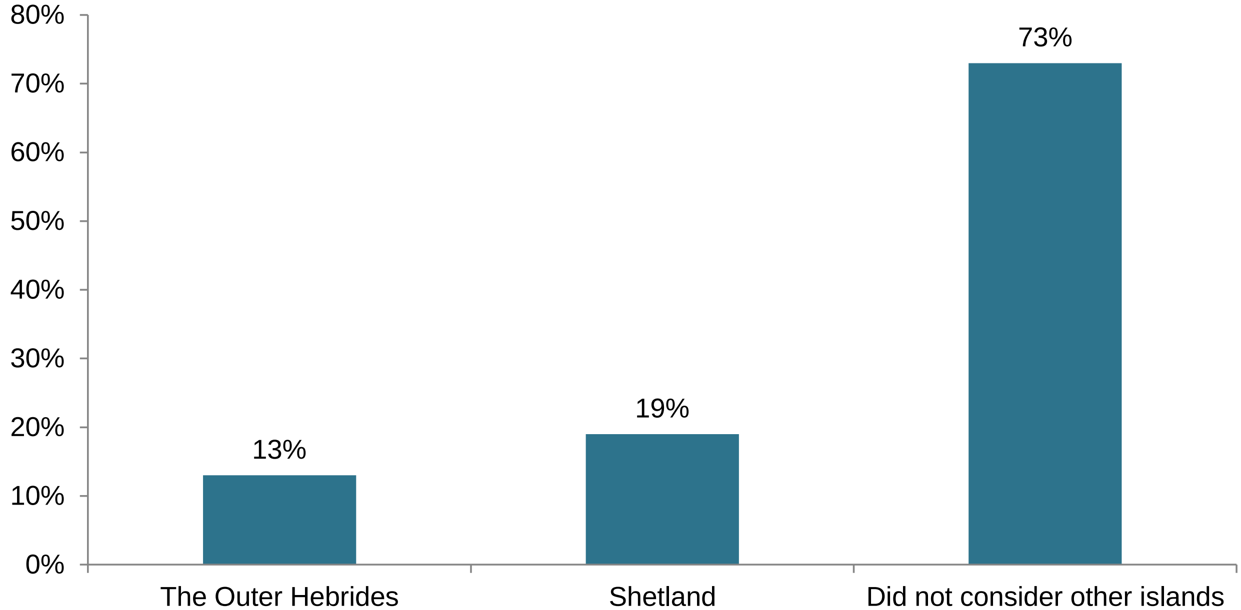
## 6. PLANNING THE VISIT

### 6.1 Other Islands Considered

Most respondents (73%) did not consider either Shetland or the Outer Hebrides before choosing to visit Orkney.  Almost a fifth (holiday and VFR) had considered a visit to Shetland whilst 13% thought about visiting the Outer Hebrides. The result for Shetland is perhaps understandable given the geographic proximity of the two island groups but the fact that over one in ten respondents considered the Outer Hebrides is interesting given its distance from Orkney.

Perhaps unsurprisingly it was those on holiday that were most likely to consider an alternative destination, with 20% considering Shetland and 16% the Outer Hebrides.

**Chart 6.1: Other islands considered**
**Base: online respondents on holiday or VFR (689)**




Respondents from Europe and the rest of the world were most likely to consider an alternative destination, with some having thought about visiting both Shetland and the Outer Hebrides (hence the percentages for these types of respondent adding up to more than 100% in the table below).

**Table 6.1: Other islands considered – by respondent residence**
**Base: online respondents on holiday or VFR (689)**

| | Scotland % | UK/Ire % | Europe % | RoW % |
|---|---|---|---|---|
| The Outer Hebrides | 10 | 10 | 25 | 18 |
| Shetland | 12 | 20 | 20 | 27 |
| Did not consider other islands | 80 | 74 | 65 | 65 |

### 6.2 Influences on Visit

Over half of respondents (holiday or VFR) highlighted that an interest in archaeology and history had influenced their decision to visit Orkney, while slightly fewer (46%) had indicated that scenery and landscape was also an important factor.

**Table 6.2: Influences on visit**
**Base: online respondents on holiday or VFR (689)**

| | % |
|---|---|
| Interest in the archaeology/history | 51 |
| Interest in scenery/landscape | 46 |
| Experience of previous visit/know area | 31 |
| Recommendation from friend/relative | 24 |
| Family connections with the area | 18 |
| Internet/website | 18 |
| Interest in particular attractions | 15 |
| Guide books | 14 |
| Tourist Brochure | 11 |
| Specific activities such as walking or golf | 10 |
| To undertake particular activities | 9 |
| Radio or TV programme about Orkney | 6 |
| Particular events/festivals | 4 |
| Newspaper or magazine article | 3 |
| To stay in particular accommodation | 3 |
| A film/movie or book featuring the area | 3 |
| Social media (Facebook/Twitter) | 1 |
| Newspaper or magazine advertisement | * |
| Radio/TV advertisement about Orkney | * |
| Don't know/can't remember | * |
| Other reason | 8 |

Table 6.3 displays how the main influences on the decision to visit vary by respondent residence with an interest in archaeology/history being an important factor for all groups, but especially to those from the rest of the world (70%). Scenery/landscape also had broad appeal, but was a stronger attraction to those respondents from Europe and beyond. Experience of previous visits was most important to Scottish residents (who are more likely to have visited before) whilst the influence of recommendations is clear for all respondents, regardless of residence.

**Table 6.3: Influences on visit – by respondent residence**
**Base: online respondents on holiday or VFR (689)**

| | Scotland % | UK/Ire % | Europe % | RoW % |
|---|---|---|---|---|
| Interest in the archaeology/history | 44 | 49 | 46 | 70 |
| Interest in scenery/landscape | 39 | 43 | 57 | 59 |
| Experience of previous visit/know area | 42 | 33 | 18 | 16 |
| Recommendation from friend/relative | 24 | 24 | 20 | 27 |

### 6.3 Timing of Trip Planning

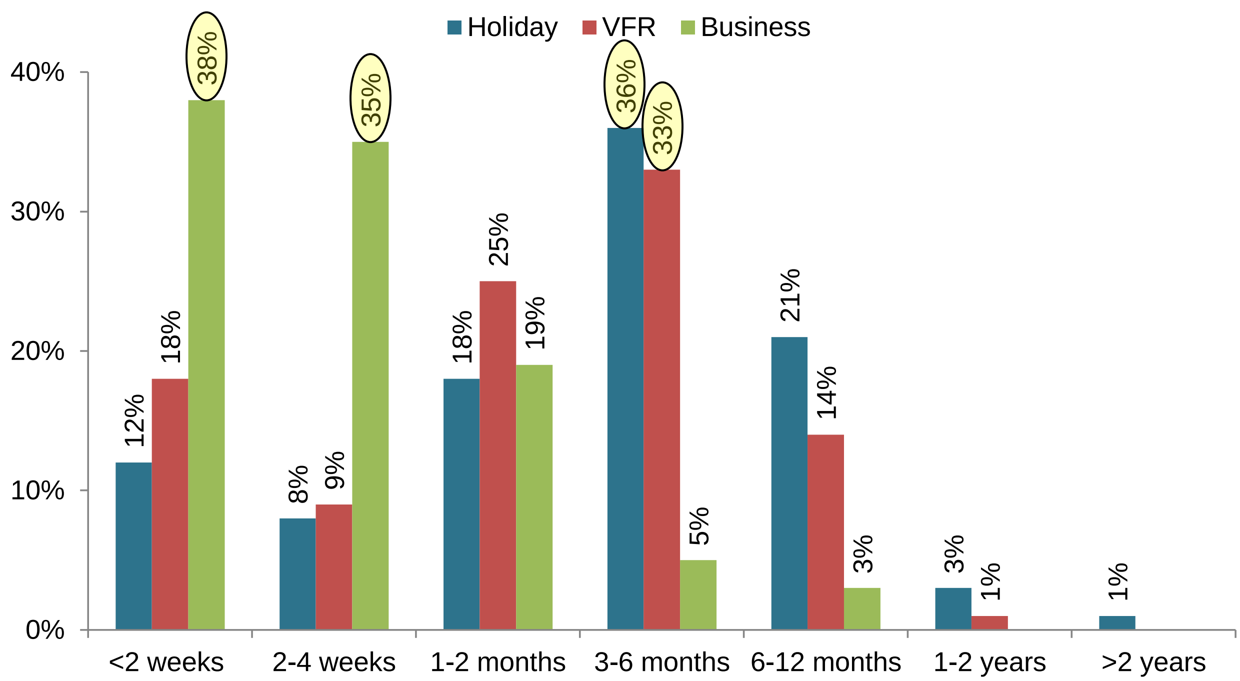
Overall, respondents displayed a variety of approaches to the planning of their trip. Over half (52%) planned at least three months in advance whilst over a quarter (28%) planned less than 4 weeks before their visit.

**Table 6.4: Timing of trip planning**
**Base: all online respondents (821)**

| | % |
|---|---|
| Less than 2 weeks | 16 |
| 2-4 weeks | 12 |
| 1-2 months | 19 |
| 3-6 months | 30 |
| 6-12 months | 19 |
| 1-2 years | 2 |
| More than 2 years | 1 |

There are some obvious differences between type of respondent and planning of trips, as displayed in chart 6.2. Holiday and VFR respondents were most likely to begin planning their trip 3-6 months in advance and in general displayed a similar approach to planning their trips. In contrast, business respondents were much more likely to plan their trip at short notice, with nearly three-quarters planning their trip within 4 weeks of their visit.

**Chart 6.2: Timing of trip planning**
**Base: all online respondents (821)**



*6.3.1 Timing of trip planning – domestic vs international*

The table below highlights the timing of trip planning for domestic (Scotland, UK/Ireland) and international (Europe/RoW) holiday respondents. The results were quite consistent with respondents most likely to plan their trip between 3-6 months in advance.

**Table 6.5: Timing of trip planning – domestic vs international**
**Base = holiday respondents (523)**

| | Scotland UK/Ireland | Europe/ RoW |
|---|---|---|
| No of respondents | 350 | 173 |
| | % | % |
| Less than 2 weeks | 12 | 14 |
| 2-4 weeks | 10 | 5 |
| 1-2 months | 18 | 17 |
| 3-6 months | 36 | 34 |
| 6-12 months | 19 | 25 |
| 1-2 years | 3 | 4 |
| More than 2 years | 1 | 1 |

### 6.4 Timing of Trip Booking

As with trip planning, there was little consistency evident in the timing of trip bookings with just over a third (36%) booking in the month before and almost a fifth (19%) booking less than 2 weeks in advance. Also of note, almost a tenth of respondents did not book in advance at all. In contrast, nearly two fifths (38%) booked more than three months in advance.

By accommodation type it is interesting to note that respondents booking 4 weeks or less before their visit were more likely to be staying in hotels (48%) or guest house/B&Bs (36%) compared to self-catering (10%). Those booking self-catering were much more likely to book at least three months in advance (73%) compared to those booking guest house/B&Bs (30%) or hotels (27%).

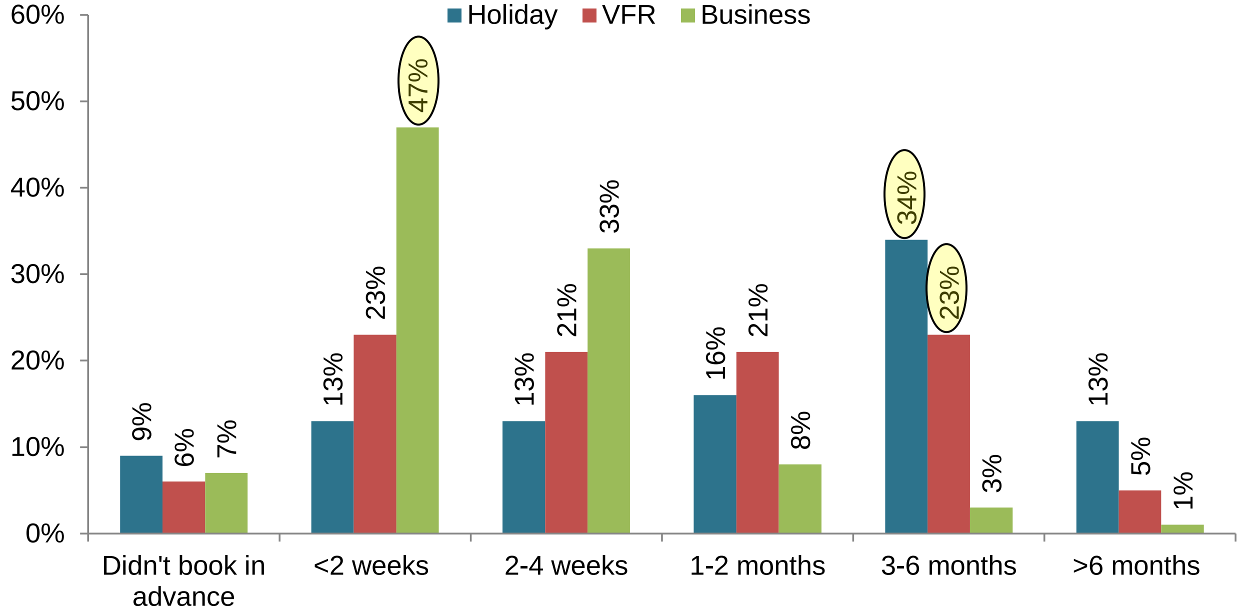
**Table 6.6: Timing of trip booking**
**Base: all online respondents (821)**

| | % |
|---|---|
| Didn't book in advance | 9 |
| Less than 2 weeks | 19 |
| 2-4 weeks | 17 |
| 1-2 months | 16 |
| 3-6 months | 27 |
| Over 6 months | 11 |

Again, in line with trip planning, holiday and VFR respondents displayed similar approaches to booking, with both most likely to book 3-6 months in advance. Business respondents acted very differently, with almost half making their trip booking just 2 weeks (or less) before travelling.

Of note, a similar percentage of holiday, VFR and business respondents did not book in advance at all.

**Chart 6.3: Timing of trip booking**
**Base: all online respondents (821)**




*6.4.1 Timing of trip booking – domestic vs international*

The table below highlights the timing of trip booking for domestic (Scotland, UK/Ireland) and international (Europe/RoW) holiday respondents. The results were quite consistent though domestic respondents were more likely to book their trip within four weeks of arriving (29%) compared to international respondents (21%).

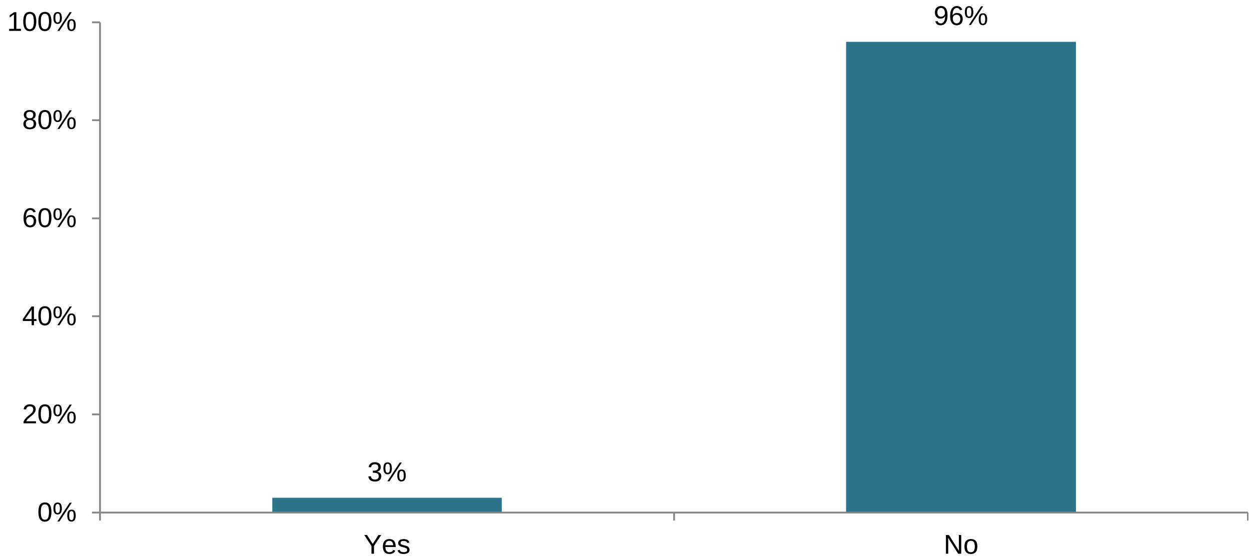
**Table 6.7: Timing of trip booking – domestic vs international**
**Base = holiday respondents (523)**

| | **Scotland UK/Ireland** | **Europe/ RoW** |
|---|---|---|
| No of respondents | 350 | 173 |
| | % | % |
| Didn't book in advance | 7 | 15 |
| Less than 2 weeks | 14 | 12 |
| 2-4 weeks | 15 | 9 |
| 1-2 months | 14 | 20 |
| 3-6 months | 36 | 29 |
| Over 6 months | 13 | 13 |

### 6.5 Satisfaction with Travel Planning

The vast majority of respondents encountered no issues when booking their transport.

**Chart 6.4: Issues when booking transport**
**Base: all face-to-face respondents (1,328)**




For the small percentage of respondents who did have issues when booking travel to Orkney the main issues were expensive flights or a lack of ferries at preferred times or on preferred routes.

**Table 6.8: Issues when booking travel to Orkney**
**Base: respondents who had issues when booking travel to Orkney (44)**

| | **%** |
|---|---|
| My first choice of transport type was unavailable | 5 |
| | |
| No ferries at times/days I wanted | 14 |
| The ferries I wanted were too expensive | - |
| The ferries I wanted were fully booked | - |
| No ferries on preferred route | 14 |
| | |
| No flights at times/days I wanted | - |
| The flights I wanted were too expensive | 16 |
| The flights I wanted were fully booked | 2 |
| No flights on preferred route | 2 |
| | |
| Other | 64 |

'Other' issues were mainly difficulties in planning linked to connections and issues with online bookings.

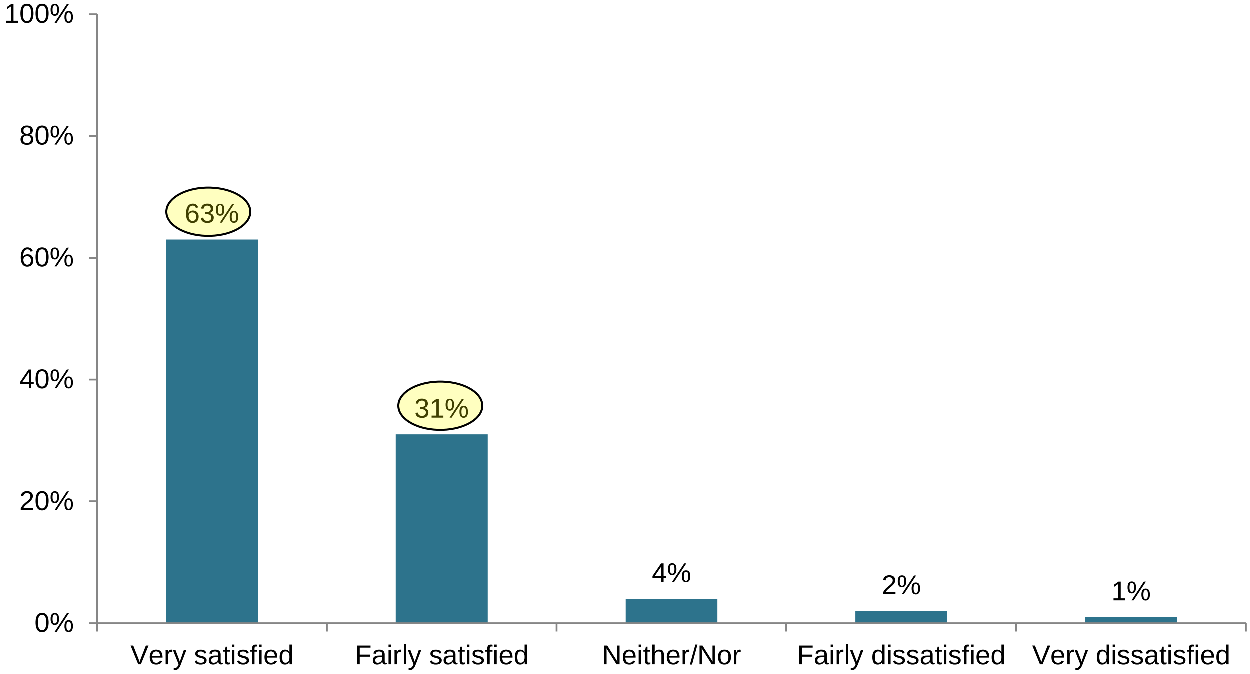
*"Felt waiting times between journeys too long. Need simplified explanations of how to get to Orkney."*

*"Northlink website difficult to use - 'codes' difficult to understand."*

*6.5.1 Getting to Orkney*

The majority of respondents were very or fairly satisfied (94%) with planning getting to Orkney with just a small proportion of respondents showing any dissatisfaction.

**Chart 6.5: Satisfaction with getting to Orkney**
**Base: online respondents who rated getting to Orkney (673)**




Holiday and VFR respondents demonstrated the highest levels of satisfaction with the planning of getting to Orkney. Where dissatisfaction was evident, it was most apparent among VFR and business respondents.

**Table 6.9: Satisfaction with getting to Orkney - total and by type of visit**
**Base: online respondents who rated getting to Orkney (673)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 63 | 64 | 64 | 48 |
| Fairly satisfied | 31 | 30 | 27 | 44 |
| Neither/Nor | 4 | 5 | 3 | 2 |
| Fairly dissatisfied | 2 | 1 | 5 | 3 |
| Very dissatisfied | 1 | 1 | 1 | 3 |
| | | | | |
| Mean score (out of 5) | 4.52 | 4.55 | 4.47 | 4.30 |

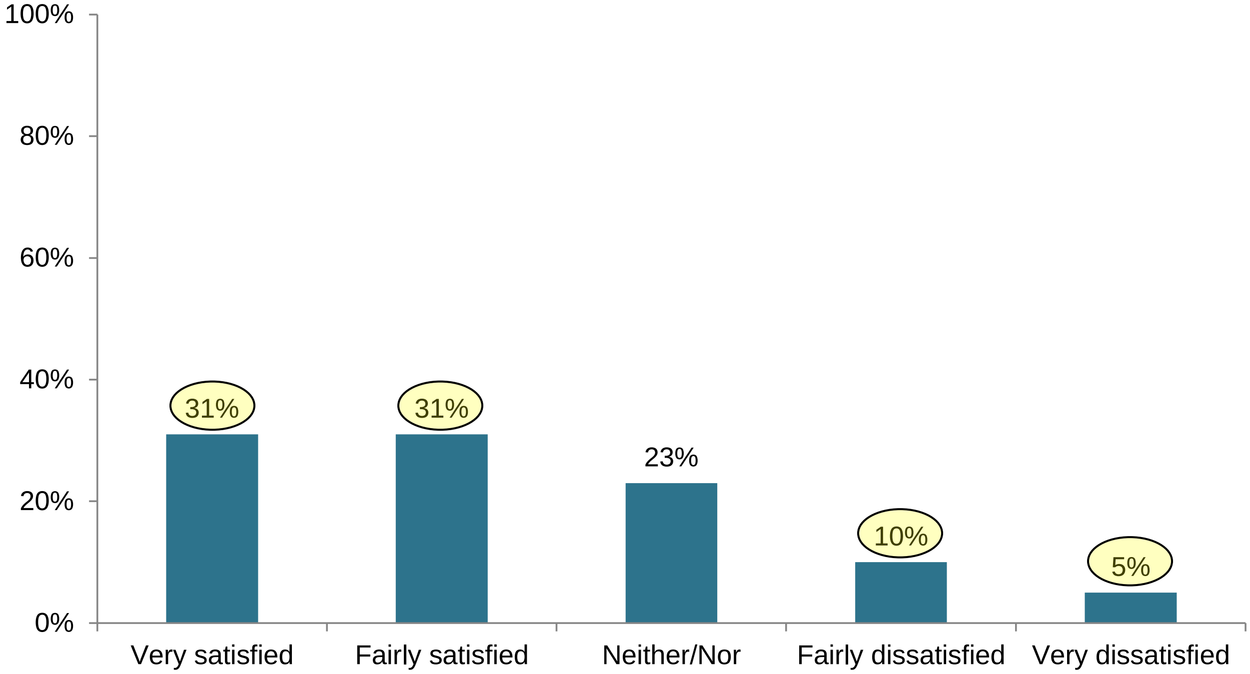
The main reasons for dissatisfaction related to the journey to Orkney from England, with respondents highlighting issues with costs of travel, problems connections between ferries and other transport links and A9 traffic jams. In addition, several respondents commented on poor communication from ferry operators:

*"Ferry was cancelled a day before the trip due to mechanical failure. Left to make own alternative arrangements - not much advice and guidance about this."*

*6.5.2 Availability of convenient air routes*

Just over three-fifths of respondents were very or fairly satisfied with the availability of convenient air routes when planning their travel to Orkney while 15% of respondents were dissatisfied with air route availability.

**Chart 6.6: Satisfaction with availability of convenient air routes**
**Base: online respondents who rated availability of convenient air routes (270)**




Almost a quarter of VFR respondents and a fifth of business respondents were dissatisfied with the availability of convenient air routes. This is reflected in the lower mean score result for this element of their trip planning.

**Table 6.10: Satisfaction with availability of convenient air routes - total and by type of visit**
**Base: online respondents who rated availability of convenient air routes (270)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 31 | 32 | 20 | 33 |
| Fairly satisfied | 31 | 28 | 33 | 42 |
| Neither/Nor | 23 | 29 | 24 | 4 |
| Fairly dissatisfied | 10 | 8 | 20 | 9 |
| Very dissatisfied | 5 | 3 | 4 | 11 |
| | | | | |
| Mean score (out of 5) | 3.74 | 3.78 | 3.43 | 3.78 |

The cost of flights and lack of direct flights to Orkney were the key reasons for dissatisfaction with air routes:

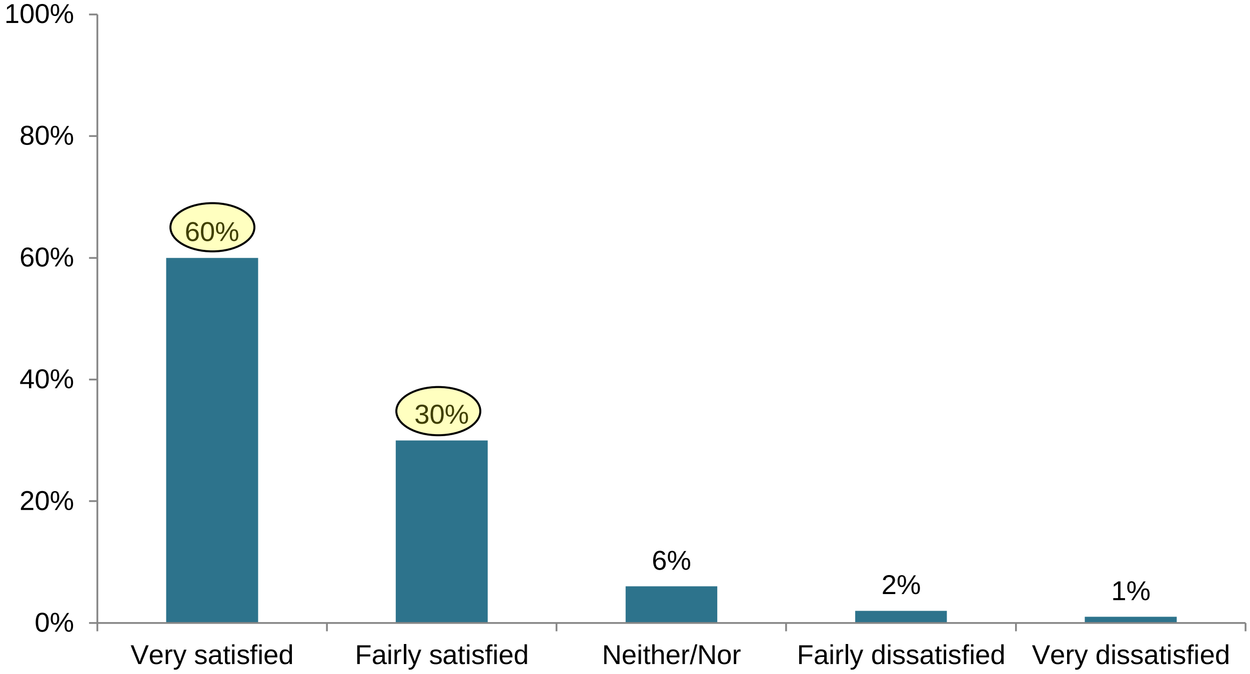
*"Expensive, no direct flights between Orkney and England."*

*"There is no straight route to Orkney from London. Lots of stops in Aberdeen."*

*6.5.3 Availability of convenient sea routes*

Satisfaction with the availability of sea routes when planning trips to Orkney was high with 90% of respondents either very or fairly satisfied. Dissatisfaction levels were low.

**Chart 6.7: Satisfaction with availability of convenient sea routes**
**Base: online respondents who rated availability of convenient sea routes (649)**




Holiday respondents were most satisfied with the availability of convenient sea routes although VFR and business respondents also displayed high levels of satisfaction overall.

**Table 6.11: Satisfaction with availability of convenient sea routes - total & by type of visit**
**Base: online respondents who rated availability of convenient sea routes (649)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 60 | 62 | 57 | 50 |
| Fairly satisfied | 30 | 30 | 31 | 36 |
| Neither/Nor | 6 | 6 | 8 | 9 |
| Fairly dissatisfied | 2 | 2 | 1 | - |
| Very dissatisfied | 1 | 1 | 3 | 5 |
| | | | | |
| Mean score (out of 5) | 4.46 | 4.50 | 4.39 | 4.26 |

The main reason for dissatisfaction with sea routes was the 'inconvenient' ferry times, mainly relating to the Kirkwall-Aberdeen ferry.

*"Aberdeen to Kirkwall has a very inconvenient arrival time."*

*"Northlink have stopped midday ferries. Very inconvenient for us."*

## 6.6 Planning the Visit – Island Comparisons

An interest in scenery and landscape was a strong influence for respondents on all three locations but archaeology/history was the strongest influence on visits for Orkney respondents.

**Table 6.12: Influences on visit**
**Base: online respondents on holiday or VFR**

| | Orkney % | Outer Hebrides % | Shetland % |
|---|---|---|---|
| Interest in scenery/landscape | 46 | 50 | 43 |
| Experience of previous visit | 31 | 39 | 25 |
| Interest in the archaeology/history | 51 | 21 | 22 |
| Family connections with the area | 18 | 25 | 21 |
| Recommendation - friend/relative | 24 | 19 | 16 |
| Internet/website | 18 | 15 | 16 |
| Specific activities e.g. walking/golf | 10 | 15 | 12 |
| Guide books | 14 | 10 | 9 |
| To undertake particular activities | 9 | 10 | 12 |
| Interest in particular attractions | 15 | 8 | 5 |
| Tourist Brochure | 11 | 7 | 7 |
| Particular events/festivals | 4 | 2 | 13 |
| Radio/TV programme about… | * | 7 | 6 |
| Particular accommodation | 3 | 6 | * |
| A film/movie/book featuring area | 3 | 4 | 2 |
| Newspaper or magazine article | 3 | 3 | 2 |
| Social media (Facebook/Twitter) | 1 | * | 3 |
| Newspaper/magazine advert | * | 1 | 2 |
| Interest in geology | - | - | 2 |
| Radio/TV advert about …. | * | * | - |
| Other reason | 8 | 7 | 14 |

Approaches to trip planning and booking on the three locations highlight the following:

- In all three locations around a third of holiday and VFR respondents started to plan their trips 3-6 months in advance, although VFR respondents on the Outer Hebrides displayed a variety of approaches to trip planning. There was a sharp contrast between holiday/VFR and business respondents with the latter in all three locations likely to leave their trip planning to within 4 weeks of their visit.
- Holiday respondents in all three locations booked their visits further in advance than VFR or business respondents. As with planning, it was business respondents who booked latest, with the majority of business respondents on all locations leaving trip booking to within 4 weeks of their trip.

**Table 6.13: Timing of trip planning & booking**
**Base: all online respondents**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Holiday %** | **VFR %** | **Business %** | | **Holiday %** | **VFR %** | **Business %** | | **Holiday %** | **VFR %** | **Business %** |
| **Timing of planning** | | | | | | | | | | | |
| Less than 2 weeks | 12 | 18 | 38 | | 9 | 23 | 46 | | 6 | 19 | 35 |
| 2-4 weeks | 8 | 9 | 35 | | 11 | 22 | 27 | | 8 | 6 | 32 |
| 1-2 months | 18 | 25 | 19 | | 22 | 25 | 18 | | 18 | 29 | 18 |
| 3-6 months | 36 | 33 | 5 | | 36 | 23 | 8 | | 37 | 35 | 8 |
| 6-12 months | 21 | 14 | 3 | | 19 | 5 | 1 | | 24 | 8 | 1 |
| 1-2 years | 3 | 1 | - | | 2 | 1 | - | | 4 | - | - |
| More than 2 years | 1 | - | - | | 1 | 1 | - | | 2 | - | - |
| | | | | | | | | | | | |
| **Timing of booking** | | | | | | | | | | | |
| Didn't book in advance | 9 | 6 | 7 | | 9 | 7 | 7 | | 4 | 8 | 12 |
| Less than 2 weeks | 13 | 23 | 47 | | 14 | 30 | 55 | | 9 | 16 | 39 |
| 2-4 weeks | 13 | 21 | 33 | | 15 | 22 | 23 | | 9 | 13 | 32 |
| 1-2 months | 16 | 21 | 8 | | 20 | 26 | 12 | | 21 | 39 | 9 |
| 3-6 months | 34 | 23 | 8 | | 30 | 10 | 2 | | 40 | 23 | 2 |
| Over 6 months | 13 | 5 | 1 | | 11 | 4 | - | | 15 | 2 | 1 |

A comparison with mean scores on satisfaction with travel planning highlights the following:

- Holiday respondents on each location were most satisfied with getting to the island, whilst VFR and business respondents on Shetland were least satisfied
- On all three locations respondents displayed higher satisfaction with sea routes than air routes, with business respondents displaying the highest levels of satisfaction with air routes on all three locations. In contrast, holiday respondents were most likely to be most satisfied with sea routes on all three locations. The issues causing dissatisfaction were similar on all three island groups with cost and availability featuring most commonly.

**Table 6.14: Satisfaction with travel planning**
**Base: online respondents who rated travel planning**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Holiday** | **VFR** | **Business** | | **Holiday** | **VFR** | **Business** | | **Holiday** | **VFR** | **Business** |
| | Mean score (out of 5) | | | | Mean score (out of 5) | | | | Mean score (out of 5) | | |
| Satisfaction with getting to … | 4.55 | 4.47 | 4.30 | | 4.67 | 4.38 | 4.36 | | 4.60 | 3.94 | 4.04 |
| Satisfaction with availability of convenient air routes | 3.78 | 3.43 | 3.78 | | 3.50 | 3.40 | 4.00 | | 3.80 | 3.49 | 3.85 |
| Satisfaction with availability of convenient sea routes | 4.50 | 4.39 | 4.26 | | 4.55 | 4.28 | 4.24 | | 4.36 | 4.05 | 4.05 |

# 7. SOURCES OF INFORMATION

## 7.1 Sources of Information (pre-visit)

*7.1.1 Sources of information pre-visit - 2013*

The internet/websites were the most common source of pre-visit information for respondents, with nearly three-quarters using this source. For around a third of respondents, brochures/leaflets, advice from friends/relatives/others, and guidebooks were also important.

- Respondents on holiday (83%) were more likely than VFR and business respondents (both 51%) to refer to the internet/websites
- Similarly, holiday respondents were more likely than VFR and business respondents to use brochures/leaflets, guidebooks and visitor information centres
- VFR respondents (71%) were much more likely than holiday (33%) and business respondents (24%) to speak to friends/relatives/others as a source of information
- Guidebooks were used by 45% of holiday respondents, compared to 23% of respondents VFR and just 3% of business respondents

**Table 7.1: Sources of information (pre-visit) - total and by type of visit**
**Base: all online respondents (821)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Internet/websites | 72 | 83 | 51 | 51 |
| Brochures/leaflets | 37 | 46 | 20 | 10 |
| Friends/relatives/advice from others | 37 | 33 | 71 | 24 |
| Guidebooks | 34 | 45 | 23 | 3 |
| Visitor Information Centre | 15 | 18 | 9 | 4 |
| Travel operators (ferries, airlines) | 11 | 12 | 8 | 8 |
| Social media (Facebook/Twitter) | 3 | 3 | 5 | 3 |
| Travel Agent | 2 | 2 | 1 | 3 |
| None | 10 | 4 | 14 | 31 |

Viewed by respondents' residence, the main difference in sources of information was that respondents from overseas (Europe, rest of world) were more likely than Scottish and UK/Irish respondents to use the internet/websites and guidebooks.

**Table 7.2: Sources of information (pre-visit) – by respondent residence**
**Base: all online respondents (821)**

| | Scotland % | UK/Ire % | Europe % | RoW % |
|---|---|---|---|---|
| Internet/websites | 63 | 73 | 84 | 88 |
| Brochures/leaflets | 31 | 42 | 41 | 38 |
| Friends/relatives/advice from others | 43 | 39 | 16 | 31 |
| Guidebooks | 24 | 35 | 58 | 45 |
| Visitor Information Centre | 11 | 14 | 22 | 21 |
| Travel operators (ferries, airlines) | 9 | 14 | 4 | 12 |
| Social media (Facebook/Twitter) | 4 | 1 | 7 | 2 |
| Travel Agent | 1 | 1 | 5 | 3 |
| None | 15 | 9 | 5 | 2 |

*7.1.2 Sources of information pre-visit - comparison with previous visitor surveys*

The question on pre-visit sources of information was inserted in the online survey in 2013 and the differences in methodology between 2013 and 2009 should be noted.

The Internet remains the most important source of pre-visit information with around 70% of visitors citing it as a source in both surveys.  All other major sources have increased in use since 2009, most notably reference to guidebooks, which has more than doubled in use from 16% in 2009 to 34% in 2013.

**Table 7.3: Sources of information pre-visit – comparison with previous surveys**
**Base: all online respondents - 2013/ all respondents - 2009**

| | 2013 | 2009 |
|---|---|---|
| Number of respondents | 821 | 1149 |
| | % | % |
| Internet/websites | 72 | 70 |
| Brochures/leaflets | 37 | 20 |
| Friends/relatives/advice from others | 37 | 22 |
| Guidebooks | 34 | 16 |
| Visitor Information Centre | 15 | 9 |
| Travel operators (ferries, airlines) | 11 | 8 |
| Social media (Facebook/Twitter) | 3 | n/a |
| Travel Agent | 2 | 3 |
| None | 10 | n/a |

### 7.2 Online Research

Respondents who used the internet as a source highlighted a range of research topics.

- In general, respondents on holiday were more likely to have conducted online research
- Research on transport to/from Orkney was common amongst all respondents, but especially for holiday respondents
- Accommodation was a key research topic for holiday (77%) and business (76%) respondents but not for VFR respondents, many of whom were staying with friends/relatives
- Visitor centres/attractions and history/culture were online research topics for half of holiday respondents

**Table 7.4: Online research topics - total and by type of visit**
**Base: online respondents who used the internet/websites (594)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Transport to destination | 83 | 86 | 80 | 78 |
| Accommodation | 71 | 77 | 35 | 76 |
| Transport from destination | 69 | 71 | 69 | 63 |
| Visitor centres/attractions | 43 | 50 | 27 | 7 |
| History/culture | 43 | 52 | 27 | 4 |
| Natural history | 28 | 32 | 22 | 4 |
| Activities | 28 | 31 | 20 | 17 |
| Festivals/Events | 16 | 17 | 12 | 4 |
| Genealogy/family history | 4 | 4 | 8 | - |

Online research topics did not vary significantly according to respondent residence, though respondents from the rest of the world were more likely than others to research history/culture, natural history and genealogy/family history online and slightly less likely to research visitor centres/attractions.

**Table 7.5: Online research topics – by respondent residence**
**Base: online respondents who used the internet/websites (594)**

| | Scotland % | UK/Ire % | Europe % | RoW % |
|---|---|---|---|---|
| Transport to destination | 83 | 82 | 90 | 82 |
| Accommodation | 73 | 68 | 76 | 69 |
| Transport from destination | 65 | 69 | 76 | 70 |
| Visitor centres/attractions | 46 | 44 | 49 | 34 |
| History/culture | 33 | 41 | 47 | 62 |
| Natural history | 23 | 27 | 31 | 39 |
| Activities | 27 | 23 | 40 | 31 |
| Festivals/Events | 16 | 19 | 16 | 12 |
| Genealogy/family history | 3 | 2 | 1 | 12 |

### 7.3 Online Booking

In line with the most common topics respondents had researched online (see table 7.6), transport to/from Orkney and accommodation were the bookings they were most likely to make via the internet.

- Booking transport to/from Orkney was very common amongst holiday and VFR respondents, though less common for business respondents, many of whom had transport (and accommodation) booked on their behalf
- Transport and accommodation were the only arrangements that a significant proportion of respondents booked online

**Table 7.6: Online booking - total and by type of visit**
**Base: online respondents who used the internet/websites (594)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Transport to destination | 71 | 73 | 82 | 52 |
| Transport from destination | 64 | 67 | 73 | 43 |
| Accommodation | 60 | 67 | 29 | 39 |
| Activities | 4 | 4 | - | 2 |
| Visitor centres/visitor attractions | 3 | 4 | - | - |
| Festival/Event tickets | 2 | 1 | 2 | 2 |
| Other | 2 | 2 | - | 4 |
| None of the above | 17 | 15 | 16 | 26 |

Viewed by respondents' residence the results show that transport and accommodation were the main types of online bookings regardless of where respondents were based.

**Table 7.7: Online booking - by respondent residence**
**Base: online respondents who used the internet/websites (594)**

| | Scotland % | UK/Ire % | Europe % | RoW % |
|---|---|---|---|---|
| Transport to destination | 75 | 71 | 62 | 65 |
| Transport from destination | 65 | 66 | 59 | 61 |
| Accommodation | 59 | 57 | 63 | 66 |
| Activities | 3 | 3 | 4 | 7 |
| Visitor centres/visitor attractions | 4 | 3 | 4 | 3 |
| Festival/Event tickets | 1 | 2 | 3 | 2 |
| Other | * | 3 | - | 3 |
| None of the above | 13 | 16 | 28 | 17 |

## 7.4 Websites Used

The main websites which respondents used to research and/or book their visit were as follows:

**Table 7.8: Websites used for research/booking**
**Base: online respondents who used the internet/websites (594)**

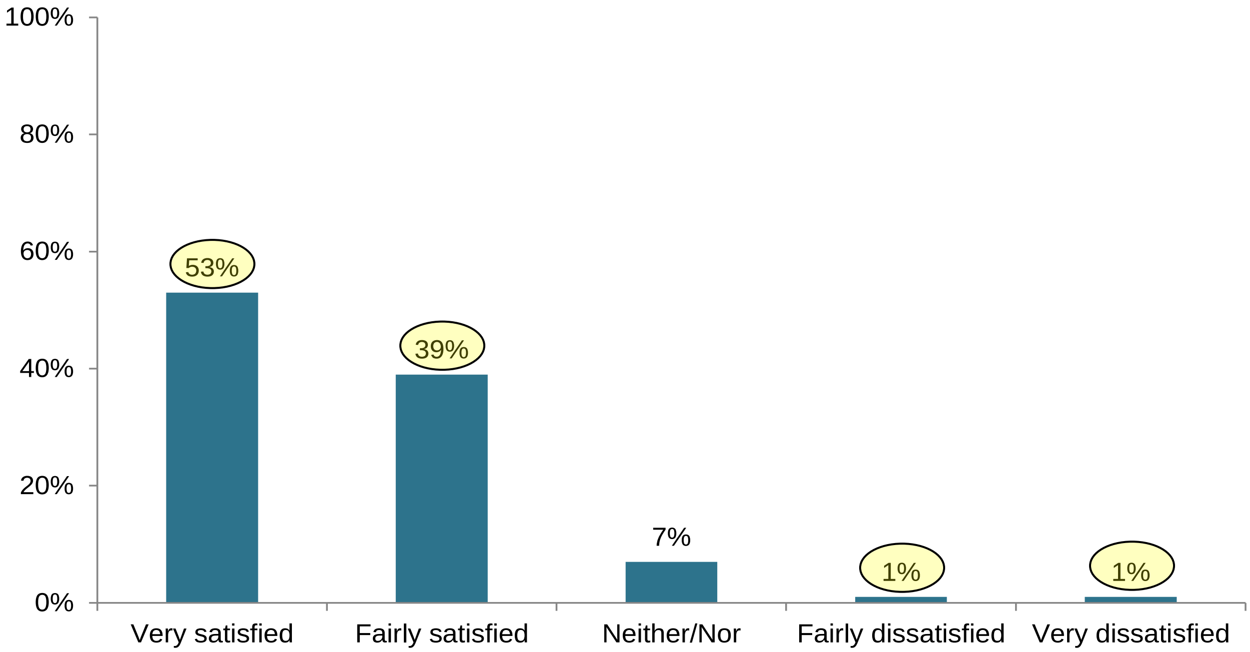
| Website | % |
|---|---|
| Pentland Ferries | 21 |
| Visit Orkney  | 18 |
| VisitScotland | 16 |
| NorthLink Ferries | 14 |
| Google | 11 |
| tripadvisor | 10 |
| Orkney Ferries | 7 |
| flybe. | 5 |
| Booking.com | 5 |
| Historic Scotland Alba Aosmhor | 3 |

### 7.5 Satisfaction with Information Sources

*7.5.1 Availability of information online*

Overall, 92% of respondents were very or fairly satisfied with the availability of online information when planning their trip with just 2% displaying any dissatisfaction.

**Chart 7.1: Satisfaction with availability of online information**
**Base: online respondents who rated availability of online information (670)**




Holiday and VFR respondents displayed similar levels of satisfaction, although the vast majority in all groups were at least fairly satisfied.

**Table 7.9: Satisfaction with availability of online information - total and by type of visit**
**Base: online respondents who rated availability of online information (670)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 53 | 53 | 57 | 47 |
| Fairly satisfied | 39 | 40 | 36 | 39 |
| Neither/Nor | 7 | 6 | 4 | 11 |
| Fairly dissatisfied | 1 | 1 | 3 | - |
| Very dissatisfied | 1 | 1 | - | 3 |
| | | | | |
| Mean score (out of 5) | 4.42 | 4.43 | 4.46 | 4.27 |

The main reasons for dissatisfaction with the availability of online information related to specific issues with websites (e.g. no contact phone numbers) and lack of information on facilities and services, particularly accommodation.

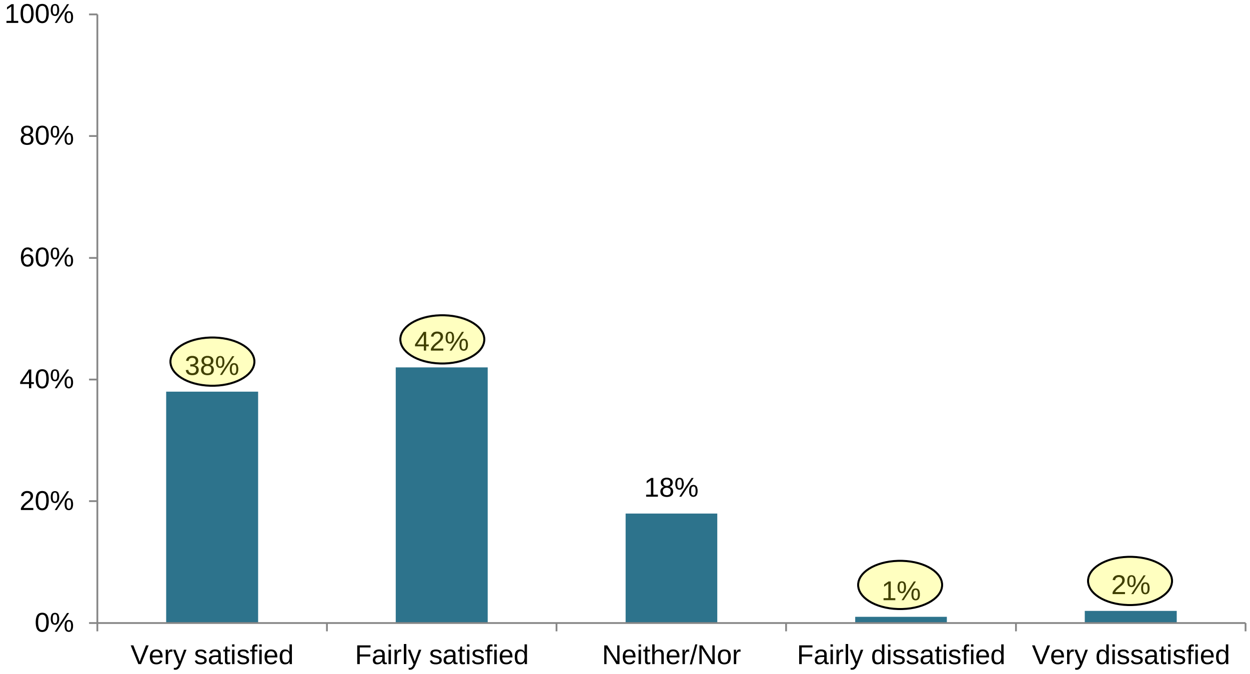
*"The information on restaurants, events and where to go is lacking and does not reflect the beauty of the island at all."*

*"I spent time searching 'Orkney accommodation', but got very few results."*

*7.5.2 Availability of information offline*

Overall, 80% of respondents were very or fairly satisfied with the availability of offline information when planning their trip with just 3% displaying any dissatisfaction.

**Chart 7.2: Satisfaction with availability of offline information**
**Base: online respondents who rated availability of offline information (522)**




At least three-quarters of all visitor types were satisfied with availability of offline information, with holiday and VFR respondents displaying very similar levels of satisfaction. Dissatisfaction was low, but slightly more apparent among business respondents (6%) than other types.

**Table 7.10: Satisfaction with availability of offline information - total and by type of visit**
**Base: online respondents who rated availability of offline information (522)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 38 | 38 | 37 | 31 |
| Fairly satisfied | 42 | 42 | 41 | 43 |
| Neither/Nor | 18 | 17 | 20 | 20 |
| Fairly dissatisfied | 1 | 1 | 2 | 2 |
| Very dissatisfied | 2 | 2 | - | 4 |
| | | | | |
| Mean score (out of 5) | 4.13 | 4.15 | 4.13 | 3.96 |

Comments from the small number of respondents who were dissatisfied with offline information highlighted a lack of local travel guides/books.

*"No travel guides available from local bookstore."*

### 7.6 Sources of Information (during visit)

Respondents were asked how they had obtained information about places to visit and things to do during their visit to Orkney. Table 7.11 shows that a wide variety of sources were used. Viewed by visitor type there are some notable differences

- In general, holiday respondents were most likely to seek out sources of information during their visit, with only 4% sourcing no information during their visit, compared to 20% of VFR and 29% of business respondents
- The results in the table below show that holiday respondents were much more likely than VFR or business respondents to source information from visitor information centres, brochures, local heritage information, guidebooks, proprietors and visitor information points
- Holiday respondents most likely source of information was from a visitor information centre or brochure (both 47%) whilst VFR respondents were most likely to ask locals (50%) and business respondents used smartphones/mobile internet (32%) or laptops (30%)

**Table 7.11: Sources of information (during visit) – total and by type of visit**
**Base: all online respondents (821)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Visitor Information Centre | 37 | 47 | 16 | 7 |
| Brochure e.g. VisitScotland | 36 | 47 | 21 | 6 |
| A smartphone/mobile Internet | 34 | 37 | 36 | 32 |
| Local heritage information - leaflets | 34 | 44 | 23 | 6 |
| Asking locals | 34 | 34 | 50 | 21 |
| A laptop | 27 | 26 | 29 | 30 |
| An iPad/tablet PC | 24 | 30 | 20 | 14 |
| Guide Books e.g. Lonely Planet | 24 | 34 | 11 | 1 |
| Locally produced guide books | 21 | 24 | 15 | 7 |
| Asking proprietors/service staff | 18 | 23 | 5 | 13 |
| Visitor Information Point | 18 | 24 | 8 | 1 |
| Internet – public/accommodation | 15 | 19 | 10 | 6 |
| Asking other travellers | 9 | 11 | 5 | 5 |
| Cafe with Internet access | 7 | 8 | 4 | 4 |
| Tour operator's brochure | 6 | 8 | 1 | - |
| Social media | 3 | 2 | 5 | 4 |
| The VisitScotland Day out app | 3 | 4 | - | 4 |
| None of the above | 11 | 4 | 20 | 29 |

**7.7 Sources of Information – Island Comparisons**

The behaviour displayed by respondents in terms of their sources of information pre and during visit was similar across the three locations.

Pre-visit

- Internet/websites were the most common source of pre-visit information for respondents on holiday and also for business respondents (though usage levels were much lower amongst business respondents). This was the case on all three locations
- For VFR respondents on each location 'advice from friends/relatives/others' was the most common source of pre-visit information

**Table 7.12: Sources of information - pre and during visit**
**Base: all online respondents**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % |
| **Sources of information - pre** | | | | | | | | | | | |
| Internet/websites | 83 | 51 | 51 | | 77 | 38 | 48 | | 85 | 50 | 55 |
| Advice from friends/relatives/others | 33 | 71 | 24 | | 33 | 64 | 22 | | 25 | 63 | 19 |
| Brochures/leaflets | 46 | 20 | 10 | | 33 | 11 | 8 | | 41 | 16 | 15 |
| Guidebooks | 45 | 23 | 3 | | 43 | 5 | 6 | | 44 | 5 | 4 |
| Travel operators (ferries, airlines) | 12 | 8 | 8 | | 18 | 6 | 12 | | 13 | 13 | 8 |
| Visitor Information Centre | 18 | 9 | 4 | | 17 | 3 | 2 | | 21 | 8 | 4 |
| Social media (Facebook/Twitter) | 3 | 5 | 3 | | 4 | 9 | - | | 10 | 15 | 7 |
| Travel Agent | 2 | 1 | 3 | | 2 | - | 1 | | 3 | 2 | 2 |
| None | 4 | 14 | 31 | | 5 | 23 | 29 | | 1 | 19 | 24 |

During visit

- Holiday respondents referred to a wide range of sources during their visits but in all locations Visitor Information Centres were the most common source (along with brochures in Orkney). Brochures, local heritage leaflets, asking locals and smartphones/mobile internet were also used by at least a third
- Respondents behaviour was similar in all three locations with similar proportions of respondents accessing information during their visit and using similar sources regardless of their location

**Table 7.13: Sources of information - pre and during visit**
**Base: all online respondents**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % |
| **Sources of Information - during** | | | | | | | | | | | |
| Visitor Information Centre | 47 | 16 | 7 | | 42 | 14 | 4 | | 52 | 16 | 4 |
| Brochure e.g. VisitScotland | 47 | 21 | 6 | | 36 | 5 | 7 | | 39 | 16 | 13 |
| A smartphone/mobile Internet | 37 | 36 | 32 | | 37 | 32 | 31 | | 35 | 32 | 41 |
| Local heritage information - leaflets | 44 | 23 | 6 | | 35 | 8 | 8 | | 41 | 16 | 7 |
| Asking locals | 34 | 50 | 21 | | 40 | 37 | 34 | | 48 | 48 | 26 |
| A laptop | 26 | 29 | 30 | | 28 | 25 | 23 | | 28 | 32 | 33 |
| An iPad/tablet PC | 30 | 20 | 14 | | 27 | 23 | 8 | | 24 | 21 | 12 |
| Guide Books e.g. Lonely Planet | 34 | 11 | 1 | | 31 | 4 | 1 | | 31 | 2 | - |
| Locally produced guide books | 24 | 15 | 7 | | 19 | 3 | 7 | | 27 | 10 | 5 |
| Asking proprietors/service staff | 23 | 5 | 13 | | 27 | 8 | 15 | | 28 | 11 | 14 |
| Visitor Information Point | 24 | 8 | 1 | | 18 | 5 | 1 | | 16 | 6 | 1 |
| Internet – public/accommodation | 19 | 10 | 6 | | 15 | 6 | 7 | | 15 | 10 | 7 |
| Asking other travellers | 11 | 5 | 5 | | 16 | 3 | 3 | | 18 | 13 | 6 |
| Cafe with Internet access | 8 | 4 | 4 | | 8 | 4 | 3 | | 8 | 2 | 5 |
| Tour operator's brochure | 8 | 1 | - | | 4 | 1 | 2 | | 8 | - | 1 |
| Social media | 2 | 5 | 4 | | 3 | 8 | 3 | | 6 | 15 | 2 |
| The VisitScotland Day out app | 4 | - | 4 | | 4 | 1 | - | | 3 | - | - |
| None of the above | 4 | 20 | 29 | | 7 | 25 | 31 | | 2 | 16 | 26 |

A comparison of online research topics and bookings on the three locations highlights the following:

- Accommodation was most likely to be researched and booked by holiday respondents. The proportions of holiday respondents doing this were very similar on each island location
- Researching and booking transport to/from the island was much more common on Orkney than on the Outer Hebrides or Shetland. This was the case for holiday, VFR and business respondents. Orkney does have more transport operators but it is unclear if this alone explains the large differences in behaviour

**Table 7.14: Online research and bookings**
**Base: online respondents who used the internet/websites**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % |
| **Online research topics** | | | | | | | | | | | |
| Accommodation | 77 | 35 | 76 | | 78 | 35 | 63 | | 77 | 29 | 72 |
| Transport to destination | 86 | 80 | 78 | | 28 | 17 | 11 | | 33 | 13 | 17 |
| Transport from destination | 71 | 69 | 63 | | 25 | 7 | 5 | | 26 | 10 | 11 |
| History/culture | 52 | 27 | 4 | | 32 | 13 | 16 | | 34 | 39 | 29 |
| Visitor centres/attractions | 50 | 27 | 7 | | 32 | 27 | 9 | | 41 | 23 | 21 |
| Activities | 31 | 20 | 17 | | 32 | 17 | 7 | | 34 | 39 | 9 |
| Natural history | 32 | 22 | 4 | | 27 | 10 | 11 | | 39 | 16 | 15 |
| Festivals/Events | 17 | 12 | 4 | | 16 | 22 | 7 | | 29 | 26 | 9 |
| Genealogy/family history | 4 | 8 | - | | 3 | 8 | - | | 3 | 10 | - |
| | | | | | | | | | | | |
| **Online booking** | | | | | | | | | | | |
| Accommodation | 67 | 29 | 39 | | 62 | 23 | 46 | | 61 | 13 | 32 |
| Transport to destination | 73 | 82 | 52 | | 24 | 15 | 21 | | 25 | 13 | 23 |
| Transport from destination | 67 | 73 | 43 | | 20 | 12 | 14 | | 18 | 10 | 17 |
| Festival/Event tickets | 1 | 2 | 2 | | 1 | 5 | - | | 9 | 3 | 2 |
| Activities | 4 | - | 2 | | 2 | 2 | - | | 6 | - | - |
| Visitor centres/visitor attractions | 4 | - | - | | 1 | - | - | | 3 | 3 | 4 |
| None of the above | 15 | 16 | 26 | | 21 | 47 | 35 | | 23 | 52 | 45 |

A comparison with mean scores on satisfaction with information sources highlights the following:

- Satisfaction with the availability of online information was similar across the three locations with the exception of VFR and business respondents on Shetland, where satisfaction was lower than that of holiday respondents
- On all three locations satisfaction with the availability of offline information was lower (than for satisfaction with online information). This was especially the case for business respondents on Orkney and holiday respondents on the Outer Hebrides and Shetland

**Table 7.15: Satisfaction with information sources**
**Base: online respondents who rated information sources**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Holiday** | **VFR** | **Business** | | **Holiday** | **VFR** | **Business** | | **Holiday** | **VFR** | **Business** |
| | Mean score (out of 5) | | | | Mean score (out of 5) | | | | Mean score (out of 5) | | |
| Satisfaction with availability of online information | 4.43 | 4.46 | 4.27 | | 4.39 | 4.40 | 4.40 | | 4.34 | 4.19 | 4.21 |
| Satisfaction with availability of offline information | 4.15 | 4.13 | 3.96 | | 3.99 | 4.16 | 4.13 | | 3.90 | 4.03 | 4.00 |

## 8. COMMUNICATION

### 8.1 Use of Social Media

During or after their visit, 38% of respondents had communicated about their visit using social media, with photo uploads and Facebook updates the most common forms of social media used.

- Holiday and VFR respondents were more likely than business respondents to use social media, though business respondents had the highest usage of Twitter with almost 10% using this form of social media
- There was a clear pattern by respondent age with uploading trip photos and updating Facebook much more common for those aged 16-24 (both 59%) than for those aged 65+ (12% and 5%).

**Table 8.1: Use of social media – total and by type of visit**
**Base: all online respondents (821)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Uploaded trip photos to the Internet | 30 | 32 | 32 | 24 |
| Updated Facebook status about trip | 24 | 25 | 29 | 22 |
| Tweeted about your trip | 3 | 2 | 3 | 9 |
| Blogged about your trip | 2 | 4 | - | 1 |
| None of these | 62 | 59 | 59 | 67 |

All respondents, regardless of residence, displayed a tendency to use social media as a means of communicating about their visit to Orkney. Over half of respondents from the rest of the world used social media, with uploading photos particularly popular.

**Table 8.2: Use of social media – by respondent residence**
**Base: all online respondents (821)**

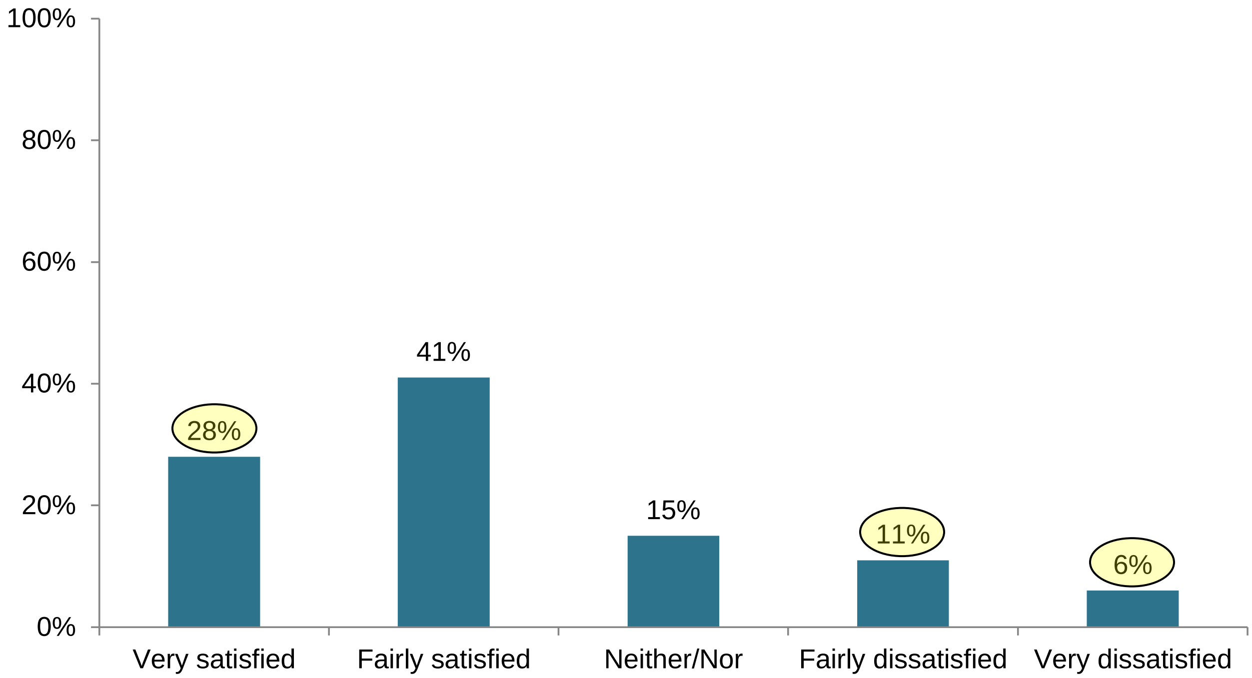
| | Scotland % | UK/Ire % | Europe % | RoW % |
|---|---|---|---|---|
| Uploaded trip photos to the Internet | 28 | 27 | 30 | 42 |
| Updated Facebook status about trip | 24 | 21 | 23 | 29 |
| Tweeted about your trip | 5 | 3 | 1 | - |
| Blogged about your trip | 1 | 2 | 5 | 7 |
| None of these | 64 | 67 | 57 | 48 |

## 8.2 Satisfaction with Communications

*8.2.1 Availability of mobile phone reception*

Over two-thirds of respondents were satisfied with the availability of mobile phone reception, with just over a quarter (28%) saying they were very satisfied. A notable proportion (17%) showed dissatisfaction.

**Chart 8.1: Satisfaction with availability of mobile phone reception**
**Base: online respondents who rated availability of mobile phone reception (717)**




Respondents on holiday were more satisfied with mobile phone reception than VFR and business respondents. 28% of VFR respondents and 23% of business respondents expressed dissatisfaction.

**Table 8.3: Satisfaction with availability of mobile phone reception - total and by type of visit**
**Base: online responses who rated availability of mobile phone reception (717)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 28 | 31 | 19 | 21 |
| Fairly satisfied | 41 | 44 | 34 | 45 |
| Neither/Nor | 15 | 14 | 19 | 11 |
| Fairly dissatisfied | 11 | 7 | 21 | 16 |
| Very dissatisfied | 6 | 5 | 7 | 7 |
| | | | | |
| Mean score (out of 5) | 3.75 | 3.89 | 3.36 | 3.57 |

The main reason for dissatisfaction with mobile phone reception was the 'patchy' phone connection or complete lack of connection. These comments related to all the main providers.

*"Didn't have any reception on my phone (Vodafone) and intermittent on my wife's (Orange/EE)."*

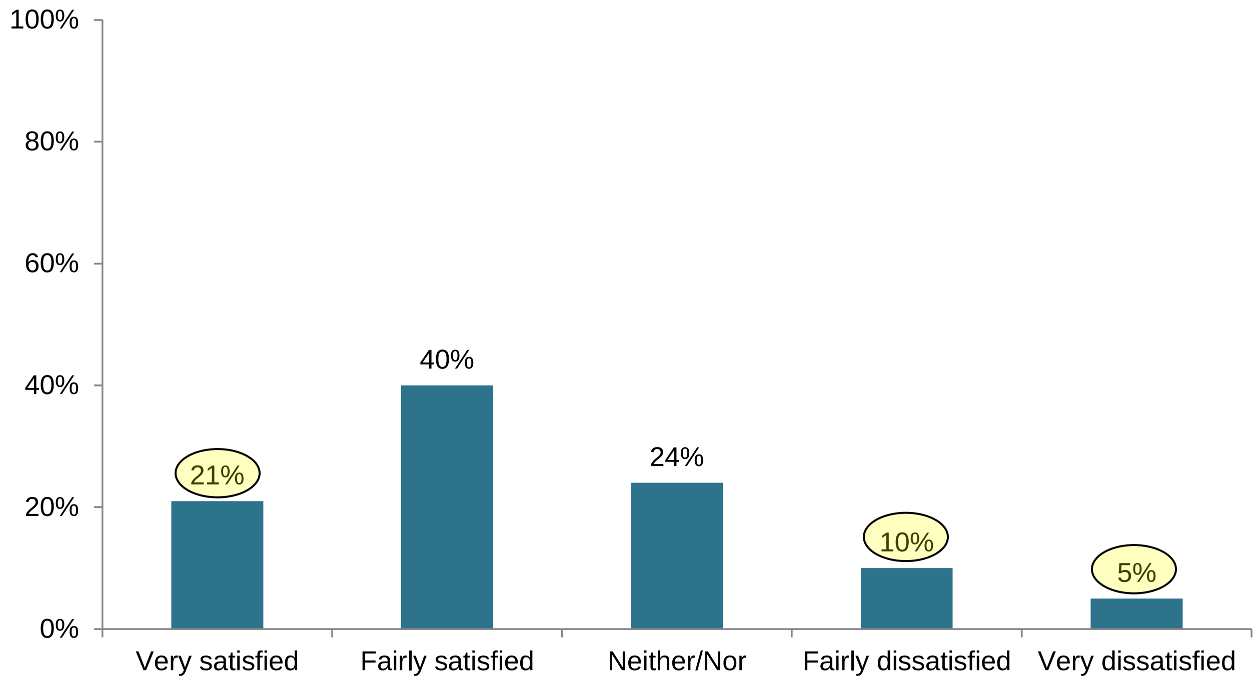
There were also several comments about the poor access to mobile internet services via 3G.

*"The lack of 3G is pretty frustrating."*

*8.2.2 Availability of WiFi/broadband access*

As with mobile phone reception, satisfaction with the availability of WiFi/broadband was mixed. Although three in five respondents were satisfied, only a fifth were very satisfied. 15% were dissatisfied.

**Chart 8.2: Satisfaction with availability of WiFi/broadband access**
**Base: online respondents who rated availability of WiFi/broadband access (636)**




Over a fifth of VFR and business respondents were dissatisfied with the availability of WiFi/broadband during their visit.

**Table 8.4: Satisfaction with availability of WiFi/broadband access - total and by type of visit**
**Base: online respondents who rated availability of WiFi/broadband access (636)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 21 | 26 | 18 | 10 |
| Fairly satisfied | 40 | 38 | 35 | 44 |
| Neither/Nor | 24 | 23 | 26 | 24 |
| Fairly dissatisfied | 10 | 9 | 17 | 8 |
| Very dissatisfied | 5 | 4 | 4 | 14 |
| | | | | |
| Mean score (out of 5) | 3.62 | 3.73 | 3.46 | 3.27 |

The main reasons for dissatisfaction with the availability of WiFi/broadband were the very limited access to WiFi and the slowness of connections.

*"Not much WIFI services available. And if, often only available with registration or payment."*

*"Saw very little evidence of it. None in the cottage we stayed in. Local pub had it but it was struggling on bandwidth."*

*"Didn't have access in our accommodation and there were very few places we could access it. Decided we won't stay anywhere without WiFi in future as it's too difficult to find information."*

### 8.3 Communication – Island Comparisons

Respondent's use of social media on all three islands was similar:

- Uploading trip photos and updating Facebook were the most common uses of social media and similar proportions of holiday, VFR and business respondents were doing this on each island.
- On Orkney holiday and VFR respondents were equally likely to use social media in relation to their visit whilst on the Outer Hebrides and Shetland it was VFR respondents alone who were the most likely group to use social media

**Table 8.5: Use of Social Media**
**Base: all online respondents**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % |
| Uploaded trip photos to Internet | 32 | 32 | 24 | | 33 | 34 | 20 | | 35 | 45 | 26 |
| Updated Facebook about trip | 25 | 29 | 22 | | 25 | 37 | 28 | | 29 | 47 | 27 |
| Tweeted about your trip | 2 | 3 | 9 | | 4 | 4 | 5 | | 5 | 5 | 5 |
| Blogged about your trip | 4 | - | 1 | | 2 | 1 | 1 | | 4 | 2 | 1 |
| None of these | 59 | 59 | 67 | | 60 | 53 | 62 | | 58 | 42 | 65 |

A comparison with mean scores on satisfaction with communications highlights the following:

- Holiday respondents were most satisfied with the availability of mobile phone reception and WiFi/broadband on Orkney and Shetland
- On the Outer Hebrides, holiday, VFR and business respondents displayed similar levels of satisfaction with communications

**Table 8.6: Satisfaction with communications**
**Base: online respondents who rated communication**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Holiday | VFR | Business | | Holiday | VFR | Business | | Holiday | VFR | Business |
| | Mean score (out of 5) | | | | Mean score (out of 5) | | | | Mean score (out of 5) | | |
| Satisfaction with availability of mobile phone reception | 3.89 | 3.36 | 3.57 | | 3.33 | 3.34 | 3.32 | | 3.56 | 3.22 | 3.34 |
| Satisfaction with availability of WiFi/broadband access | 3.73 | 3.46 | 3.27 | | 3.30 | 3.22 | 3.33 | | 3.57 | 3.55 | 3.49 |

## 9. TRANSPORT

### 9.1 Arriving and Departing

Ferry was the most common form of transport for respondents arriving and departing Orkney, with around three-quarters using this form of transport. The availability and competition offered by four ferry terminals may explain why ferry is higher than flight usage. It should be noted that these results highlight the transport options chosen by survey respondents and are not meant to provide representative results on overall transport methods.

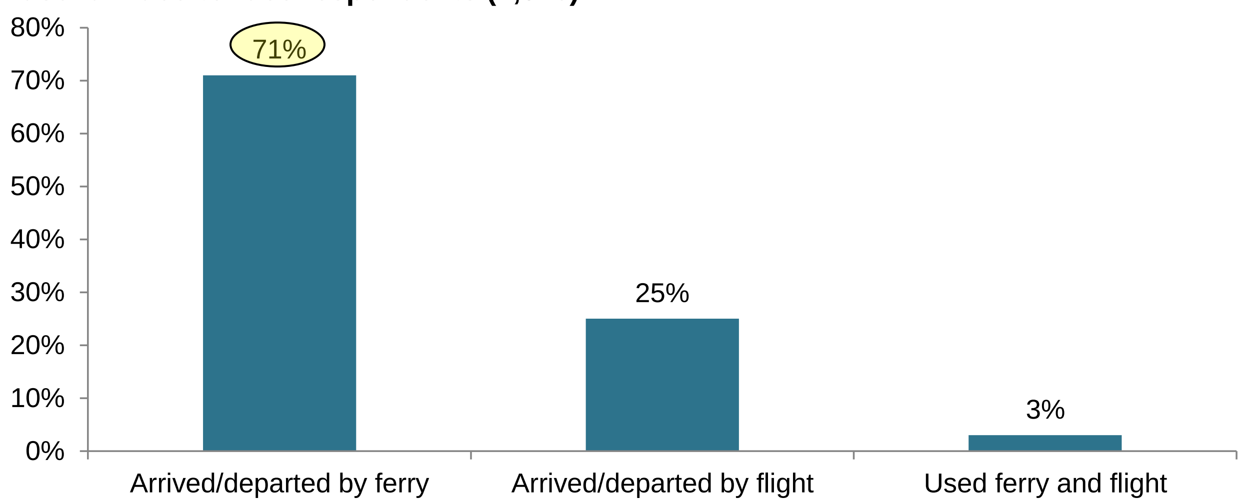
**Table 9.1: Arrival and departure points**
**Base: all face-to-face respondents (1,328)**

| | Arrived from % | Departed to % |
|---|---|---|
| Ferry | 74 | 72 |
| *- Gills Bay - ferry* | *31* | *26* |
| *- Scrabster - ferry* | *23* | *23* |
| *- John O'Groats - ferry* | *9* | *9* |
| *- Aberdeen - ferry* | *7* | *9* |
| *- Lerwick - ferry* | *4* | *5* |
| | | |
| Flight | 26 | 28 |
| *- Edinburgh - flight* | *9* | *9* |
| *- Aberdeen - flight* | *7* | *8* |
| *- Glasgow - flight* | *6* | *7* |
| *- Inverness - flight* | *2* | *2* |
| *- Sumburgh - flight* | *2* | *2* |
| *- Bergen - flight* | * | * |

Chart 9.1 shows that 71% of respondents arrived <u>and</u> departed by ferry whilst a quarter travelled to/from Orkney on a flight. More specifically:

- Respondents on holiday were more likely to be arriving/departing by ferry (83%) than VFR (60%) or business (52%) respondents
- Business respondents were most likely to be arriving/departing on a flight (44%)

**Chart 9.1: Arrival and departure methods**
**Base: all face-to-face respondents (1,328)**



Transport methods to/from Orkney varied over the research period with ferries being used by more respondents between April-September (compared to October-March) with a corresponding decrease in the use of flights as the proportion of business respondents declined. It should be noted that the Stromness to Scrabster ferry service was suspended for most of May 2013 which could have affected these results.

**Table 9.2: Arrival and departure methods – by quarter**
**Base: all face-to-face respondents (1,328)**

| | Q1 % Oct-Dec | Q2 % Jan-Mar | Q3 % Apr-Jun | Q4 % Jul-Sep |
|---|---|---|---|---|
| Arrived/departed by ferry | 58 | 53 | 67 | 79 |
| Arrived/departed by flight | 37 | 45 | 29 | 18 |
| Used ferry and flight | 5 | 2 | 4 | 2 |

### 9.2 Satisfaction with Departure Points

Respondent satisfaction with the facilities and services at departure points varied, with high satisfaction at Kirkwall airport and Stromness ferry but lower satisfaction with Hatston ferry terminal and St Margaret's Hope ferry. Some reasons for dissatisfaction are highlighted below.

**Table 9.3: Satisfaction with departure point facilities and services**
**Base: face-to-face respondents at departure**

| | Kirkwall Airport | Hatston Ferry | Stromness Ferry | St Margaret's Hope |
|---|---|---|---|---|
| Number of respondents | 370 | 167 | 299 | 363 |
| | % | % | % | % |
| Very satisfied | 77 | 47 | 74 | 15 |
| Fairly satisfied | 19 | 25 | 13 | 54 |
| Neither/Nor | 2 | 23 | 12 | 28 |
| Fairly dissatisfied | 1 | 4 | * | 1 |
| Very dissatisfied | 1 | - | - | 1 |

The main reasons for dissatisfaction with departure point services and facilities were:

- St Margaret's Hope
  - toilet facilities unclean/inadequate
- Kirkwall Airport
  - poor customer service/assistance
- Hatston Ferry
  - facilities closed for late night sailings
  - vending machines not adequate - need cafe

Respondents to the online survey were also asked about their satisfaction with the departure points they had used. Table 9.4 shows that in general the vast majority of respondents would be happy to recommend the ferry terminal or airport they departed from.

**Table 9.4: Likelihood of recommending departure point to others**
**Base: online respondents using departure points**

| | Kirkwall Airport | Hatston Ferry | Stromness Ferry | St Margaret's Hope |
|---|---|---|---|---|
| Number of respondents | 158 | 84 | 179 | 372 |
| | % | % | % | % |
| Yes | 99 | 98 | 96 | 99 |
| No | 1 | 1 | 4 | 1 |

Note: Burwick excluded as interviews took place at Kirkwall Travel Centre.

The reasons for not recommending departure points related to specific issues and experiences of respondents, ranging from ferry costs being high (particularly to Stromness) to examples of poor customer service.

### 9.3 Transport during Visit

*9.3.1 Transport during visit – 2013*

Car, whether own/friends/firms or hired, was the main form of transport for almost half of all respondents. VFR (66%) and business (56%) respondents were more likely to be using a car (own/friends/firms) than respondents on holiday (42%).

Over half of respondents had no secondary form of transport whilst on their visit, however, ferry/public boat (22%) and walking (20%) were the most common 'other' forms of transport.

- VFR (29%) and holiday (24%) respondents were more likely than business respondents (12%) to have used ferry/public boats
- Business (24%) and holiday (21%) respondents were more likely to have spent time walking during their visit than VFR respondents (12%)

**Table 9.5: Transport during visit**
**Base: all face-to-face respondents (1,328)**

| | Main form of transport % | Other forms of transport % |
|---|---|---|
| Car – own/friends/firms | 49 | 2 |
| Car – hired | 18 | * |
| Regular bus/coach | 9 | 5 |
| Organised coach tour | 6 | 1 |
| Taxi | 5 | 7 |
| Motorhome | 3 | * |
| Walked | 3 | 20 |
| Bicycle | 2 | 2 |
| Ferry/public boat | 1 | 22 |
| Motorbike | 1 | - |
| Plane | * | 4 |
| Private boat (owned/hired) | * | 1 |
| Hitch-hiked | * | * |
| None | * | 53 |

*9.3.2 Transport during visit – comparison with previous visitor surveys*

Visitors use of cars (either private or hire) had increased from 60% in 2009 to 70% in 2013. The other types of transport to show increases were ferries and coach tours, along with an increase in visitors walking. The main decrease is in the use of regular bus trips, which returned to the 2005 level.

**Table 9.6: Transport during visit - comparison with previous visitor surveys**
**Base: all respondents**

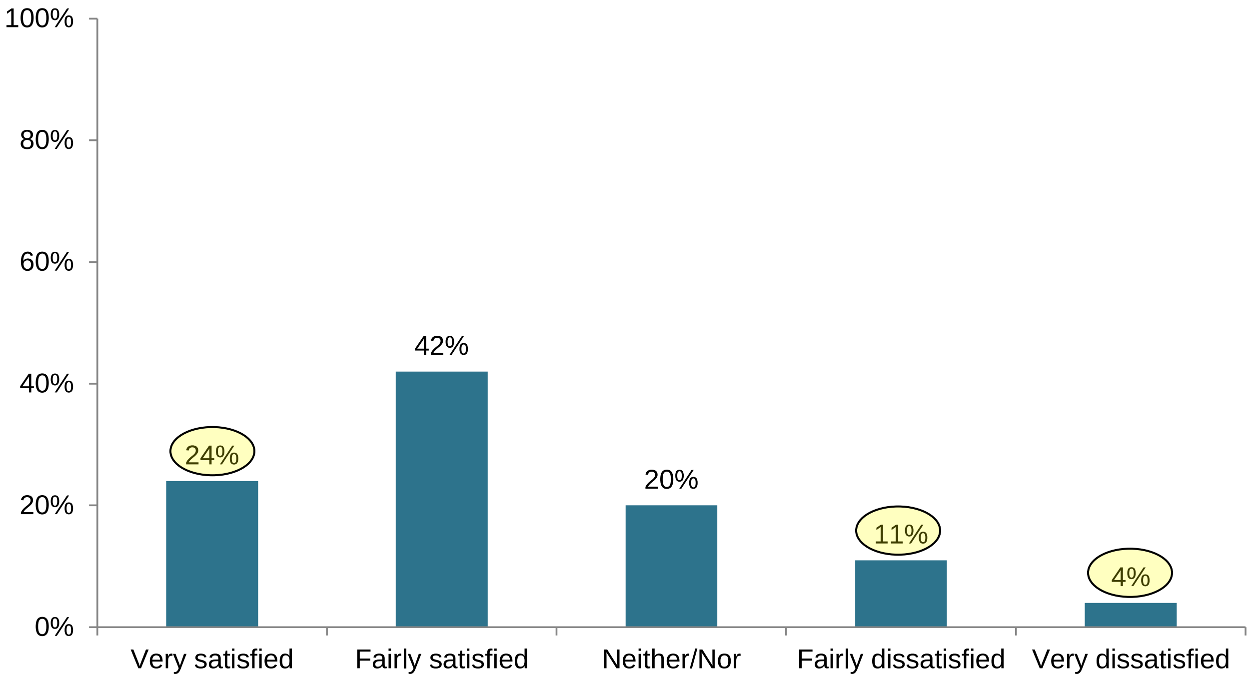
| | **2013** | **2009** | **2005** |
|---|---|---|---|
| Number of respondents | 1328 | 1149 | 1273 |
| | **%** | **%** | **%** |
| Car – own/friends/firms | 51 | 44 | 53 |
| Car – hired | 19 | 16 | 16 |
| Regular bus/coach | 14 | 19 | 14 |
| Taxi | 12 | 14 | 10 |
| Walked | 23 | 18 | 20 |
| Ferry/public boat | 23 | 14 | 21 |
| Coach tour | 7 | 3 | n/a |
| Bicycle | 4 | 6 | 5 |
| Motorhome | 2 | 3 | n/a |

## 9.4 Satisfaction with Transport

*9.4.1 Cost of travel to Orkney*

Two-thirds of respondents were very or fairly satisfied with the cost of travel to Orkney, however, just a quarter were 'very' satisfied and 15% of respondents highlighted dissatisfaction with the cost of travel.

**Chart 9.2: Satisfaction with the cost of travel to Orkney**
**Base: online respondents who rated cost of travel to Orkney (703)**




Viewed by type of visit it is clear that VFR and business respondents were less satisfied than holiday with the cost of travel to Orkney, with 23% and 31% displaying dissatisfaction.

**Table 9.7: Satisfaction with the cost of travel to Orkney - total and by type of visit**
**Base: online responses who rated cost of travel to Orkney (703)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 24 | 24 | 16 | 23 |
| Fairly satisfied | 42 | 45 | 37 | 33 |
| Neither/Nor | 20 | 21 | 23 | 14 |
| Fairly dissatisfied | 11 | 9 | 21 | 17 |
| Very dissatisfied | 4 | 2 | 2 | 14 |
| | | | | |
| Mean score (out of 5) | 3.71 | 3.80 | 3.43 | 3.35 |

Comments on reasons for being dissatisfied showed that respondents were dissatisfied with the cost of flights and ferries. Many respondents made unfavourable comparisons with the costs of travelling to Orkney and travelling abroad.

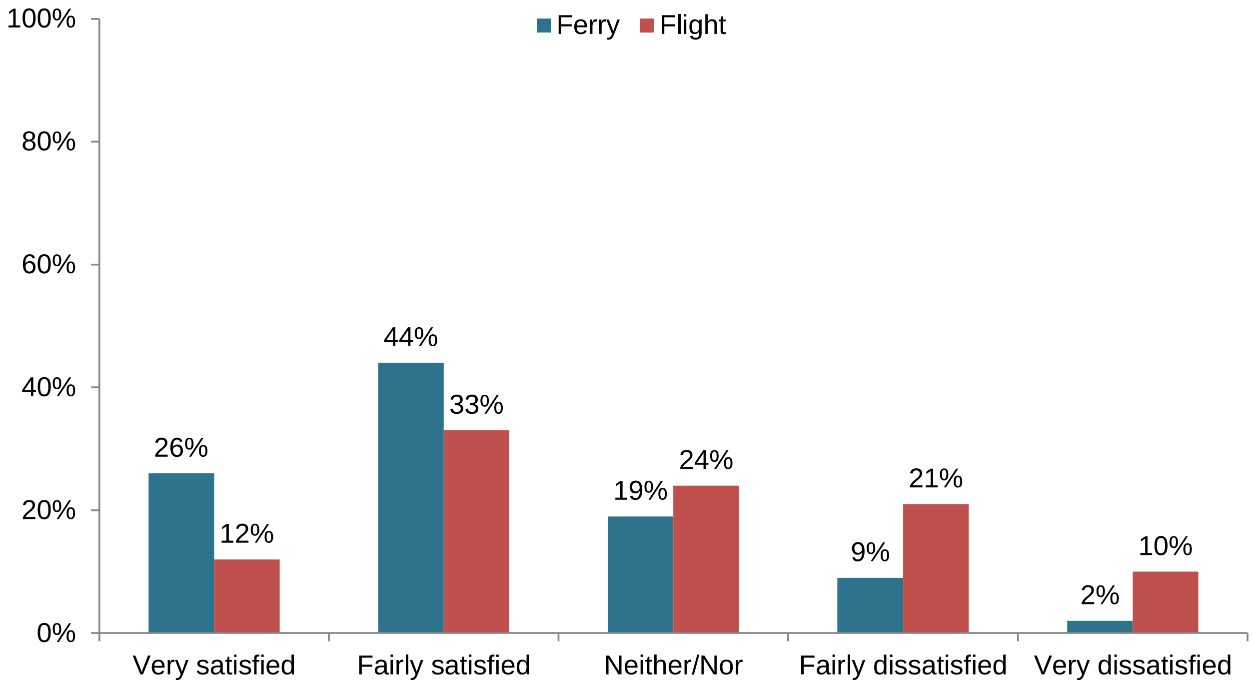
*"Air travel very expensive. Frequently in excess of £200 for Inverness – Kirkwall."*

*"Far too expensive with a motorhome on sea crossing. Cheaper for a return trip to France!"*

*9.4.2 Cost of travel to the Outer Hebrides – ferry vs flight*

A comparison of ferry and flight highlights that ferry passengers displayed higher levels of satisfaction than flight passengers with the cost of getting to Orkney, with seven-tenths of ferry passengers very or quite satisfied compared to under half of flight passengers (45%). The results are further emphasised by an overall mean score of 3.86 (out of 5) for ferry passengers satisfaction compared with 3.16 for flight passengers.

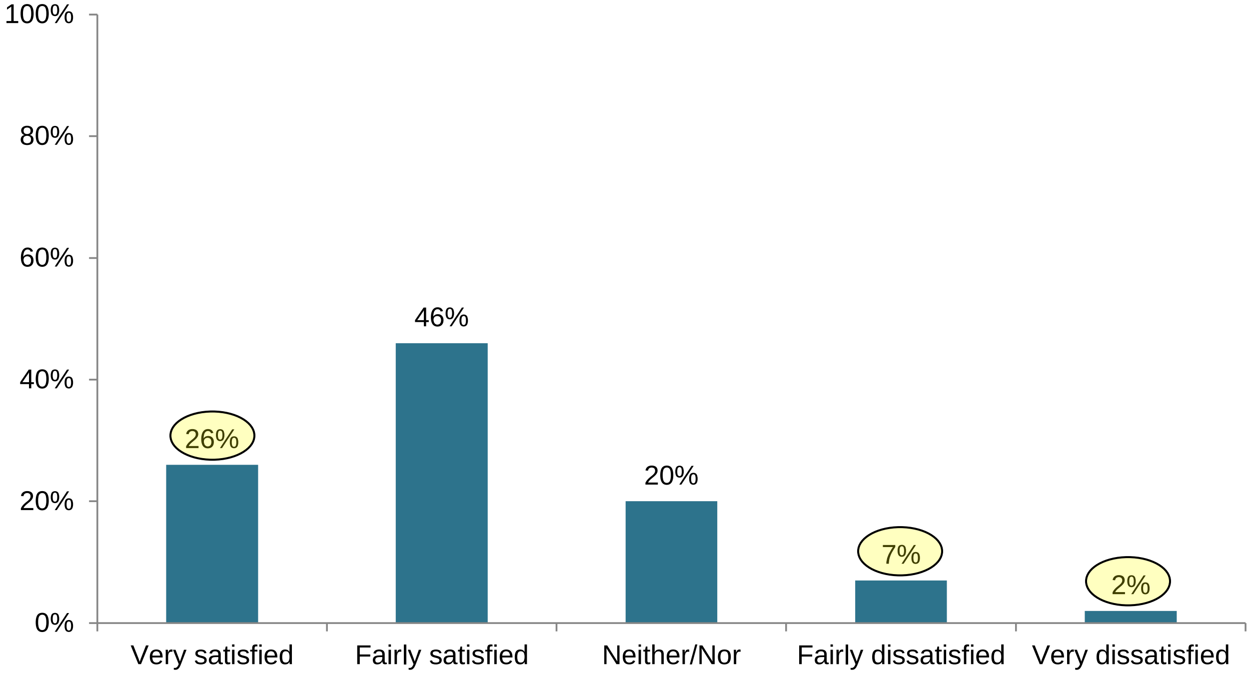
**Chart 9.3: Satisfaction with the cost of travel to Orkney – ferry vs flight**
**Base: online respondents who rated cost of travel to Orkney (703)**



### 9.4.3 Cost of travel in Orkney

Although nearly three-quarters of respondents were satisfied with the cost of travel in Orkney, the proportion very satisfied was just over a quarter. Almost one in ten (9%) of respondents displayed some dissatisfaction.

**Chart 9.4: Satisfaction with cost of travel in Orkney**
**Base: online respondents who rated cost of travel in Orkney (635)**




Levels of satisfaction with the cost of travel in Orkney were broadly similar for different types of visitor, although VFR respondents did show slightly higher levels of dissatisfaction.

**Table 9.8: Satisfaction with cost of travel in Orkney - total and by type of visit**
**Base: online respondents who rated cost of travel in Orkney (635)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 26 | 27 | 18 | 21 |
| Fairly satisfied | 46 | 45 | 46 | 45 |
| Neither/Nor | 20 | 20 | 21 | 23 |
| Fairly dissatisfied | 7 | 7 | 10 | 8 |
| Very dissatisfied | 2 | 1 | 5 | 3 |
| | | | | |
| Mean score (out of 5) | 3.87 | 3.91 | 3.62 | 3.75 |

The main reasons for dissatisfaction with travel in Orkney related to the costs of inter-island, ferries, petrol, hire car and buses. Several respondents also described costs of flight to the islands as being 'prohibitive'.

*"Petrol prices on the island should be subsidised by the government."*

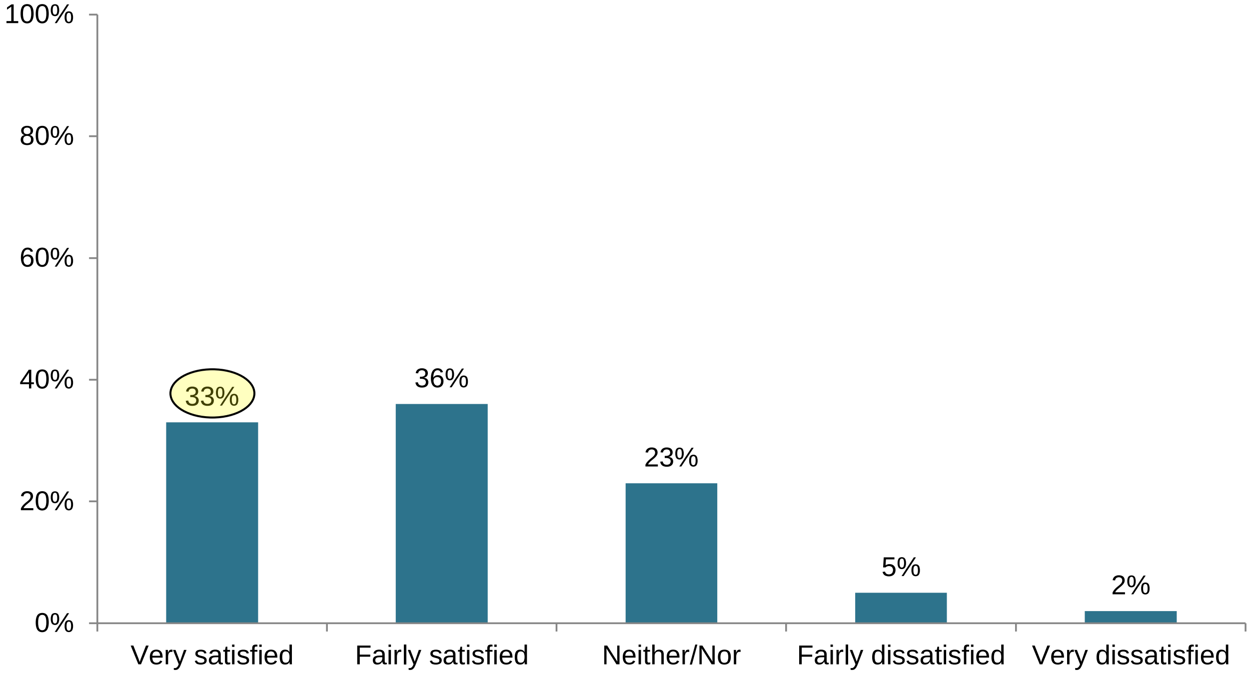
*"Local buses were expensive."*

*"Cost of inter-island ferries is extortionate."*

*9.4.4 Availability of public transport*

Just over two-thirds of respondents were very or fairly satisfied with the availability of public transport, a third being very satisfied. 7% expressed dissatisfaction.

**Chart 9.5: Satisfaction with availability of public transport**
**Base: online respondents who rated availability of public transport (341)**




Satisfaction levels with the availability of public transport were fairly similar across visitor types, though holiday respondents were slightly more likely to be very satisfied. A substantial proportion of each provided a neutral response, including a third of VFR respondents. Where dissatisfaction was expressed, it was most evident among holiday respondents (11%). Some reasons for dissatisfaction are highlighted below.

**Table 9.9: Satisfaction with availability of public transport - total and by type of visit**
**Base: online respondents who rated availability of public transport (341)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 33 | 33 | 27 | 25 |
| Fairly satisfied | 36 | 36 | 37 | 44 |
| Neither/Nor | 23 | 20 | 33 | 28 |
| Fairly dissatisfied | 5 | 8 | 2 | - |
| Very dissatisfied | 2 | 3 | 2 | 3 |
| | | | | |
| Mean score (out of 5) | 3.93 | 3.89 | 3.84 | 3.89 |

The main reasons for dissatisfaction with the availability of public transport related to limited bus services to visitor attractions (e.g. Skara Brae and Tomb of the Eagles) and infrequent bus services (including no Sunday service).

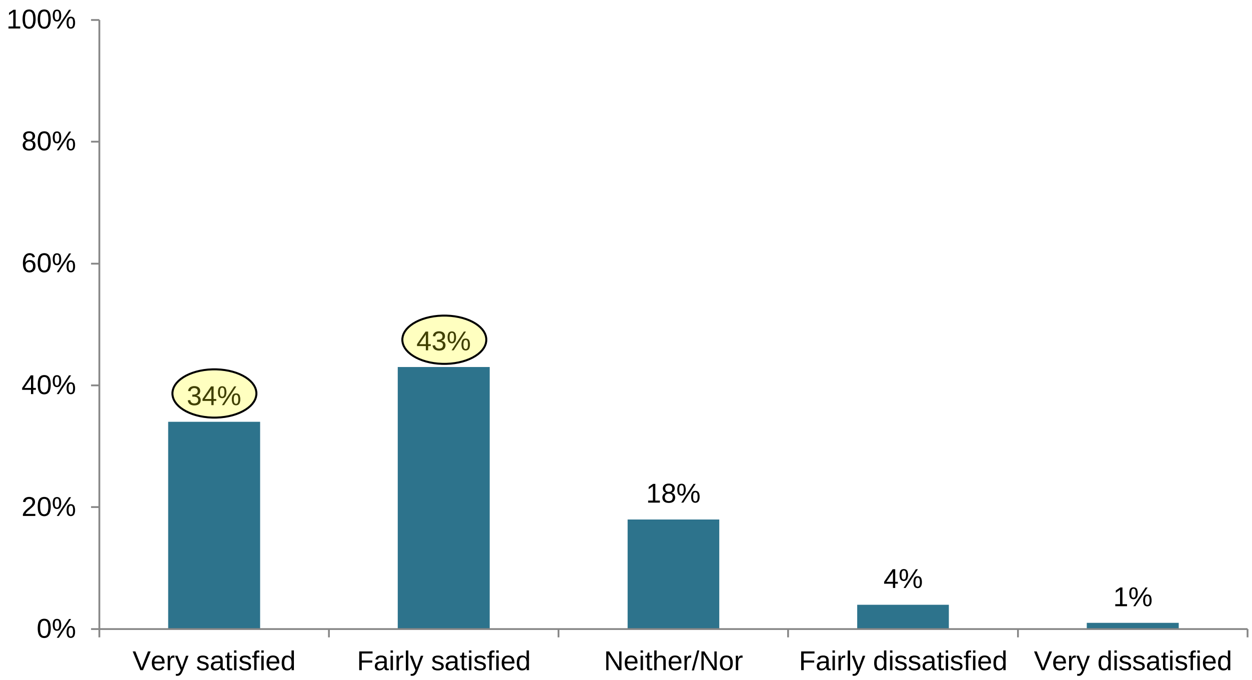
*"Buses are limited to some tourist areas, including major attractions like Skara Brae."*

*"Generally, it was really good but it was really difficult to get to the "north" part of the mainland."*

*9.4.5 Value for money of public transport*

Three-quarters of respondents (77%) were satisfied with the value for money of public transport (which included local buses and inter-island ferries), with a third (34%) very satisfied. There were fairly low levels of dissatisfaction.

**Chart 9.6: Satisfaction with value for money of public transport**
**Base: online respondents who rated value for money of public transport (418)**




VFR respondents showed slightly lower levels of satisfaction with the value for money of public transport than other types of visitor. Dissatisfaction, though low, was most evident among VFR and holiday respondents.

**Table 9.10: Satisfaction with value for money of public transport - total and by type of visit**
**Base: online respondents who rated value for money of public transport (418)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 34 | 34 | 19 | 25 |
| Fairly satisfied | 43 | 44 | 43 | 45 |
| Neither/Nor | 18 | 16 | 32 | 27 |
| Fairly dissatisfied | 4 | 5 | 6 | 2 |
| Very dissatisfied | 1 | 1 | - | - |
| | | | | |
| Mean score (out of 5) | 4.05 | 4.06 | 3.75 | 3.93 |

Comments by respondents who were dissatisfied with the value for money of public transport focussed on the costs of inter-island ferries.

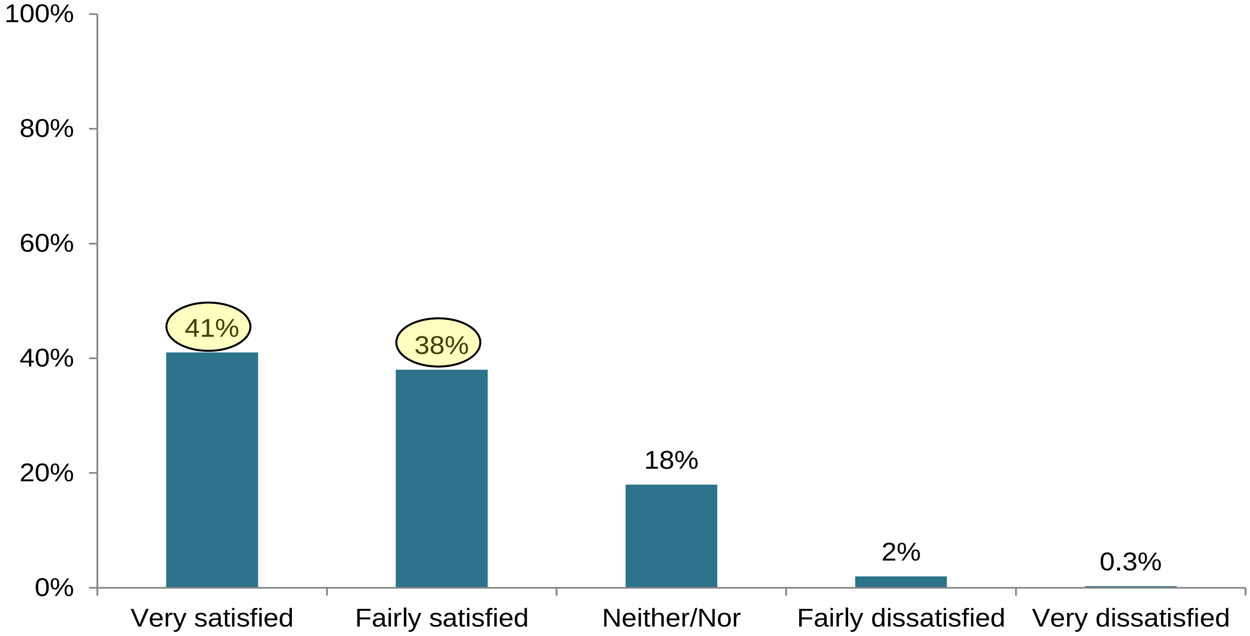
*"Thought the cost of the interisland ferries was very expensive."*

*"Ferry to Hoy for a day trip was very expensive."*

*9.4.6 Quality of public transport*

Almost four-fifths of respondents were very or fairly satisfied with the quality of public transport with only a small proportion of respondents showing any dissatisfaction.

**Chart 9.7: Satisfaction with quality of public transport**
**Base: online respondents who rated quality of public transport (345)**




Holiday respondents were the most positive about the quality of public transport in Orkney, with VFR and business respondents showing a similar pattern of response (almost a quarter of each provided a neutral response). Dissatisfaction was low among all groups.

**Table 9.11: Satisfaction with quality of public transport - total and by type of visit**
**Base: online respondents who rated quality of public transport (345)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 41 | 43 | 30 | 27 |
| Fairly satisfied | 38 | 38 | 46 | 46 |
| Neither/Nor | 18 | 17 | 22 | 24 |
| Fairly dissatisfied | 2 | 2 | 2 | - |
| Very dissatisfied | * | - | - | 3 |
| | | | | |
| Mean score (out of 5) | 4.18 | 4.22 | 4.04 | 3.95 |

The few comments on reasons for dissatisfaction with the quality of public transport, focussed on the poor quality of ferries.

*"Age of ferries within Orkney!"*

*"The ferry we took from Westray to Kirwall offered very basic accommodation."*

### 9.5 Transport – Island Comparisons

Main forms of transport were quite consistent across the three island locations:

- Car – own/friends/firms was most likely to be used by VFR respondents on the Outer Hebrides (83%) compared to Shetland (67%) and Orkney (66%). Similarly, holiday respondents on the Outer Hebrides (68%) were more likely to use this form of transport than holiday respondents on Orkney (42%) or Shetland (24%)
- A third of holiday respondents on Shetland had hired a car compared to 22% on Orkney and just 13% on the Outer Hebrides
- Over half of business respondents on Orkney and the Outer Hebrides had used a 'car – own/friends/firms' whilst on Shetland just 39% had done so with more hiring a car (30%), compared to the Outer Hebrides (19%) and Orkney (11%)
- Use of regular bus/coach services was much lower on the Outer Hebrides (especially amongst holiday respondents) than on Orkney and Shetland

**Table 9.12: Transport during visit – Main form of transport**
**Base: all face-to-face respondents**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % |
| Car – own/friends/firms | 42 | 66 | 56 | | 68 | 83 | 51 | | 24 | 67 | 39 |
| Car – hired | 22 | 17 | 11 | | 13 | 4 | 19 | | 33 | 18 | 30 |
| Regular bus/coach | 12 | 8 | 5 | | 3 | 3 | 2 | | 15 | 5 | 7 |
| Taxi | 1 | 1 | 16 | | - | * | 14 | | 5 | 2 | 15 |
| Walked | 3 | 1 | 4 | | 2 | 3 | 4 | | 8 | 6 | 5 |
| Organised coach tour | 9 | 3 | - | | 1 | * | 1 | | 3 | - | 1 |
| Motorhome | 5 | 1 | * | | 6 | 3 | - | | 1 | 1 | - |
| Bicycle | 2 | 1 | 1 | | 4 | 1 | - | | 5 | * | * |
| Ferry/public boat | * | - | 3 | | * | - | - | | 2 | - | - |
| Motorbike | 1 | - | - | | 1 | 1 | * | | 2 | * | * |
| Plane | - | * | - | | - | 1 | 1 | | * | - | * |
| Hitch-hiked | * | - | - | | * | - | - | | 1 | - | - |
| Private boat (owned/hired) | * | - | * | | * | * | - | | - | - | - |

A comparison with mean scores on satisfaction with transport highlights the following:

- In general, holiday respondents were most satisfied with transport with the following variations identifiable:
  - On Orkney and the Outer Hebrides, holiday respondents were most satisfied with the quality of public transport
  - On Shetland, holiday respondents were most satisfied with the value for money of public transport
- VFR and business respondents were less satisfied with transport, especially with the cost of travel to their location, and especially on Shetland

**Table 9.13: Satisfaction with transport**
**Base: online respondents who rated transport**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Holiday** | **VFR** | **Business** | | **Holiday** | **VFR** | **Business** | | **Holiday** | **VFR** | **Business** |
| | Mean score (out of 5) | | | | Mean score (out of 5) | | | | Mean score (out of 5) | | |
| Satisfaction with the cost of travel to… | 3.80 | 3.43 | 3.35 | | 4.06 | 3.60 | 3.61 | | 3.53 | 2.69 | 2.81 |
| Satisfaction with cost of travel in… | 3.91 | 3.62 | 3.75 | | 3.98 | 3.70 | 3.57 | | 3.86 | 3.42 | 3.27 |
| Satisfaction with value for money of public transport | 4.06 | 3.75 | 3.93 | | 4.10 | 3.95 | 3.67 | | 4.25 | 3.88 | 3.81 |
| Satisfaction with quality of public transport | 4.22 | 4.04 | 3.95 | | 4.18 | 3.91 | 3.79 | | 4.22 | 3.95 | 4.00 |
| Satisfaction with availability of public transport | 3.89 | 3.84 | 3.89 | | 3.89 | 3.84 | 3.89 | | 3.84 | 3.62 | 3.75 |

# 10. ACCOMMODATION

## 10.1 Accommodation during Visit

*10.1.1 Accommodation during visit – 2013*

Respondents were asked to identify the type/s of accommodation they stayed in during their visit. Almost a third of respondents stayed in hotel accommodation, with 3 star hotels accounting for the majority of these stays (28%). Other common forms of accommodation were self-catering and guest house/B&B, each of which accounted for nearly a fifth of respondents.

- Business respondents (54%) were more likely than those on holiday (27%) or VFR (17%) to use hotel accommodation
- Self-catering was a more popular option for those on holiday (24%) compared to VFR (16%) and business (9%)
- Guest house/B&B was popular with those on holiday (22%) and business (15%) but not with VFR respondents (9%)
- Perhaps unsurprisingly, over half of VFR respondents (53%) were staying with friends/family whilst 15% of respondents on business were staying in workers' accommodation.

In terms of residence, respondents from the rest of the world (43%) were most likely to be staying in hotel accommodation, compared to respondents from Scotland (36%), the rest of the UK/Ireland (28%) and Europe (24%).

**Table 10.1: Accommodation during visit**
**Base: face-to-face respondents staying overnight (1,171)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Hotel (all) | 32 | 27 | 17 | 54 |
| | | | | |
| *- Hotel (5 star/luxury)* | * | * | 1 | - |
| *- Hotel (4 star)* | *3* | 4 | 3 | 2 |
| *- Hotel (3 star)* | *28* | 22 | 13 | 52 |
| *- Hotel (1-2 star)* | *1* | 1 | - | * |
| | | | | |
| Self-catering | 19 | 24 | 16 | 9 |
| Guest house/B&B | 18 | 22 | 9 | 15 |
| Staying with friends/family | 12 | 5 | 53 | 2 |
| Hostel | 8 | 10 | 4 | 5 |
| Workers' accommodation on-site/rig | 4 | - | - | 15 |
| Tent at serviced campsite | 3 | 5 | 2 | - |
| Caravan pitch - serviced campsite | 2 | 3 | - | * |
| Motorhome (non-campsite) | 2 | 2 | 1 | * |
| Tent (non-campsite) | 1 | 2 | 1 | - |
| Motorhome at serviced campsite | 1 | 2 | - | - |
| Second home | 1 | 2 | 2 | * |
| Other | 4 | 3 | 4 | 3 |

Accommodation preferences were quite consistent across the research period with the exception of January-March when hotel usage peaked and self-catering decreased, reflecting a higher proportion of business respondents and lower proportion of holiday respondents in this period.

**Table 10.2: Accommodation during visit - by quarter**
**Base: face-to-face respondents staying overnight (1,171)**

| | **Q1 %** Oct-Dec | **Q2 %** Jan-Mar | **Q3 %** Apr-Jun | **Q4 %** Jul-Sep |
|---|---|---|---|---|
| Hotel (all) | 35 | 43 | 30 | 31 |
| Self-catering | 25 | 8 | 23 | 17 |
| Guest house/B&B | 12 | 19 | 16 | 20 |
| Staying with friends/family | 13 | 18 | 10 | 13 |
| Hostel | 5 | 7 | 10 | 8 |

*10.1.2 Accommodation during visit – comparison with previous visitor surveys*

The use of hotels has increased from 23% in 2009 to 32% in 2013, mainly due to an increase in business usage. There appears to have been a decrease in visitors using guest houses/B&Bs, although the extent of the decrease is unclear due to methodological differences in recording the data.

VFR visitors were less likely to actually stay with their friends/relatives in 2013 than in 2009 and 2005: as shown in Table 10.3 they were more likely to stay in self-catering or hotel accommodation.

**Table 10.3: Accommodation during visit - comparison with previous visitor surveys**
**Base: respondents staying overnight – 2013/ all respondents – 2009/2005**

| | **2013** | **2009** | **2005** |
|---|---|---|---|
| Number of respondents | 1171 | 1149 | 1273 |
| | % | % | % |
| Hotel (all) | 32 | 23 | 27 |
| Self-catering | 19 | 19 | 16 |
| Guest house | 18* | 7 | 4 |
| B&B | | 19 | 21 |
| Staying with friends/family | 12 | 20 | 23 |
| Hostel | 8 | 8 | 7 |
| Workers' accommodation on-site/rig | 4 | n/a | n/a |
| Tent at serviced campsite | 3 | 3 | 3 |
| Caravan pitch - serviced campsite | 2 | 2 | 3 |
| Motorhome | 3 | n/a | n/a |
| Tent (non-campsite) | 1 | 2 | n/a |
| Second home | 1 | 0 | n/a |
| Other | 4 | 4 | n/a |

* this was one code in the 2013 survey

### 10.2 Booking Accommodation

Respondents used a variety of methods to book their accommodation.

- Provider websites were most likely to be used by holiday respondents (29%) compared to VFR (14%) and business (4%)
- Provider by telephone was used almost equally by all respondent types.
- Almost half of business respondents (49%) had someone else book their accommodation
- 50% of VFR respondents did not need to book, reflecting the high proportion staying with friends/family

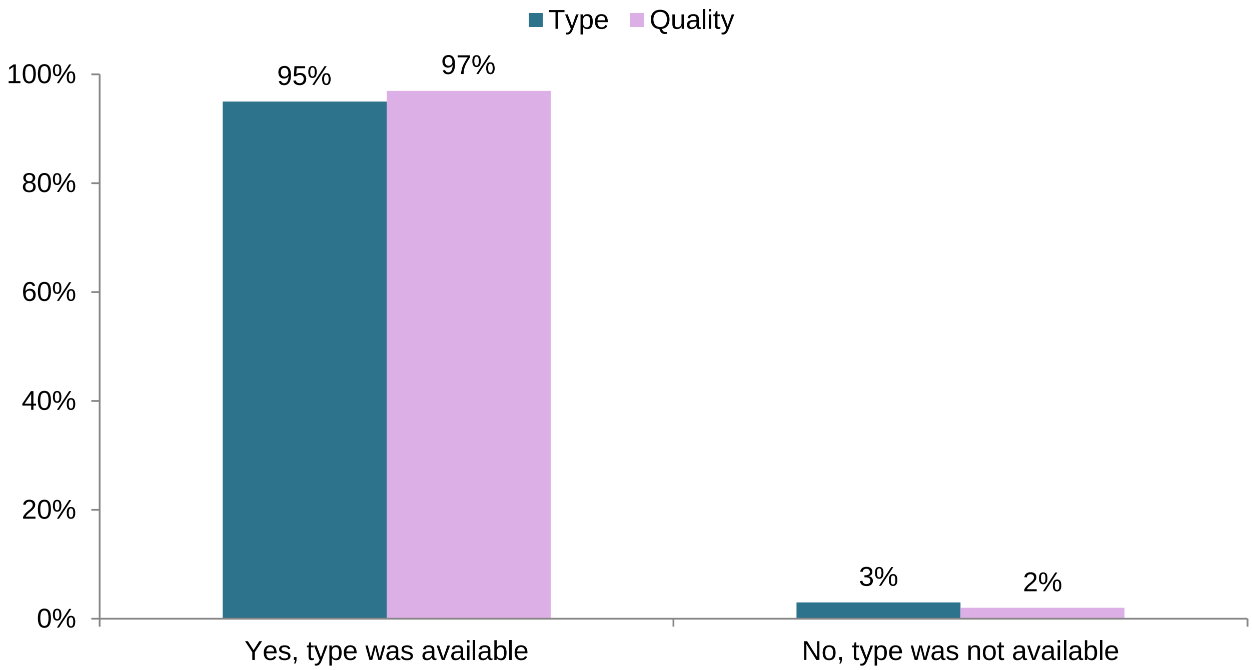
**Table 10.4: Accommodation booking methods**
**Base: all face-to-face respondents (1,328)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Providers' website | 20 | 29 | 14 | 4 |
| Provider by telephone | 17 | 18 | 15 | 18 |
| Someone booked on my behalf | 16 | 5 | 5 | 49 |
| Did not need to book | 14 | 8 | 50 | 3 |
| Provider by email | 7 | 9 | 5 | 3 |
| Did not book in advance | 6 | 9 | 2 | 1 |
| visitscotland.com | 4 | 6 | 2 | 1 |
| Internet Travel Agent e.g. Expedia | 4 | 4 | 2 | 3 |
| VIC office | 1 | 2 | 1 | - |
| High Street Travel Agent | 1 | 1 | - | 1 |
| Tour/travel company website | 1 | 1 | 1 | 2 |
| Other | 4 | 4 | 2 | 6 |

### 10.3 Type and Quality of Accommodation

The vast majority of respondents who stayed overnight in 'paid for' accommodation felt both the type and quality of accommodation they wanted were available. Respondents on holiday or VFR were most likely to agree with the statements whilst business respondents, although still very positive, were slightly less likely to agree.

**Chart 10.1: Availability of type/quality accommodation**
**Base: face-to-face respondents staying overnight in paid accommodation (856)**




All respondents were likely to agree with the statements about the type and quality of accommodation available, suggesting the current accommodation offering appeals to a variety of visitors.

**Table 10.5: Availability of type/quality accommodation**
**Base: face-to-face respondents staying overnight in paid accommodation (856)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Yes, type was available | 95 | 97 | 99 | 92 |
| Yes, quality was available | 97 | 97 | 99 | 95 |

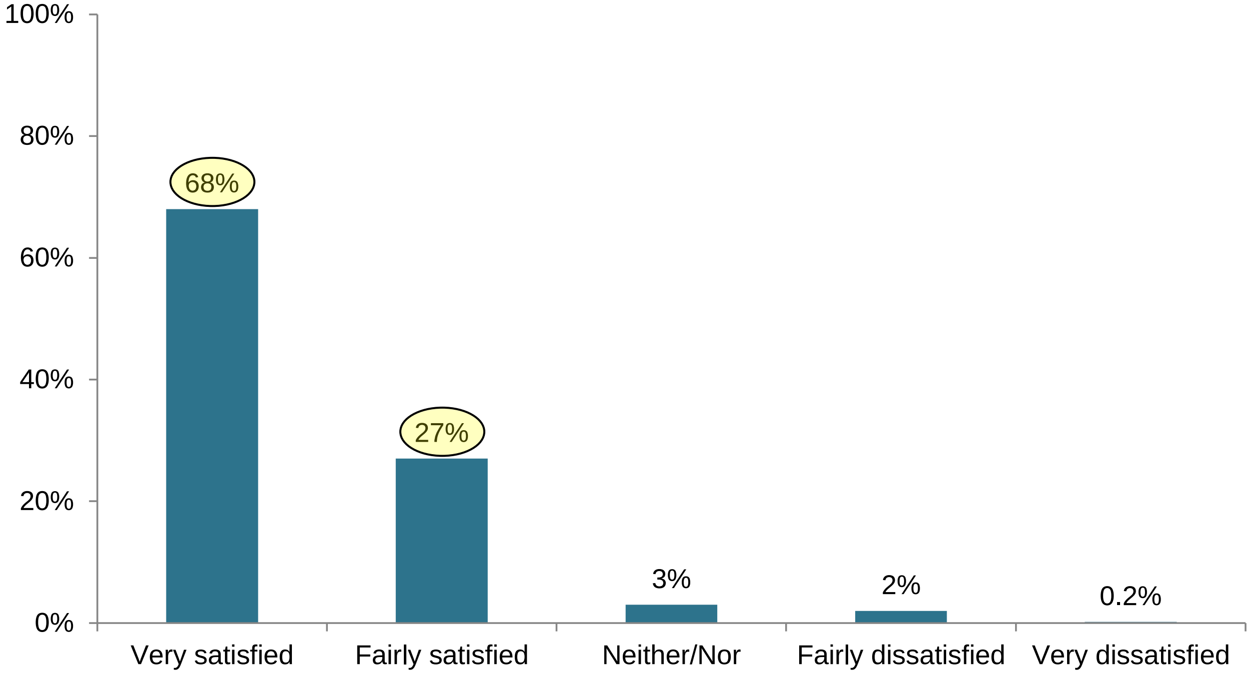
## 10.4 Satisfaction with Accommodation

*10.4.1 Quality of accommodation*

Respondents displayed high levels of satisfaction with the quality of accommodation they had experienced, with over two-thirds very satisfied and a quarter fairly satisfied resulting in 95% satisfaction overall (very or fairly).

By accommodation type, 83% of respondents staying in self-catering accommodation were very satisfied with the quality whilst for respondents in guest houses/B&Bs the figure was 75% and for hotel guests (47%).

**Chart 10.2: Satisfaction with quality of accommodation**
**Base: online respondents who rated quality of accommodation (525)**




Business respondents, although still satisfied overall were markedly less likely to be *very* satisfied, compared to holiday and VFR respondents. Dissatisfaction levels were low,.

**Table 10.6: Satisfaction with quality of accommodation - total and by type of visit**
**Base: online respondents who rated quality of accommodation (525)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 68 | 71 | 86 | 47 |
| Fairly satisfied | 27 | 24 | 9 | 47 |
| Neither/Nor | 3 | 2 | 5 | 2 |
| Fairly dissatisfied | 2 | 2 | - | 4 |
| Very dissatisfied | * | * | - | - |
| | | | | |
| Mean score (out of 5) | 4.60 | 4.64 | 4.82 | 4.38 |

Comments on the reasons for dissatisfaction with the quality of accommodation focussed on issues specific to the hotel or bed and breakfast respondents stayed in. Comments from individuals mentioned issues such as noise, dirty rooms, no hot water and overpricing.

*"The standard of the room did not justify the price."*

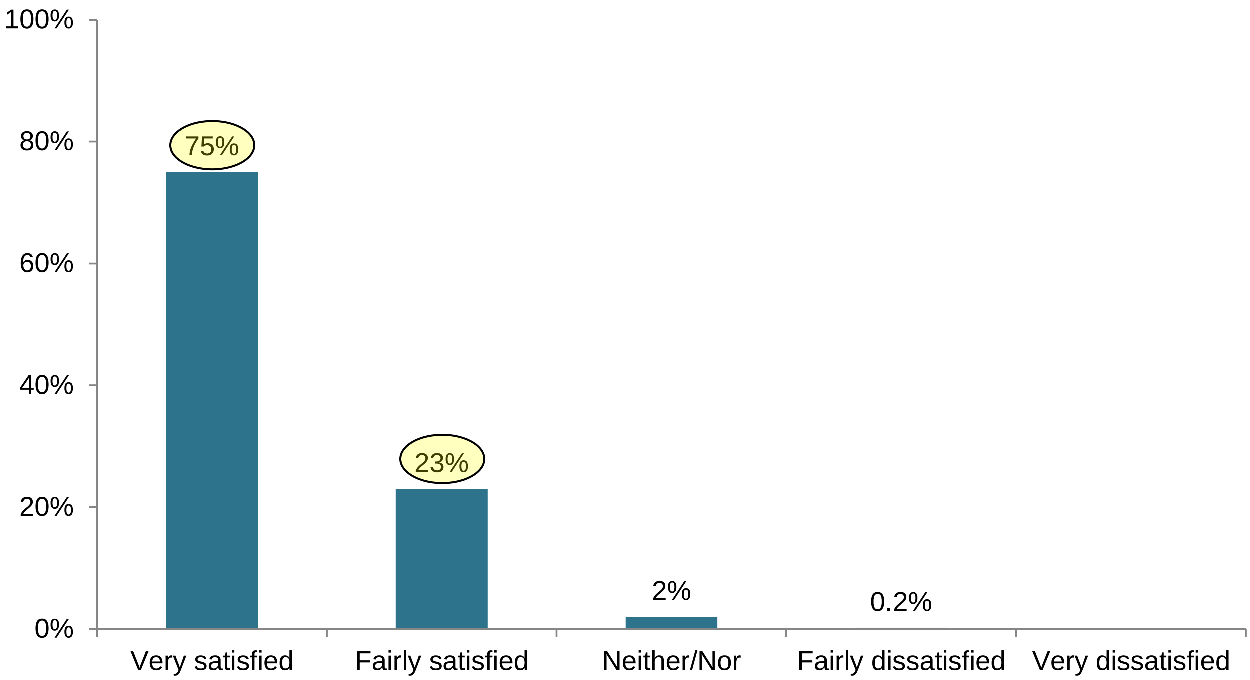
*Noisy, no ventilation, detached bathrooms. All round quite ordinary."*

*10.4.2 Friendly and efficient service*

There were very high levels of satisfaction with the friendly and efficient service that respondents had experienced in their accommodation, with three quarters very satisfied and nearly a quarter quite satisfied, resulting in 98% satisfaction overall (very or fairly).

Respondents staying in self-catering accommodation were most satisfied with the friendly and efficient service (84% very satisfied) closely followed by guest house/B&B guests (82%) whilst the comparable figure for hotel guests was only 56%.

**Chart 10.3: Satisfaction with friendly and efficient service**
**Base: online respondents who rated friendly and efficient service (505)**



All types of visitor displayed high levels of satisfaction with the friendly and efficient service but as with quality of accommodation (see 10.4.1) business respondents tended to be slightly more muted in their levels of satisfaction. Dissatisfaction levels were negligible (less than 1%).

**Table 10.7: Satisfaction with friendly and efficient service - total and by type of visit**
**Base: online respondents who rated friendly and efficient service (505)**

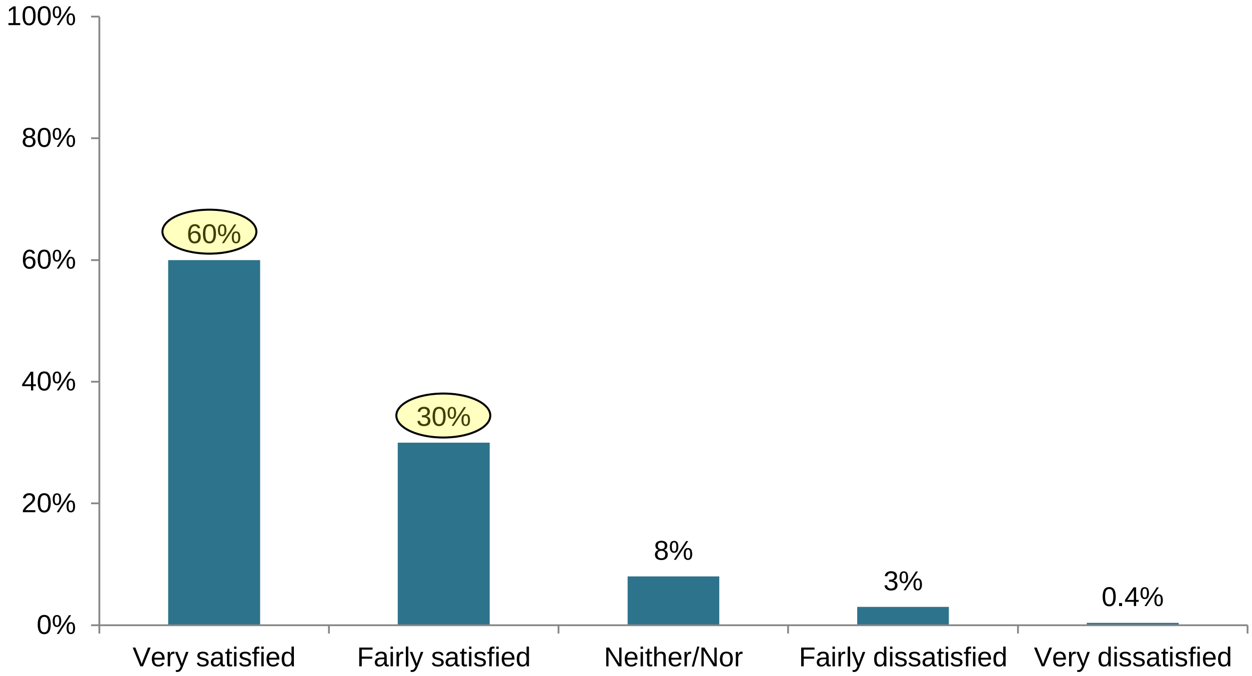
| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 75 | 77 | 81 | 62 |
| Fairly satisfied | 23 | 21 | 19 | 35 |
| Neither/Nor | 2 | 2 | - | 4 |
| Fairly dissatisfied | * | * | - | - |
| Very dissatisfied | - | - | - | - |
| | | | | |
| Mean score (out of 5) | 4.72 | 4.74 | 4.81 | 4.58 |

*10.4.3 Value for money of accommodation*

Overall, 90% of respondents were very (60%) or fairly (30%) satisfied with the value for money of the accommodation they had used. Dissatisfaction levels were low.

73% of respondents staying in self-catering accommodation were very satisfied with the value for money they had encountered compared to 67% of guest house/B&B guests and 36% of hotel guests.

**Chart 10.4: Satisfaction with value for money of accommodation**
**Base: online respondents who rated value for money of accommodation (507)**



Once again it was business respondents who were slightly less satisfied overall with this element of accommodation, with a smaller proportion of these respondents very satisfied with the value for money of accommodation. Where dissatisfaction was evident, it was most apparent among this group.

**Table 10.8: Satisfaction with value for money of accommodation - total and by type of visit**
**Base: online respondents who rated value for money of accommodation (507)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 60 | 62 | 73 | 41 |
| Fairly satisfied | 30 | 28 | 23 | 36 |
| Neither/Nor | 8 | 6 | 5 | 16 |
| Fairly dissatisfied | 3 | 2 | - | 7 |
| Very dissatisfied | * | 1 | - | - |
| | | | | |
| Mean score (out of 5) | 4.46 | 4.50 | 4.68 | 4.12 |

The main reason for dissatisfaction with the value for money of accommodation was that accommodation was perceived as 'overpriced' in terms of quality of facilities.

*"It was too expensive for what it was. It was more like a B&B."*

*"Thought room was overpriced compared with similar standard of accommodation elsewhere."*

### 10.5 Accommodation – Island Comparisons

Accommodation patterns on the three locations showed consistency:

- Business respondents were most likely to be staying in hotel accommodation with over half doing so on Orkney and the Outer Hebrides (54%) compared to 43% on Shetland
- 17% of VFR respondents on Orkney stayed in hotels, but just 6% (the Outer Hebrides) and 4% (Shetland) did so. VFR respondents were more likely to stay with friends/relatives - Shetland (75%) and the Outer Hebrides (66%) with fewer doing so on Orkney (53%)
- Usage of guest house/B&B and self-catering options were similar on each location with between a fifth and a quarter of holiday respondents using these forms of accommodation on each island

**Table 10.9: Accommodation during visit**
**Base: face-to-face respondents staying overnight**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % |
| Hotel (all) | 27 | 17 | 54 | | 24 | 6 | 54 | | 27 | 4 | 43 |
| | | | | | | | | | | | |
| *- Hotel (5 star/luxury)* | * | *1* | - | | *1* | - | - | | - | - | - |
| *- Hotel (4 star)* | *4* | *3* | *2* | | *7* | *1* | *9* | | *2* | * | *2* |
| *- Hotel (3 star)* | *22* | *13* | *52* | | *13* | *4* | *29* | | *25* | *4* | *39* |
| *- Hotel (1-2 star)* | *1* | - | * | | *3* | *2* | *16* | | * | - | *2* |
| | | | | | | | | | | | |
| Staying with friends/family | 5 | 53 | 2 | | 6 | 66 | 3 | | 16 | 75 | 4 |
| Guest house/B&B | 22 | 9 | 15 | | 28 | 7 | 27 | | 22 | 8 | 14 |
| Self-catering | 24 | 16 | 9 | | 24 | 14 | 7 | | 19 | 9 | 7 |
| Hostel | 10 | 4 | 5 | | 5 | - | 1 | | 11 | 1 | 3 |
| Workers' accommodation | - | - | 15 | | - | - | 2 | | * | 1 | 20 |
| Second home | 2 | 2 | * | | 5 | 5 | 2 | | 2 | 1 | 2 |
| Tent at serviced campsite | 5 | 2 | - | | 8 | 1 | - | | 2 | - | - |
| Motorhome (non-campsite) | 2 | 1 | * | | 4 | 3 | - | | * | * | - |
| Tent (non-campsite) | 2 | 1 | - | | 4 | * | - | | 1 | - | - |
| Motorhome at serviced campsite | 2 | - | - | | 4 | 2 | - | | * | * | * |
| Camping bod | - | - | - | | - | - | - | | 8 | * | - |
| Caravan pitch - serviced campsite | 3 | - | * | | 1 | - | - | | * | - | - |

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Inn | - | - | - | 1 | - | 1 | - | - | - |
| Static caravan | - | - | - | 1 | - | - | - | * | - |
| Restaurant with rooms | - | - | - | * | - | * | - | - | - |
| Other | 3 | 4 | 3 | 3 | 2 | 6 | 2 | - | 9 |

Booking methods varied by respondent type but the behaviour of respondents was similar in each location:

- A high proportion of VFR respondents on each location did not book as they were staying with friends/relatives
- Up to half of business respondents (Orkney and Shetland) had someone book accommodation on their behalf
- Booking via telephone was almost equally likely for holiday, VFR and business respondents on Orkney, but on the Outer Hebrides VFR respondents were much less likely to use this form of booking and on Shetland both VFR and business respondents were less likely to use it
- Holiday respondents in Shetland were much less likely to book by providers website (6%) compared to Orkney and the Outer Hebrides (both 29%). In contrast, holiday respondents on Shetland were much more likely than elsewhere (22%) to book with providers by email – Orkney (9%), the Outer Hebrides (13%)

**Table 10.10: Accommodation booking methods**
**Base: all face-to-face respondents**

| | Orkney | | | Outer Hebrides | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|
| | Holiday % | VFR % | Business % | Holiday % | VFR % | Business % | Holiday % | VFR % | Business % |
| Did not need to book | 8 | 50 | 3 | 16 | 70 | 5 | 17 | 66 | 4 |
| Someone booked on my behalf | 5 | 5 | 49 | 6 | 2 | 37 | 8 | 4 | 51 |
| Provider by telephone | 18 | 15 | 18 | 21 | 8 | 18 | 16 | 7 | 4 |
| Providers’ website | 29 | 14 | 4 | 29 | 10 | 8 | 6 | 2 | 2 |
| Provider by email | 9 | 5 | 3 | 13 | 3 | 2 | 22 | 5 | 4 |
| Did not book in advance | 9 | 2 | 1 | 12 | 3 | 1 | 7 | 2 | 3 |
| Internet Travel Agent e.g. Expedia | 4 | 2 | 3 | 3 | 1 | 4 | 3 | - | 2 |
| visitscotland.com | 6 | 2 | 1 | 3 | * | 1 | 2 | * | 1 |
| VIC office | 2 | 1 | - | 2 | 1 | 1 | 2 | - | - |
| Tour/travel company website | 1 | 1 | 2 | 2 | * | * | 1 | - | 1 |
| High Street Travel Agent | 1 | - | 1 | 1 | - | 1 | * | - | * |
| Other | 4 | 2 | 6 | 6 | 1 | 5 | 14 | 6 | 9 |

A comparison with mean scores on satisfaction with accommodation highlights the following:

- VFR respondents, especially on Orkney, displayed high levels of satisfaction with their accommodation
- In contrast it was business respondents on each location who showed the lowest levels of satisfaction, especially on Shetland

**Table 10.11: Satisfaction with accommodation**
**Base: online respondents who rated accommodation**

| | Orkney | | | Outer Hebrides | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|
| | **Holiday** | **VFR** | **Business** | **Holiday** | **VFR** | **Business** | **Holiday** | **VFR** | **Business** |
| | Mean score (out of 5) | | | Mean score (out of 5) | | | Mean score (out of 5) | | |
| Satisfaction with quality of accommodation | 4.64 | 4.82 | 4.38 | 4.63 | 4.47 | 4.22 | 4.58 | 4.80 | 3.84 |
| Satisfaction with friendly and efficient service | 4.74 | 4.81 | 4.58 | 4.75 | 4.78 | 4.52 | 4.63 | 4.80 | 4.46 |
| Satisfaction with value for money of accommodation | 4.50 | 4.68 | 4.12 | 4.37 | 4.00 | 4.13 | 4.38 | 4.20 | 3.56 |

## 11. ATTRACTIONS AND ACTIVITIES

### 11.1 Attractions – Aware of and Visited

Table 11.1 displays a range of attractions and highlights whether respondents had a) awareness of them before their visit, and b) visited them on their current trip. The table divides the attractions into area and ranks them according to most-least visited. It should be noted that these results do not represent overall visitor levels to these attractions but highlight which respondents were aware of and where they visited.

In terms of awareness before their visit, Skara Brae (66%), Highland Park Distillery (64%), Lamb Holm - Italian Chapel (63%) and St Magnus Cathedral (61%) were all known to more than three-fifths of respondents, and in general respondents were aware of a wide range of local attractions prior to their visit.

Overall, Stenness - Ring of Brodgar (70%) was the attraction most likely to be visited by respondents with Skara Brae (68%), Stenness - Standing Stones (67%) and St Magnus Cathedral (67%) also visited by more than two-thirds of respondents.

**Table 11.1: Attractions aware of and visited**
**Base: online respondents who had visited attractions (748)**

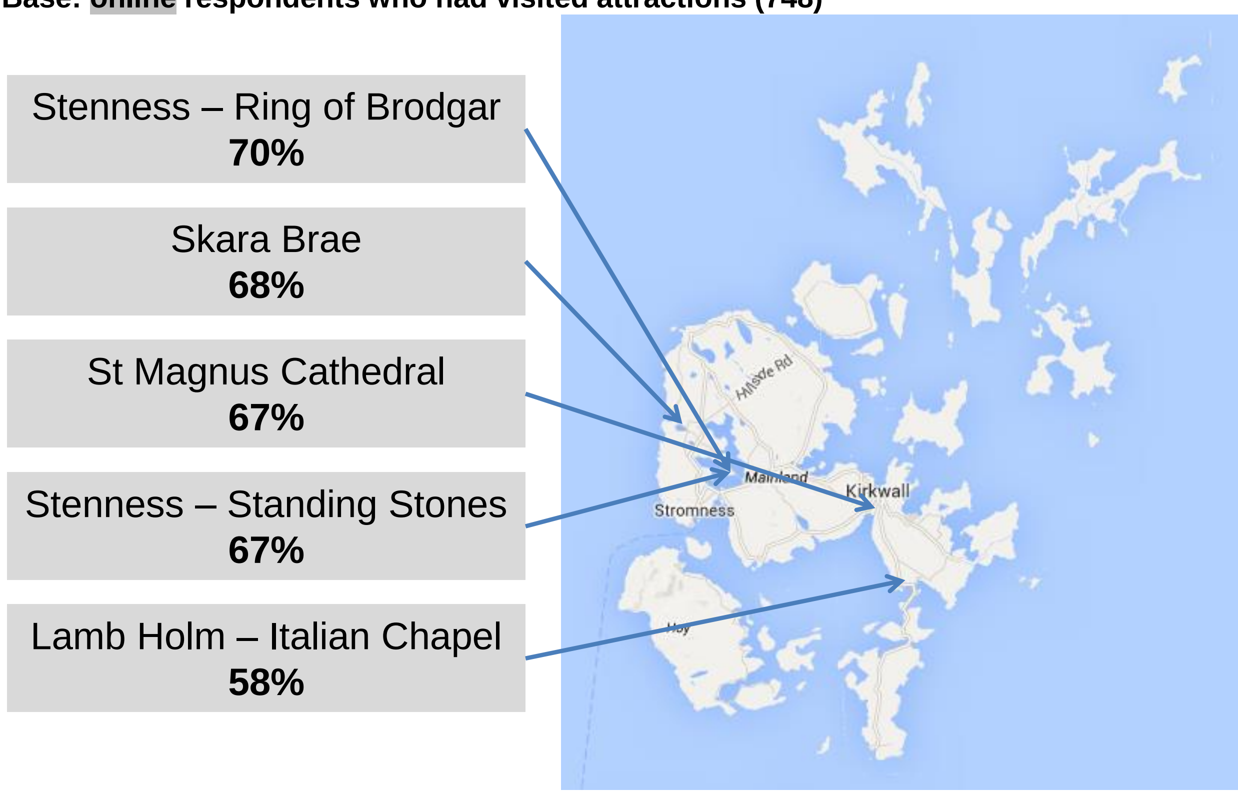
| | Aware of (before visit) % | Visited % |
|---|---|---|
| **Kirkwall** | | |
| St Magnus Cathedral | 61 | 67 |
| Bishop's Palace and/or Earl's Palace | 52 | 34 |
| Orkney Museum | 54 | 25 |
| Highland Park Distillery | 64 | 22 |
| Pickaquoy Centre | 37 | 15 |
| Ortak Visitor Centre | 40 | 12 |
| Orkney Wireless Museum | 44 | 6 |
| | | |
| **Stromness** | | |
| Stromness Museum | 52 | 20 |
| Pier Arts Centre | 35 | 19 |
| Ness Battery | 39 | 12 |
| | | |
| **East Mainland, Burray/South Ronaldsay** | | |
| Lamb Holm - Italian Chapel | 63 | 58 |
| South Ronaldsay - Tomb of the Eagle | 57 | 25 |
| Burray - Fossil and Vintage Centre | 38 | 17 |
| Sheila Fleet Visitor Centre | 31 | 8 |
| South Ronaldsay - Marine Life Aquarium | 30 | 2 |
| South Ronaldsay - Smithy Museum | 23 | 2 |

**Table 11.1: Attractions aware of and visited *(Continued)***
**Base: online respondents who had visited attractions (748)**

| | Aware of (before visit) % | Visited % |
|---|---|---|
| **West Mainland** | | |
| Stenness – Ring of Brodgar | 59 | 70 |
| Skara Brae | 66 | 68 |
| Stenness - Standing Stones | 59 | 67 |
| Brough of Birsay | 45 | 45 |
| Stenness - Maeshowe | 56 | 41 |
| Sandwick - Skaill House | 48 | 39 |
| Evie - Broch of Gurness | 38 | 28 |
| Birsay - Earl's Palace | 44 | 26 |
| Marwick Head | 34 | 19 |
| Quoyloo - Orkney Brewery Visitor Centre | 35 | 17 |
| Birsay - Kirbuster Museum | 27 | 8 |
| Harray - Corrigall Museum | 21 | 3 |

The five most visited attractions covered a reasonably wide area of Orkney and fifteen (out of 28) attractions were visited by 20% or more of respondents.

**Chart 11.1: Top 5 attractions visited**
**Base: online respondents who had visited attractions (748)**



As one might expect it is holiday respondents who displayed the highest propensity to visit attractions with four-fifths or more visiting Stenness – Ring of Brodgar and Skara Brae. Visit levels were lower amongst VFR respondents and especially business respondents, though nearly half of business respondents had visited St Magnus Cathedral.

**Table 11.2: Top 5 attractions visited - total and by type of visit**
**Base: online respondents who had visited attractions (748)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Stenness - Ring of Brodgar | 70 | 80 | 47 | 24 |
| Skara Brae | 68 | 83 | 32 | 16 |
| St Magnus Cathedral | 67 | 71 | 51 | 45 |
| Stenness - Standing Stones | 67 | 78 | 41 | 16 |
| Lamb Holm - Italian Chapel | 58 | 64 | 36 | 39 |

### 11.2 Activities Undertaken

Table 11.3 displays a range of activities and highlights all the activities respondents had undertaken during their visit and also their main activity. The table is ranked by main activity.

Respondents undertook a range of activities with visiting beaches/coastal scenery (64%), archaeological sites (63%), short walks (59%), trying local food (54%) and shopping for local crafts/products (52%) all popular with more than half of respondents. The most common main activity related to archaeological sites, undertaken by over a quarter of respondents (28%), whilst general sightseeing was the main activity for just over a tenth.

**Table 11.3: Activities undertaken – All and main activities**
**Base: all online respondents (821)**

| | All activities % | Main activity % |
|---|---|---|
| Archaeological sites | 63 | 28 |
| General sightseeing/tour | 37 | 11 |
| Longer walks - over 2 miles | 36 | 8 |
| Beaches/coastal scenery | 64 | 7 |
| Short walk - up to 2 miles | 59 | 4 |
| Trying local food | 54 | 4 |
| Bird watching | 33 | 4 |
| Photography/painting | 28 | 3 |
| Shopping for local crafts/products | 52 | 2 |
| Guided tour | 18 | 2 |
| Visiting Festivals or events | 10 | 2 |
| Cycling on a road/surfaced path | 8 | 2 |
| Special event - personal e.g. wedding | 5 | 2 |
| Viewpoints/picnic areas | 38 | 1 |
| Nature/wildlife sites | 32 | 1 |
| Other shopping | 27 | 1 |
| Visits to local leisure centres | 12 | 1 |
| Family history/genealogy research | 6 | 1 |
| Loch fishing | 2 | 1 |
| Golf | 2 | 1 |

**Table 11.3: Activities undertaken – All and main activities *(Continued)***
**Base: all online respondents (821)**

| | | |
|---|---|---|
| Diving | 2 | 1 |
| Geological sites | 24 | * |
| Other nature watching (flora/fauna) | 22 | * |
| Marine wildlife watching | 21 | * |
| Listening to traditional music | 12 | * |
| Musical entertainment/activities | 10 | * |
| Knitting/textiles | 6 | * |
| Sea angling | 2 | * |
| Sailing | 2 | * |
| Kayaking | 1 | * |
| Water sports | 1 | * |
| Other sporting activity | 1 | * |
| Rock climbing | * | * |
| Mountain biking | 1 | - |

As with visiting attractions, it is holiday respondents who are most likely to undertake activities, with four-fifths visiting archaeological sites and nearly three-quarters taking in beaches/coastal scenery. Around half or more of VFR respondents also engaged in these activities but the pattern amongst business respondents is very mixed with just 7% visiting archaeological sites during their visit.

**Table 11.4: All activities undertaken (top 5) - total and by type of visit**
**Base: all online respondents (821)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Beaches/coastal scenery | 64 | 73 | 67 | 15 |
| Archaeological sites | 63 | 80 | 48 | 7 |
| Short walk - up to 2 miles | 59 | 66 | 66 | 21 |
| Trying local food | 54 | 57 | 51 | 36 |
| Shopping for local crafts/products | 52 | 56 | 53 | 22 |

### 11.3 Attractions and Activities – Island Comparisons

Respondents on all three locations undertook a wide range of activities during their visits:

- On Orkney, holiday respondents were most likely to visit archaeological sites, VFR respondents were most likely to visit beaches/coastal areas and business respondents were most likely to try local food.
- On the Outer Hebrides, holiday and VFR respondents were most likely to visit beaches/coastal areas whilst business respondents were most likely to take short walks
- On Shetland, all visitor types were most likely to take short walks during their visit
- Bird watching and nature/wildlife sites were more common activities for holiday respondents on Shetland than those on Orkney or the Outer Hebrides
- Likewise, Shetland holiday and VFR respondents were more likely to take part in musical entertainment/activities or visit festivals or events

**Table 11.5: Activities undertaken – All**
**Base: all online respondents**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % |
| Beaches/coastal scenery | 73 | 67 | 15 | | 87 | 73 | 18 | | 72 | 68 | 15 |
| Short walk - up to 2 miles | 66 | 66 | 21 | | 73 | 65 | 24 | | 73 | 74 | 25 |
| Shopping for local crafts/products | 56 | 53 | 22 | | 50 | 49 | 20 | | 56 | 55 | 20 |
| Trying local food | 57 | 51 | 36 | | 55 | 46 | 23 | | 50 | 39 | 21 |
| Longer walks - over 2 miles | 40 | 40 | 7 | | 50 | 39 | 8 | | 56 | 40 | 8 |
| Viewpoints/picnic areas | 45 | 36 | 6 | | 55 | 41 | 4 | | 48 | 39 | 9 |
| Archaeological sites | 80 | 48 | 7 | | 44 | 20 | 4 | | 57 | 16 | 4 |
| General sightseeing/tour | 42 | 40 | 9 | | 52 | 35 | 9 | | 44 | 35 | 8 |
| Bird watching | 39 | 30 | 5 | | 37 | 20 | 3 | | 52 | 37 | 11 |
| Nature/wildlife sites | 41 | 25 | 2 | | 39 | 18 | 4 | | 53 | 32 | 7 |
| Other shopping | 27 | 35 | 13 | | 22 | 39 | 8 | | 22 | 34 | 12 |
| Photography/painting | 34 | 17 | 6 | | 39 | 28 | 6 | | 36 | 23 | 7 |
| Marine wildlife watching | 25 | 18 | 2 | | 29 | 16 | 2 | | 39 | 23 | 6 |
| Other nature watching (flora/fauna) | 27 | 22 | 3 | | 28 | 15 | 1 | | 32 | 19 | 4 |
| Visits to local leisure centres | 11 | 21 | 8 | | 10 | 22 | 2 | | 18 | 31 | 5 |
| Geological sites | 30 | 20 | 1 | | 18 | 10 | 1 | | 28 | 8 | 2 |

**Table 11.5: Activities undertaken – All *(Continued)***
**Base: all online respondents**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % | | Holiday % | VFR % | Business % |
| Listening to traditional music | 12 | 10 | 4 | | 11 | 20 | 4 | | 19 | 21 | 4 |
| Musical entertainment/activities | 10 | 11 | 4 | | 5 | 14 | 2 | | 15 | 29 | 4 |
| Visiting Festivals or events | 8 | 10 | 2 | | 5 | 7 | 1 | | 19 | 21 | 4 |
| Knitting/textiles | 7 | 4 | - | | 12 | 9 | 1 | | 17 | 15 | - |
| Guided tour | 23 | 9 | 3 | | 2 | - | 1 | | 14 | 3 | 1 |
| Cycling on a road/surfaced path | 10 | 4 | 1 | | 12 | 8 | 3 | | 8 | 5 | 1 |
| Special event - e.g. wedding | 3 | 15 | - | | 2 | 7 | - | | 1 | 18 | - |
| Family history/genealogy research | 6 | 7 | 2 | | 5 | 12 | - | | 4 | 10 | - |
| Sea angling | 2 | 5 | 1 | | 6 | 9 | 1 | | 2 | 2 | 2 |
| Loch fishing | 1 | 3 | - | | 7 | 11 | - | | 2 | 3 | 1 |
| Golf | 2 | 3 | 4 | | 3 | 4 | 1 | | - | 2 | - |
| Diving | 2 | 1 | 2 | | 1 | 3 | - | | - | 6 | 1 |
| Other sporting activity | 1 | 2 | 2 | | 2 | 3 | 2 | | 1 | 2 | 1 |
| Kayaking | 1 | - | 1 | | 4 | 6 | 2 | | 1 | - | - |
| Sailing | 1 | 5 | 1 | | 1 | 4 | - | | 1 | - | - |
| Water sports | 1 | 1 | - | | 5 | 4 | - | | - | - | - |
| Mountain biking | 2 | - | - | | 3 | 3 | - | | 1 | 2 | - |
| Rock climbing | * | 1 | 1 | | 1 | 3 | - | | 1 | - | 2 |

# 12. SATISFACTION WITH VISIT

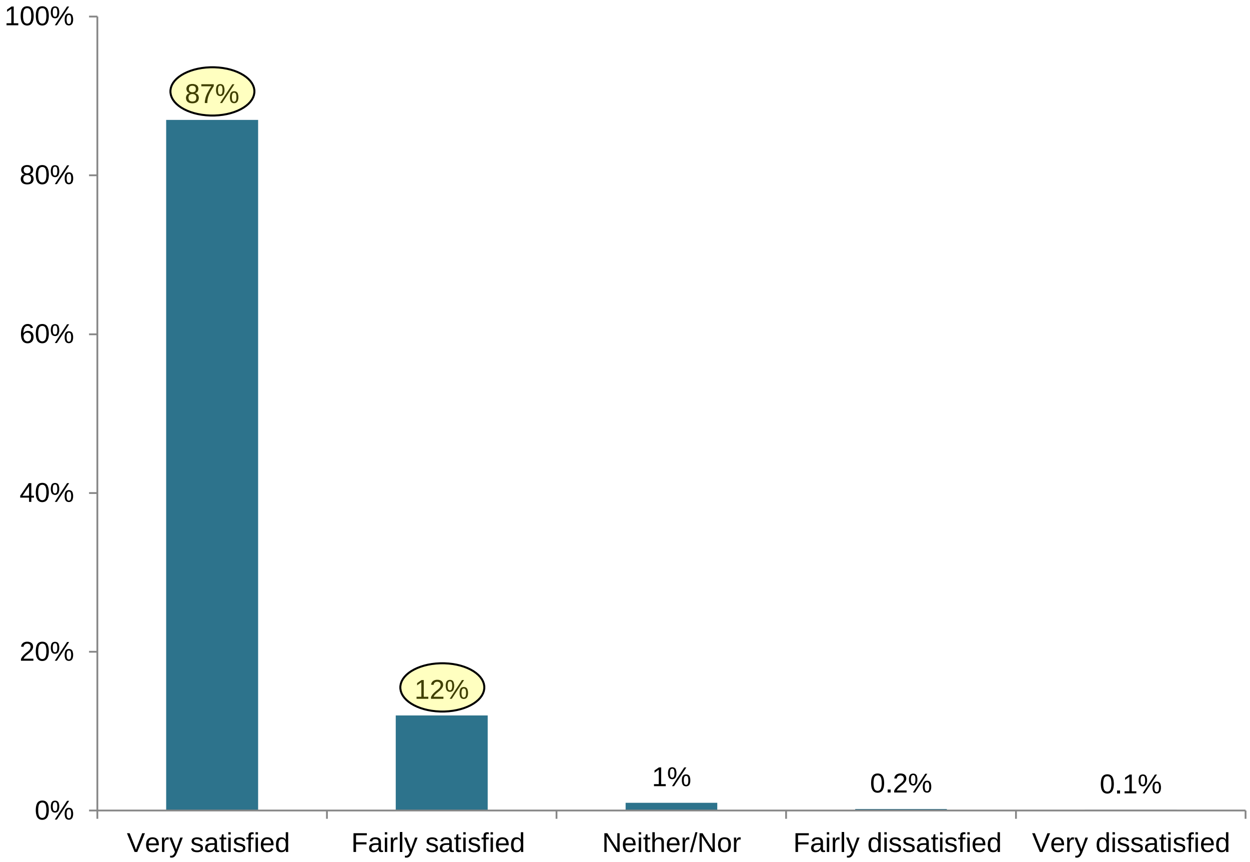
## 12.1 Overall Satisfaction

*12.1.1 Satisfaction – overall*

Respondents' overall satisfaction with their visit was very high, with 99% stating that they were satisfied and 87% very satisfied. High levels of satisfaction were displayed by respondents of all ages and residences.

Overall satisfaction levels equate to a mean score of 4.86 (out of 5).

**Chart 12.1: Overall satisfaction with visit**
**Base: all face-to-face respondents (1,328)**



Satisfaction amongst holiday and VFR respondents was particularly high (over 90% very satisfied). Most business respondents were also satisfied although fewer (76%) were very satisfied.

**Table 12.1: Overall satisfaction with visit – by visitor type**
**Base: all face-to-face respondents (1,328)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very satisfied | 87 | 91 | 93 | 76 |
| Fairly satisfied | 12 | 9 | 7 | 21 |
| Neither/Nor | 1 | * | - | 3 |
| Fairly dissatisfied | * | * | - | * |
| Very dissatisfied | * | * | - | - |
| | | | | |
| Mean score (out of 5) | 4.86 | 4.90 | 4.93 | 4.72 |

Satisfaction levels, whilst high throughout the research period, were particularly positive between April-September compared to October-March.

**Table 12.2: Overall satisfaction with visit - by quarter**
**Base: all face-to-face respondents (1,328)**

| | Q1 % Oct-Dec | Q2 % Jan-Mar | Q3 % Apr-Jun | Q4 % Jul-Sep |
|---|---|---|---|---|
| Very satisfied | 80 | 78 | 90 | 88 |
| Fairly satisfied | 16 | 18 | 10 | 11 |
| Neither/Nor | 3 | 3 | - | 1 |
| Fairly dissatisfied | - | 1 | * | - |
| Very dissatisfied | 1 | - | - | - |
| | | | | |
| Mean score (out of 5) | 4.73 | 4.73 | 4.90 | 4.87 |

Comments on the highlights of visits far outweighed comments on areas of dissatisfaction, confirming the high levels of satisfaction amongst visitors.

For most people, the highlights were a mix of experiences and activities during their visit.

*Birdlife. Seals. Flight to North Ronaldsay great. Easy to speak to local people, very friendly."*

*"Fantastic walks. Wildlife. Skara Brae, St Magnus Cathedral, Stromness, Brodgar, Tomb of the Eagles."*

The **archaeological and historical sites** were key highlights in the visit:

*"Archaeology, Ness of Brodgar excavations, Skara Brae, Tomb of the Eagles, Brough of Birsay."*

*"Ability to relax, Landscape, Churchill Barriers, Standing Stones, Stromness, Neolithic sites."*

Visitors also highlighted **the friendliness of local people** and **good customer service.**

*"Excellent customer service and friendly staff."*

*"The beautiful landscapes, beaches, walks, but most of all how very friendly the people are."*

The **scenery and landscape** was important to many visitors

*"Scenery. Picturesque,changing of the landscape as you drive through.  Seeing islands."*

*"Cliff top walks, the scenery, the wildflowers and seabirds."*

Respondents were asked if there was any aspect of their visit they were not satisfied with.  The comments identified that the main areas of dissatisfaction related to:

- availability of cafes/restaurants

*"Difficult to find eateries at some times of day."*

*"Lack of cafes outside towns."*

- quality of accommodation

*"Accommodation not good.  Damp, run down."*

*"B & B not great – basic.  Food basic … variety could be better."*

- frequency and timing of buses

*"Bus did not meet flight (late). One taxi only. Link guided walks at Brodgar with bus arrivals. More joined up thinking."*

*Bus service to Skara Brae – bus map is poor."*

- poor signage

*"Signage is appalling – Brodgar to Skara Brae"*

*"Poor road signing from main road Kirkwall to Skara Brae."*

*12.1.2 Satisfaction – specific elements of visit*

Respondents provided satisfaction ratings on a range of specific visit elements. Results, ranked by mean score in table 12.3 show high overall levels of satisfaction, particularly on the quality of visitor attractions, with seven-tenths of respondents being very satisfied with these.

**Table 12.3: Satisfaction with specific elements of visit**
**Base: online respondents who rated specific elements of visit**

| | Very satisfied % | Fairly satisfied % | Neither/ Nor % | Fairly dissatisfied % | Very dissatisfied % | Mean score (Out of 5) |
|---|---|---|---|---|---|---|
| Quality of visitor attractions, historic sites, museums, visitor centres | 70 | 27 | 3 | * | - | 4.66 |
| Quality of local food and drink products | 49 | 41 | 9 | 1 | * | 4.38 |
| Availability of information locally about places to visit during trip | 48 | 41 | 9 | 1 | * | 4.36 |
| Value for money of visitor attractions, historic sites, museums, visitor centres | 47 | 41 | 11 | 1 | * | 4.32 |
| Quality of local arts and crafts products | 47 | 37 | 16 | * | - | 4.31 |
| Signposting | 39 | 44 | 12 | 3 | 2 | 4.16 |
| Availability of local produce when dining out | 37 | 44 | 14 | 3 | 1 | 4.14 |
| Value for money dining out | 30 | 53 | 14 | 2 | * | 4.11 |
| Value for money of local arts and crafts products | 28 | 45 | 24 | 2 | 1 | 3.99 |
| Opportunities to attend local events/ festivals | 34 | 32 | 32 | 2 | - | 3.96 |

In general, holiday and VFR respondents were likely to be most satisfied (as indicated by the blue highlighted mean scores), though business respondents were the group most satisfied with local food and drink products.

**Table 12.4: Satisfaction with specific elements of visit - by visitor type**
**Base: online respondents who rated specific elements of visit**

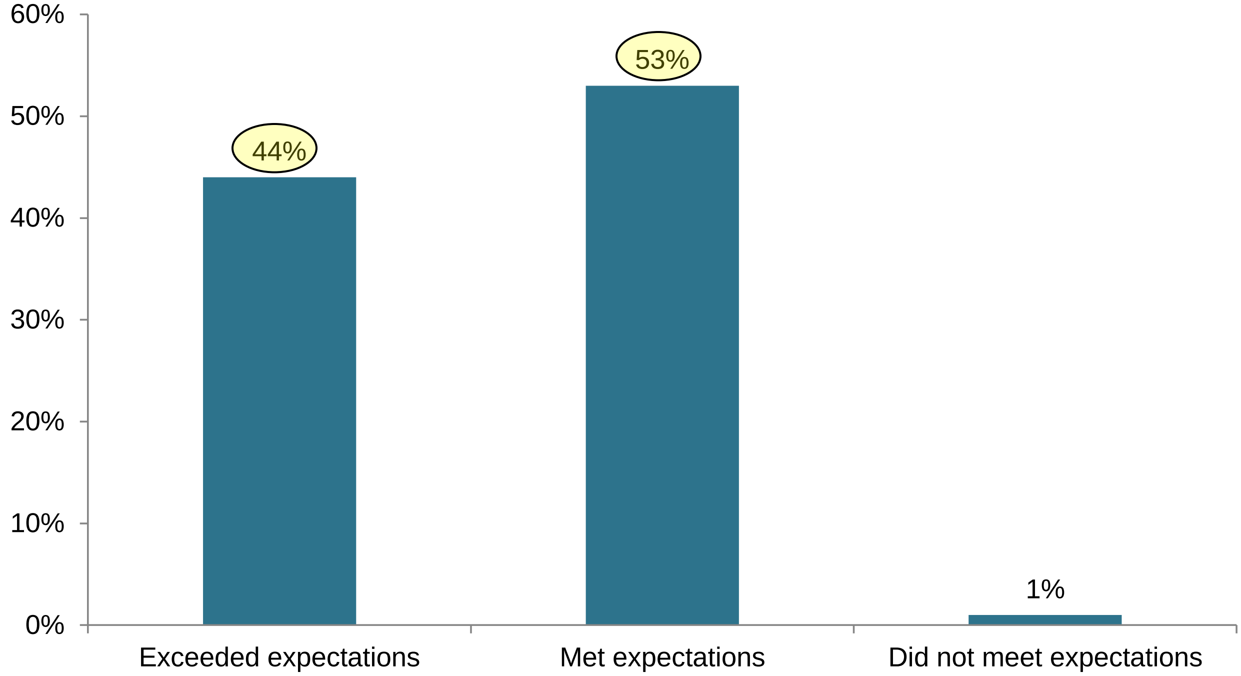
| | Total Mean score (Out of 5) | Holiday Mean score (Out of 5) | VFR Mean score (Out of 5) | Business Mean score (Out of 5) |
|---|---|---|---|---|
| Quality of visitor attractions, historic sites, museums, visitor centres | 4.66 | 4.71 | 4.58 | 4.38 |
| Quality of local food and drink products | 4.38 | 4.32 | 4.43 | 4.46 |
| Availability of information locally about places to visit during trip | 4.36 | 4.37 | 4.31 | 4.29 |
| Value for money of visitor attractions, historic sites, museums, visitor centres | 4.32 | 4.35 | 4.26 | 4.20 |
| Quality of local arts and crafts products | 4.31 | 4.28 | 4.40 | 4.18 |
| Signposting | 4.16 | 4.16 | 4.16 | 4.04 |
| Availability of local produce when dining out | 4.14 | 4.10 | 4.21 | 4.12 |
| Value for money dining out | 4.11 | 4.10 | 4.08 | 4.07 |
| Value for money of local arts and crafts products | 3.99 | 3.97 | 4.05 | 3.82 |
| Opportunities to attend local events/ festivals | 3.96 | 3.87 | 4.02 | 3.95 |

## 12.2 Visitor Expectations

*12.2.1 Visitor satisfaction – 2013*

For over two-fifths of respondents their visit to Orkney had exceeded their expectations, whilst over half felt their expectations had been met. Only a very small percentage of respondents felt their expectations had not been met.

**Chart 12.2: Extent to which expectations were met**
**Base: all online respondents (821)**




Holiday respondents were most likely to feel that their expectations had been exceeded. VFR and business respondents were more likely to be repeat visitors therefore it should not be surprising that higher proportion of these respondents felt their expectations had been met. In addition, feedback from business respondents suggests they have fewer expectations of their visit as they are working rather than on holiday.

**Table 12.5: Extent to which expectations were met – total and by visitor type**
**Base: all online respondents (821)**

| | **Total %** | **Holiday %** | **VFR %** | **Business %** |
|---|---|---|---|---|
| Exceeded expectations | 44 | 50 | 38 | 22 |
| Met expectations | 53 | 47 | 63 | 69 |
| Did not meet expectations | 1 | 1 | - | 2 |
| Not sure/can't say | 2 | 2 | - | 8 |

*12.2.2 Visitor satisfaction – comparison with previous surveys*

The visit to Orkney exceeded the expectations of 44% of visitors in 2013, a significant increase on previous surveys when a third of respondents said it had exceeded expectations. Holiday respondents were much more likely than in previous years to think that their expectations had been exceeded (50% in 2013 compared to 31% in 2009).

**Table 12.6: Extent to which expectations were met – comparison with previous surveys Base: all respondents**

| | **2013** | **2009** | **2005** |
|---|---|---|---|
| Number of respondents | 1171 | 1149 | 1273 |
| | % | % | % |
| Exceeded expectations | 44 | 32 | 33 |
| Met expectations | 53 | 63 | 60 |
| Did not meet expectations | 1 | 0 | 0 |
| Not sure/can't say | 2 | 5 | 5 |

Comments from visitors on areas for improvement highlighted the different priorities of the visitor types. The main issues identified from the comments were:

- Holiday
    - reduce costs – inter-island and other ferries
    - improve tourist information - better signposting/information points/maps of visitor attractions/itineraries/guides
    - improve availability and quality of cafes/'eateries'

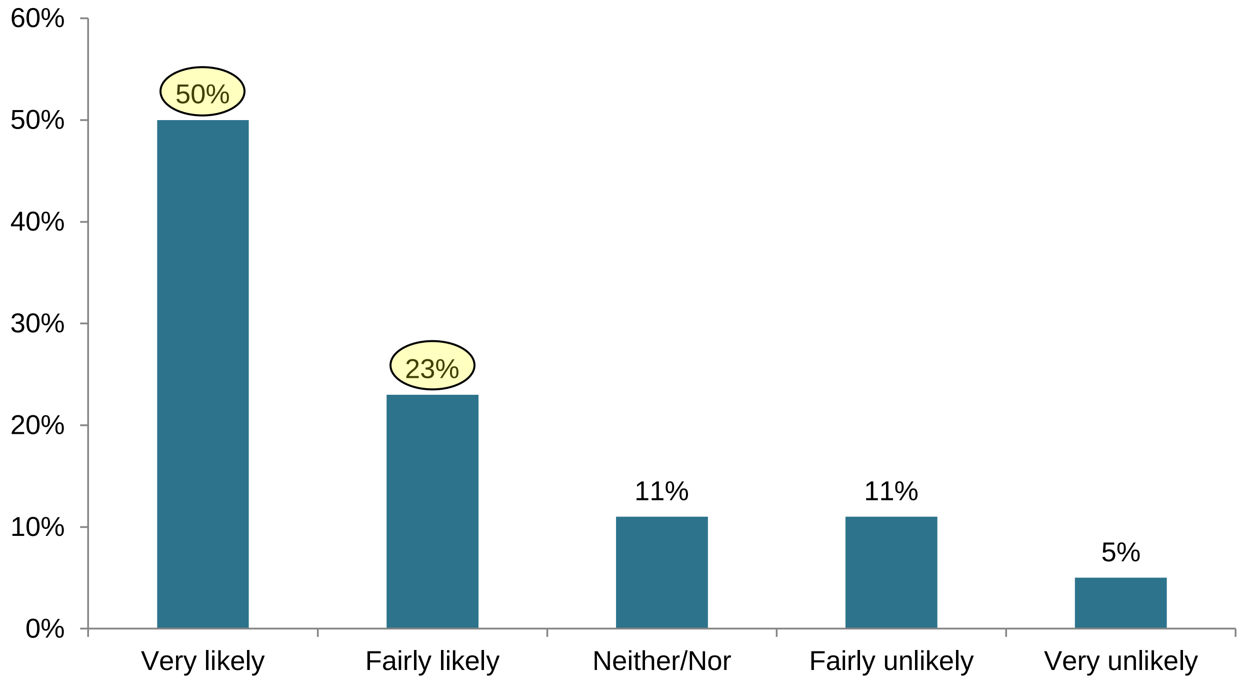
- VFR
    - reduce costs of flights, ferries, petrol

- Business
    - better phone and internet connections
    - reduce transport costs (especially flight)

### 12.3 Likelihood of Returning

Respondents were asked how likely they would be to visit Orkney in the next five years for a leisure holiday or short break. Almost three-quarters (73%) indicated that they were likely to do so, with exactly half very likely to do so.

**Chart 12.3: Likelihood of re-visiting within five years**
**Base: all online respondents (821)**




VFR respondents were highly likely to visit again within five years, perhaps unsurprisingly, given that they have existing links to friends and relatives. Interestingly, more business respondents (52%) stated they would be very likely to revisit for a leisure holiday or short break than holiday respondents (42%), though in general respondents' intentions to revisit were encouragingly high.

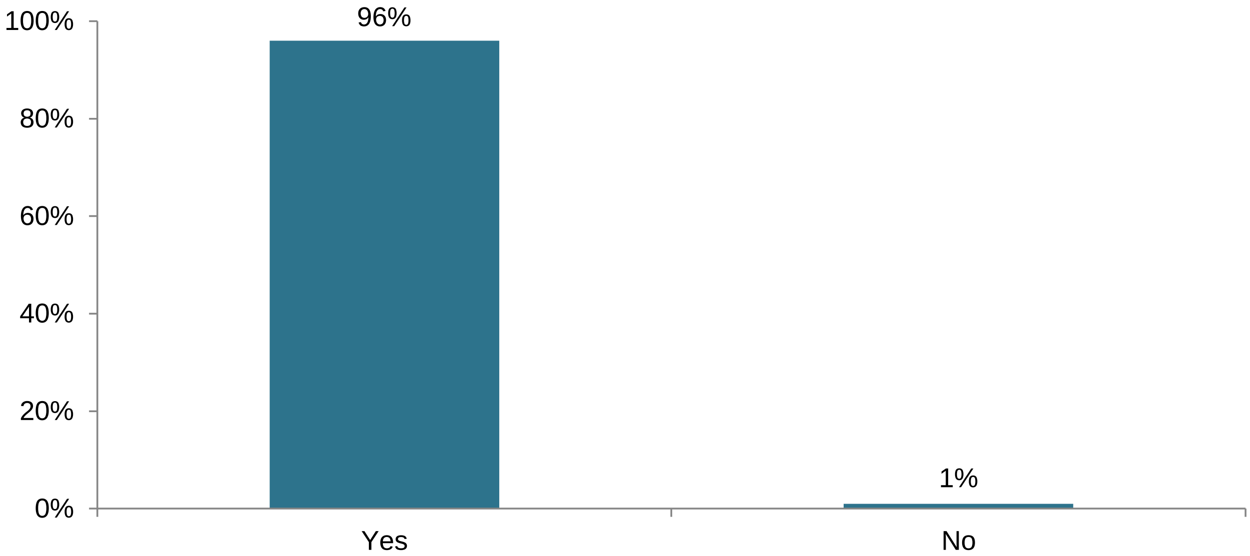
**Table 12.7: Likelihood of re-visiting within five years – total and by visitor type**
**Base: all online respondents (821)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Very likely | 50 | 42 | 76 | 52 |
| Fairly likely | 23 | 24 | 13 | 28 |
| Neither/Nor | 11 | 14 | 1 | 12 |
| Fairly unlikely | 11 | 13 | 6 | 7 |
| Very unlikely | 5 | 7 | 4 | 1 |

## 12.4 Likelihood of Recommending

The vast majority of respondents stated that they would be likely to recommend Orkney to others as a holiday destination.

**Chart 12.4: Likelihood of recommending Orkney**
**Base: all online respondents (821)**




All respondent types were very likely to recommend Orkney, though holiday respondents in particular seemed most likely to champion Orkney to others as a holiday destination.

**Table 12.8: Likelihood of recommending Orkney – total and by visitor type**
**Base: all online respondents (821)**

| | Total % | Holiday % | VFR % | Business % |
|---|---|---|---|---|
| Yes | 96 | 98 | 92 | 91 |
| No | 1 | * | 4 | 2 |
| Don't know | 2 | 1 | 1 | 5 |

**12.5 Satisfaction with Visit – Island Comparisons**

When compared by island and type of visit, overall satisfaction levels were very similar. On specific elements of the visit:

- On Orkney, in general, holiday and VFR respondents were likely to be most satisfied with their visit (as indicated by the blue highlighted mean scores), though business respondents were the group most satisfied with local food and drink products.
- In the Outer Hebrides, holiday respondents were most satisfied with visitor attractions, local information about places to visit and dining out, whilst VFR respondents had the highest levels of satisfaction with local elements, such as food & drink, arts & crafts, local produce and events & festivals. Business respondents had the highest levels of satisfaction with the value for money of local arts and crafts.
- On Shetland, holiday respondents were most satisfied with visitor attractions and local information about places to visit, whilst VFR respondents had the highest levels of satisfaction with local elements, such as arts & crafts, food & drink, and events & festivals. Business respondents had the highest levels of satisfaction with dining out, both value for money and availability of local produce.

**Table 12.9: Overall satisfaction / Satisfaction with specific elements of visit**
**Base: all online respondents**

| | Orkney | | | Outer Hebrides | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|
| | **Holiday** | **VFR** | **Business** | **Holiday** | **VFR** | **Business** | **Holiday** | **VFR** | **Business** |
| | Mean score (out of 5) | | | Mean score (out of 5) | | | Mean score (out of 5) | | |
| **Overall satisfaction with visit** | **4.90** | **4.93** | **4.72** | **4.91** | **4.89** | **4.69** | **4.90** | **4.89** | **4.59** |
| Quality of visitor attractions | 4.71 | 4.58 | 4.38 | 4.33 | 4.10 | 3.96 | 4.55 | 4.35 | 4.14 |
| Quality of local food/drink products | 4.32 | 4.43 | 4.46 | 4.13 | 4.22 | 4.08 | 4.03 | 4.11 | 4.08 |
| Availability of information locally about places to visit during trip | 4.37 | 4.31 | 4.29 | 4.14 | 4.14 | 4.00 | 4.20 | 4.12 | 4.11 |
| Value for money of visitor attractions | 4.35 | 4.26 | 4.20 | 4.26 | 4.15 | 3.84 | 4.44 | 4.27 | 4.03 |
| Quality of local arts/crafts products | 4.28 | 4.40 | 4.18 | 4.07 | 4.25 | 3.92 | 4.09 | 4.38 | 4.05 |
| Signposting | 4.16 | 4.16 | 4.04 | 4.05 | 4.09 | 3.86 | 4.10 | 4.11 | 4.14 |
| Availability of local produce when dining out | 4.10 | 4.21 | 4.12 | 4.03 | 4.11 | 3.97 | 3.70 | 3.98 | 4.08 |
| Value for money dining out | 4.10 | 4.08 | 4.07 | 4.04 | 3.93 | 3.90 | 3.88 | 3.90 | 4.01 |
| Value for money of local arts and crafts products | 3.97 | 4.05 | 3.82 | 3.79 | 3.88 | 3.90 | 3.81 | 3.94 | 3.83 |
| Opportunities to attend local events/ festivals | 3.87 | 4.02 | 3.95 | 3.61 | 4.14 | 3.72 | 3.89 | 4.11 | 3.88 |

Respondents overall views on their visit showed some island variations:

- Holiday respondents were most likely to state that their expectations had been exceeded, and holiday respondents on Shetland were most likely to state this (56%), compared to Orkney (50%) and the Outer Hebrides (47%)
- A high proportion of VFR respondents indicated an intention to return, especially on the Outer Hebrides (87%), compared to Shetland (77%) and Orkney (76%). Also on the Outer Hebrides, 55% of holiday respondents stated they were very likely to return compared to 42% on Orkney and Shetland
- The vast majority of all respondents would recommend their destination to others with the exception of business respondents on Shetland, two-thirds of whom would recommend.

**Table 12.10: Overall views on visit**
**Base: all online respondents**

| | Orkney | | | | Outer Hebrides | | | | Shetland | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Holiday** | **VFR** | **Business** | | **Holiday** | **VFR** | **Business** | | **Holiday** | **VFR** | **Business** |
| **Visitor expectations** | | | | | | | | | | | |
| Exceeded expectations | 50 | 38 | 22 | | 47 | 29 | 17 | | 56 | 42 | 16 |
| Met expectations | 47 | 63 | 69 | | 51 | 66 | 70 | | 40 | 53 | 67 |
| Did not meet expectations | 1 | - | 2 | | 1 | 1 | 2 | | 2 | 2 | 6 |
| Not sure/can't say | 2 | - | 8 | | 2 | 3 | 12 | | 2 | 3 | 11 |
| | | | | | | | | | | | |
| **Likelihood of Returning** | | | | | | | | | | | |
| Very likely | 42 | 76 | 52 | | 55 | 87 | 51 | | 42 | 77 | 41 |
| Fairly likely | 24 | 13 | 28 | | 24 | 7 | 28 | | 23 | 18 | 20 |
| Neither/Nor | 14 | 1 | 12 | | 11 | 3 | 12 | | 16 | 3 | 14 |
| Fairly unlikely | 13 | 6 | 7 | | 6 | - | 5 | | 12 | 2 | 13 |
| Very unlikely | 7 | 4 | 1 | | 4 | 3 | 4 | | 7 | - | 12 |
| | | | | | | | | | | | |
| **Likelihood of Recommending** | | | | | | | | | | | |
| Yes | 98 | 92 | 91 | | 95 | 92 | 90 | | 94 | 89 | 68 |
| No | * | 4 | 2 | | 1 | 2 | 4 | | 1 | 2 | 13 |
| Don't know | 1 | 1 | 5 | | 3 | 4 | 6 | | 4 | 6 | 16 |

# APPENDIX 1: FACE-TO-FACE EXIT SURVEY QUESTIONNAIRE

**ORKNEY SURVEY - FACE TO FACE INTERVIEWS - QUESTIONNAIRE**

**SECTION ONE: INTERVIEW DETAILS - TO BE COMPLETED AT END OF INTERVIEW**

**This interview has been conducted in accordance with instructions and the MRS Code of Conduct.**

**Interviewer name ....................................................Signature ................................................................**

**Date of interview** ______________________________________ **Month** ___________________________________

**SECTION TWO: INTERVIEWER TO COMPLETE**

**A** **Day of week of interview**

Monday................................1 Friday ................................5
Tuesday...............................2 Saturday............................6
Wednesday ..........................3 Sunday ..............................7
Thursday..............................4

**B** **Interview location**

Kirkwall airport......................1 St Margaret's Hope ferry ....4
Kirkwall ferry ........................2 Burwick ferry .....................5
Stromness ferry....................3

Good morning/afternoon/evening, my name is ....... from the independent research agency, Scotinform Ltd. We are carrying out interviews with visitors as they leave Orkney on behalf of Orkney Islands Council, the Scottish national tourism organisation, VisitScotland, and Highlands and Island Enterprise. I'm interested in finding out about your visit to Orkney and if there is anything that could be done to improve the experience of visiting the island.

**SECTION THREE: ABOUT THE RESPONDENT**

**3.1.** **First of all, can I check that you are a visitor to Orkney, either on a holiday/leisure trip or a business trip? READ OUT LIST - ONE ANSWER ONLY**

Yes- visitor for holiday/leisure/business ......... 1
No - in transit, not visiting Orkney .................. 2 CLOSE INTERVIEW
No - live on island .......................................... 3 CLOSE INTERVIEW

**ENSURE RESPONDENT IS DEPARTING TO RELEVANT DESTINATION (SEE Q5.1)**

**3.2.** **Did you spend the majority of your visit on a yacht?**

Yes ................................................................. 1 CLOSE INTERVIEW
No................................................................... 2

**3.3.** **On this current trip, have you also visited or will you visit either of these islands?**

Outer Hebrides ............................................... 1 ASK Q3.3a
Shetland ......................................................... 2 ASK Q3.3a
No, not visited either…… 3 GO TO Q3.4

**3.3a** **Did you take part in an interview when leaving (Outer Hebrides/Shetland)?**

Yes……………………………………………… 1 CLOSE INTERVIEW
No……………………............................... 2

**SHOWCARD A**

**3.4.** **Which of the following best describes your current visit to Orkney?**
**ONE ANSWER ONLY**

Holiday - day trip 1 GO TO Q3.7
Visiting friends or relatives for leisure/holiday – day trip .......................................... 2 GO TO Q3.7
Holiday/short break involving staying overnight on island (1 or more nights)........... 3 ASK Q3.5
Visiting friends or relatives for leisure/holiday – overnight trip (1 or more nights) .... 4 ASK Q3.5
On business – day trip.............................................................................................. 5 GO TO Q3.6
On business – overnight trip………………………………………………………….. 6 GO TO Q3.6
Combining business and holiday ............................................................................. 7 GO TO Q3.6
Other......................................................................................................................... 8 GO TO Q3.8

**3.5.** **Was this your ...? ONE ANSWER ONLY**

Main holiday of this year................................ 1 GO TO Q3.8
A second trip or short break .......................... 2 GO TO Q3.8

**3.6. What industry do you work in? ONE ANSWER ONLY**

| | | | |
|---|---|---|---|
| Government/local government………….. | 1 | Transport - shipping, etc ………………….. | 8 |
| Renewable energy………………………… | 2 | Fishing……………………………………… | 9 |
| Oil/gas……………………………………… | 3 | Health services…………………………… | 10 |
| Retail sales/service……………………..... | 4 | Financial services………………………… | 11 |
| Media……………………………………..... | 5 | IT…………………………………………… | 12 |
| Tourism……………………………………..... | 6 | Industrial manufacturing………………..... | 13 |
| Food/drink manufacture…………….. | 7 | Other WRITE IN…………………………… | 14 |

______________________________________

**ALL BUSINESS VISITORS GO TO Q4.1**

**3.7. Was this day trip to the island...? READ OUT ONE ANSWER ONLY**

On a guided tour package ............................... 1
An independent day trip .................................. 2

**3.8. What was the main reason for choosing to visit Orkney? DO NOT PROMPT**

| |
|---|
| |

**ASK ALL**

**SECTION FOUR: LENGTH OF VISIT**

**4.1. Approximately how many times have you visited Orkney before? ONE ANSWER ONLY**

This is my first visit .......................................... 1
Once before..................................................... 2
Twice .............................................................. 3
3-5 times......................................................... 4
6-10 times....................................................... 5
More than 10 times.......................................... 6
Lived in Orkney ............................................... 7

**4.2. On this trip, how many nights will you spend away from home in the following locations?**
**WRITE IN NUMBER OF NIGHTS, PUT '0' IF NO NIGHTS AWAY FROM HOME**

In Orkney……………………………………… ____________________
Elsewhere in Scotland………………………...____________________
In total during your trip away from home…… ________________________________________

**SHOW CARD B**

**4.3. Which of the following areas of Orkney did you visit during your trip?**
**MORE THAN ONE ANSWER POSSIBLE – CIRCLE CODE BELOW**

**IF ON DAY TRIP (CODE 1, 2 OR 5 AT Q3.4) GO TO SECTION 5**

**4.4 How many nights did you spend in each area? ASK NUMBER OF NIGHTS FOR EACH AREA VISITED.**
**IF NO NIGHTS IN AREA WRITE IN 'O'**

| | **4.3 Visit** | **4.4 Number of nights** | |
|---|---|---|---|
| Kirkwall .......................................................... | 1 | ________________ | |
| Stromness ..................................................... | 2 | ________________ | |
| West Mainland (excluding Stromness)........... | 3 | ________________ | |
| East Mainland (excluding Kirkwall) ................ | 4 | ________________ | |
| North Ronaldsay............................................ | 5 | ________________ | |
| Papa Westray................................................ | 6 | ________________ | |
| Westray ......................................................... | 7 | ________________ | |
| Sanday .......................................................... | 8 | ________________ | |
| Eday .............................................................. | 9 | ________________ | |
| Egilsay........................................................... | 10 | ________________ | |
| Rousay .......................................................... | 11 | ________________ | |
| Wyre .............................................................. | 12 | ________________ | |
| Stronsay ........................................................ | 13 | ________________ | |
| Shapinsay...................................................... | 14 | ________________ | |
| Graemsay...................................................... | 15 | ________________ | |
| Hoy ................................................................ | 16 | ________________ | |
| Flotta.............................................................. | 17 | ________________ | |
| Burray/South Ronaldsay ............................... | 18 | ________________ | |
| Total nights in Orkney | | ________________ | **CHECK WITH TOTAL AT Q4.2** |

## SECTION FIVE: TRANSPORT

**5.1.** **Which airport or ferry terminal did you arrive in Orkney from? ONE ANSWER ONLY**

**5.2.** **INTERVIEWER TO COMPLETE DESTINATION. ONE ANSWER ONLY - ASK RESPONDENT IF NECESSARY**

| | **5.1 Arrived from** | **5.2 Departing to** |
|---|---|---|
| Aberdeen - ferry | 1 | 1 |
| Lerwick - ferry | 2 | 2 |
| Scrabster - ferry | 3 | 3 |
| Gills Bay - ferry | 4 | 4 |
| John O'Groats - ferry | 5 | 5 |
| Aberdeen - flight | 6 | 6 |
| Bergen - flight | 7 | 7 |
| Edinburgh - flight | 8 | 8 |
| Glasgow - flight | 9 | 9 |
| Inverness - flight | 10 | 10 |
| Sumburgh, Shetland - flight | 11 | 11 |

| **Q5.3 TO BE CODED IN OFFICE** | |
|---|---|
| Arrived and departed by ferry | 1 |
| Arrived and departed by flight | 2 |
| Used ferry and flight | 3 |

**5.4.** **Did you have any issues when you booked your travel to Orkney?**

Yes……………………………………........................ 1 ASK Q5.5
No………………………………………………………… 2 GO TO Q5.6

SHOW CARD C

**5.5.** **Did you have any of the following issues when you booked your travel to Orkney? MORE THAN ONE ANSWER POSSIBLE**

My first choice of transport type was unavailable .................. 1
No **ferries** at times/days I wanted .......................................... 2
No flights at times/days I wanted ........................................... 3
The **ferries** I wanted were too expensive .............................. 4
The flights I wanted were too expensive ................................ 5
The **ferries** I wanted were fully booked ................................. 6
The flights I wanted were fully booked ................................... 7
No **ferries** on preferred route ................................................ 8
No flights on preferred route.................................................. 9
Other WRITE IN………………………………………… 10

SHOW CARD D

**5.6.** **How satisfied were you with the facilities or services at (interview location)?**

Very satisfied......................................................................... 1 GO TO Q5.8
Fairly satisfied…………………………………………... 2 GO TO Q5.8
Neither satisfied nor dissatisfied……………………… 3 GO TO Q5.8
Fairly dissatisfied.................................................................... 4 ASK Q5.7
Very dissatisfied ..................................................................... 5 ASK Q5.7

**5.7.** **Why were you dissatisfied with the facilities or services at (interview location)? PROBE FULLY**

**5.8.** **Which of these are you travelling to next? ONE ANSWER ONLY**

Home...................................................................................... 1
Another part of Scotland......................................................... 2
Another part of the UK (England/Wales/Northern Ireland)...... 3
Other WRITE IN ..................................................................... 4

**SHOW CARD E**

**5.9. What was the main type of transport you used during your visit to Orkney? ONE ANSWER ONLY**

**5.10. And what other types of transport did you use during your visit to Orkney? EXCLUDES TRANSPORT MENTIONED AT Q5.9. MORE THAN ONE ANSWER POSSIBLE**

| | **5.9 Main transport - ONE ANSWER** | **5.10 Other forms of transport** |
|---|---|---|
| Car - own/friends/firms | 1 | 1 |
| Car - hired | 2 | 2 |
| Motorhome | 3 | 3 |
| Organised coach tour | 4 | 4 |
| Regular bus/coach | 5 | 5 |
| Taxi | 6 | 6 |
| Motorbike | 7 | 7 |
| Bicycle | 8 | 8 |
| Plane | 9 | 9 |
| Ferry/public boat | 10 | 10 |
| Private boat (own/hired) | 11 | 11 |
| Hitch-hiked | 12 | 12 |
| Walked | 13 | 13 |
| None | n/a | 14 |
| Other WRITE IN | 15 | 15 |

## SECTION SIX: ACCOMMODATION

**ASK SECTION SIX IF RESPONDENT STAYING OVERNIGHT - NOT ON DAY TRIP i.e. NOT Q3.4=1, 2 OR 5. DAY TRIPPERS GO TO SECTION SEVEN.**

**6.1 What type of accommodation did you stay in during this visit to Orkney? PROMPT IF NECESSARY - MORE THAN ONE ANSWER POSSIBLE**

| | | |
|---|---|---|
| Hotel (5 star/luxury) | 1 | ASK Q6.2 |
| Hotel (4 star) | 2 | |
| Hotel (3 star) | 3 | |
| Hotel (1-2 star) | 4 | |
| Inn | 5 | |
| Restaurant with rooms | 6 | |
| Guest house/bed and breakfast | 7 | |
| Self-catering - rented house/cottage/chalet | 8 | |
| Hostel | 9 | |
| Camping Bod (not applicable to Orkney) | 10 | |
| Static caravan | 11 | |
| Touring caravan pitch at serviced campsite | 12 | GO TO Q6.4 |
| Tent at serviced campsite | 13 | |
| Tent (non-campsite) | 14 | |
| Motorhome at serviced campsite | 15 | |
| Motorhome (non-campsite) | 16 | |
| Staying with friends/family | 17 | |
| Second home | 18 | |
| Workers' accommodation on-site/rig | 19 | |
| Other WRITE IN | 20 | |

**6.2 Was the type of accommodation you wanted available?**

Yes, type was available 1
No, type was not available 2
Don't know 3

**6.3 Was the quality of accommodation you wanted available?**

Yes, quality was available 1
No, quality was not available 2
Don't know 3

**6.4** **How did you book your accommodation? MORE THAN ONE ANSWER POSSIBLE IF MORE THAN ONE TYPE OF ACCOMMODATION STAYED IN. PROMPT IF NECESSARY**

Someone booked my accommodation on my behalf…………1
Did not need to book - stayed with friends/family, own property or motorhome etc…………2
Accommodation providers' website…………3
Accommodation provider by email…………4
Accommodation provider by telephone…………5
Through visitscotland.com…………6
Tour operator or travel company website…………7
High Street Travel Agent (e.g. Thomas Cook)…………8
Visitor Information Centre\tourist board office…………9
Through an Internet Travel Agent (e.g. Expedia, LastMinute.com, Opodo.co.uk, Travelocity, etc.) 10
Other WRITE IN…………11
I didn't book any accommodation in advance of arriving…………12
Don't know…………13

## SECTION SEVEN: SATISFACTION WITH VISIT

**SHOW CARD F**

**7.1.** **Overall how satisfied were you with your visit to Orkney**

Very satisfied………… 1
Fairly satisfied………… 2
Neither satisfied nor dissatisfied………… 3
Fairly dissatisfied………… 4
Very dissatisfied………… 5

**7.2.** **Was there any aspect of your visit that you were not satisfied with? PROBE – ASK 'ANYTHING ELSE' TWICE**

**7.3.** **What was the highlight of your visit to Orkney or the single thing that you enjoyed or appreciated most? PROBE FULLY**

## SECTION EIGHT: EXPENDITURE

**EXPLAIN TO RESPONDENT THAT THE SURVEY IS MEASURING HOW MUCH PEOPLE SPEND ON THEIR VISIT TO THE ISLAND. IN ORDER TO DO THIS YOU ARE GOING TO ASK QUESTIONS ON HOW MUCH THEY AND THEIR GROUP HAVE SPENT ON DIFFERENT ITEMS. IF THEY CANNOT PROVIDE EXACT AMOUNTS THEN AN ESTIMATE OF EXPENDITURE WOULD BE USEFUL.**

**8.1.** **How many people, including yourself, are in your immediate group or party?**

**WRITE IN NUMBER, INCLUDING RESPONDENT**

**SHOW CARD G**

**8.2.** **Including yourself, how many people in your group are <u>female</u> in the following age groups?**

**8.3.** **Including yourself, how many people in your group are <u>male</u> in the following age groups?**

| | 8.2 Females | 8.3 Males |
|---|---|---|
| Under 16 | | |
| 16-24 | | |
| 25-34 | | |
| 35-44 | | |
| 45-54 | | |
| 55-64 | | |
| over 65 | | |
| Total number | | |

**CHECK THAT TOTAL FEMALES AND TOTAL MALES EQUAL TOTAL AT Q8.1**

**8.4. Which of these best describes who is with you on your trip?**
**READ OUT LIST. MORE THAN ONE ANSWER POSSIBLE.**

Travelling alone……………………………… 1
Partner/spouse……………………………… 2
With child/children………………………... 3
With parents or partner's parents………… 4
Other members of family…………………… 5
Friends……………………………………….. 6
Organised group/tour……………………….. 7
Business/work colleagues………………….. 8
Someone else WRITE IN…………………... 9
WRITE IN WHO ELSE ON TRIP
_______________________________________________________________

**8.5. Were you on a package or inclusive holiday? (i.e. a holiday where your transport and accommodation were booked through a tour operator. This includes day trip packages)**

Yes ........................................................... 1 SEE INSTRUCTION BELOW
No ............................................................. 2

**IF ON PACKAGE HOLIDAY WRITE TOTAL AMOUNT OF PACKAGE IN FIRST BOX AT Q8.6 AND COMPLETE OTHER CATEGORIES ONLY IF EXPENDITURE IS NOT INCLUDED IN THE PACKAGE**

**SHOW CARD H**

**8.6. How much did you and your immediate party/group spend on the following items in total during your trip? PUT EXACT AMOUNT STATED IN £. IF THEY CANNOT STATE EXACT AMOUNT, AN ESTIMATE WILL DO.**

| | **£ spend** |
|---|---|
| Price of package/inclusive holiday | |
| **Travel to and from** the mainland/departure point | |
| **Travel costs on the island** (fuel, hire charges, public transport, etc.) | |
| **Accommodation** including any food and drink at premises | |
| **Food and drink** bought elsewhere (prepared by yourself or in cafe/restaurant) | |
| **Entertainment and Recreation** including admission fees to attractions, tours, trips and other activities | |
| **Shopping** for gifts souvenirs, crafts, etc. | |
| **Shopping not included above** | |
| **Miscellaneous spend** not included above | |
| **Total cost of trip** - TO BE COMPLETED IN OFFICE | |

**SHOW CARD I**

**8.7. Within the expenditure figures given above, how much have you and your immediate party/group spent on the following local products or produce during this trip? PUT IN NUMBER IN £**

**Local crafts** such as jewellery, pottery, furniture, textiles, paintings……………………..______________
**Local food** such as fish, meat, cheese, sweets, fudge, ice cream, oatcakes…………..______________
**Local beverages/drinks** such as whisky, wine, beer, non-alcoholic drinks……………. ______________
**Total amount spent on local products/produce** - TO BE COMPLETED IN OFFICE. ______________

## SECTION NINE: DEMOGRAPHICS - RESPONDENT

**EXPLAIN THAT THE FINAL QUESTIONS ASK FOR DETAILS OF THE RESPONDENT IN ORDER TO CLASSIFY THE RESULTS. THIS INFORMATION IS ENTIRELY CONFIDENTIAL AND WILL ONLY BE USED FOR THE PURPOSES OF ANALYSING THE RESULTS OF THE SURVEY.**

**9.1. Gender of respondent. DO NOT ASK**

Male........................................................... 1
Female ....................................................... 2

**9.2. Where do you normally live? ONE ANSWER ONLY**

| | | |
|---|---|---|
| Scotland | 1 | ASK Q9.3 |
| England | 2 | ASK Q9.4 |
| Wales | 3 | GO TO Q9.5 |
| Northern Ireland | 4 | |
| Other UK e.g. Isle of Man | 5 | |
| Republic of Ireland | 6 | |
| Norway | 7 | |
| France | 8 | |
| Germany | 9 | |
| Italy | 10 | |
| Spain | 11 | |
| Netherlands | 12 | |
| Other Europe WRITE IN | 13 | |
| USA | 14 | |
| Canada | 15 | |
| Australia | 16 | |
| New Zealand | 17 | |
| Other country WRITE IN | 18 | |

**9.3. Which local authority area of Scotland do you live in? ONE ANSWER ONLY**

| | | | |
|---|---|---|---|
| Aberdeen City | 1 | Highland | 17 |
| Aberdeenshire | 2 | Inverclyde | 18 |
| Angus | 3 | Midlothian | 19 |
| Argyll & Bute | 4 | Moray | 20 |
| Clackmannanshire | 5 | North Ayrshire | 21 |
| Dumfries & Galloway | 6 | North Lanarkshire | 22 |
| Dundee City | 7 | Orkney Islands – not applicable | 23 |
| East Ayrshire | 8 | Perth & Kinross | 24 |
| East Dunbartonshire | 9 | Renfrewshire | 25 |
| East Lothian | 10 | Scottish Borders | 26 |
| East Renfrewshire | 11 | Shetland Islands | 27 |
| Edinburgh, City of | 12 | South Ayrshire | 28 |
| Eilean Siar | 13 | South Lanarkshire | 29 |
| Falkirk | 14 | Stirling | 30 |
| Fife | 15 | West Dunbartonshire | 31 |
| Glasgow City | 16 | West Lothian | 32 |

**SHOW CARD J**

**9.4. Which area of England do you live in? ONE ANSWER ONLY**

| | |
|---|---|
| Greater London | 1 |
| South East | 2 |
| South West | 3 |
| East Midlands | 4 |
| West Midlands | 5 |
| East Anglia/East of England | 6 |
| Yorkshire/Humberside | 7 |
| North East | 8 |
| North West | 9 |

**SHOW CARD K**

**9.5. Which of the following age groups are you in? ONE ANSWER ONLY**

| | |
|---|---|
| 16-24 | 1 |
| 25-34 | 2 |
| 35-44 | 3 |
| 45-54 | 4 |
| 55-64 | 5 |
| Over 65 | 6 |

**SHOW CARD L**

**9.6. Which of these best describes the occupation of the main income earner in your household? ONE ANSWER ONLY**

| | | | |
|---|---|---|---|
| | High managerial, administrative or professional - e.g. doctor, lawyer, company director (50+ people), judge, surgeon, school headteacher, etc | 1 | GO TO SECTION TEN |
| | Intermediate managerial, administrative or professional - e.g. school teacher, office manager, junior doctor, bank manager, police inspector, accountant etc. | 2 | |
| | Supervisor; clerical; junior managerial, administrative or professional - e.g. policeman, nurse, secretary, clerk, self-employed (5+ people) etc. | 3 | |
| | Skilled manual worker - e.g. mechanic, plumber, electrician, lorry driver, train driver etc. | 4 | |
| | Semi-skilled or unskilled manual worker - e.g. baggage handler, waiter, factory worker, receptionist, labourer, gardener etc. | 5 | |
| | Housewife / homemaker | 6 | |
| | Unemployed | 7 | |
| | Student | 8 | |
| | Retired | 9 | ASK Q9.7 |

**9.7. You say that the main income earner in the household is now retired. Which of the following best describes their occupation before they retired? ONE ANSWER ONLY**

| | | |
|---|---|---|
| | High managerial, administrative or professional - e.g. doctor, lawyer, company director (50+ people), judge, surgeon, school headteacher, etc | 1 |
| | Intermediate managerial, administrative or professional - e.g. school teacher, office manager, junior doctor, bank manager, police inspector, accountant etc. | 2 |
| | Supervisor; clerical; junior managerial, administrative or professional - e.g. policeman, nurse, secretary, clerk, self-employed (5+ people) etc. | 3 |
| | Skilled manual worker - e.g. mechanic, plumber, electrician, lorry driver, train driver etc. | 4 |
| | Semi-skilled or unskilled manual worker - e.g. baggage handler, waiter, factory worker, receptionist, labourer, gardener etc. | 5 |
| | Housewife / homemaker | 6 |
| | Unemployed | 7 |
| | Student | 8 |

SOCIO ECONOMIC CLASSIFICATION - TO BE CODED IN OFFICE

| | |
|---|---|
| A (1) | 1 |
| B (2) | 2 |
| C1 (3 AND 8) | 3 |
| C2 (4) | 4 |
| D (5) | 5 |
| E (6 AND 7) | 6 |

## SECTION TEN: DETAILS OF GROUP/PARTY

**Would you be interested in receiving an online survey asking about your experiences on Orkney with the chance to win an iPad? The online survey will ask you for more detailed views about your visit and your feedback will help improve the visitor experience in Orkney.**
**STRESS CONFIDENTIALITY OF DETAILS AND COMPLIANCE WITH DATA PROTECTION ACT**

**If you provide your email address I will arrange for you to be sent the online link to the questionnaire in the next few weeks- this will give you the chance to enter a prize draw for an iPad.**
Email ________________________________________________________________

**IF RESPONDENT DOES NOT WISH TO PROVIDE EMAIL EXPLAIN THAT WE CAN POST A QUESTIONNAIRE TO THEM IF THEY WISH TO TAKE PART IN THE SURVEY. ASK FOR FULL POSTAL ADDRESS, INCLUDING POSTCODE**

________________________________________________________________

**COLLECT RESPONDENT PHONE NUMBER FOR BACK CHECKING AND CLOSE INTERVIEW**

**Respondent name** ______________________________ **Telephone** ______________________

If phone not available ask for email or address ________________________________________________

**THANK RESPONDENT AND HAND OUT THANK YOU CARD**

# APPENDIX 2: ONLINE SURVEY QUESTIONNAIRE

**TELL US ABOUT YOUR VISIT**

**Please complete the questionnaire by clicking the appropriate buttons and typing your respones in the boxes provided. If you would like to enter the free prize draw for an iPad please provide your email address at the end of the questionnaire.**

**The questionnaire should take approximately ten minutes to complete. Once you are finished just press 'submit'. Thanks again.**

**Section 1: Details of Your Visit**
**This section asks you to confirm details of your recent visit.**

**Please tick one box to show which island you were visiting when you took part in the survey.**

- Orkney
- The Outer Hebrides
- Shetland

**NOTE: The Outer Hebrides includes Lewis, Harris, Berneray, North Uist, Benbecula, South Uist, Eriskay and Barra & Vatersay**

**What month was your visit to {Q1.1}? If it covered more than one month, please tick the month you spent most days in {Q1.1}.**

| | |
|---|---|
| January | July |
| February | August |
| March | September |
| April | October |
| May | November |
| June | December |

**Which of the following best describes your recent visit to {Q1.1}**

- Holiday - day trip
- Visiting friends or relatives for leisure/holiday - day trip
- Holiday/short break involving staying overnight on island
- Visiting friends or relatives for leisure/holiday - overnight trip
- On business - day trip
- On business staying overnight on island
- Combining business and holiday
- Other

Other, please specify

**Section 2: Planning Your Visit**

**Did you consider visiting either of the following islands rather than going to {Q1.1}?**

- The Outer Hebrides
- Shetland
- No did not consider visiting these other islands

**Section 2: Planning Your Visit**

**Did you consider visiting either of the following islands rather than going to {Q1.1} on your most recent trip?**

- Orkney
- Shetland
- No did not consider visiting these other islands

**Section 2: Planning Your Visit**

**Did you consider visiting either of the following islands rather than going to {Q1.1} on your most recent trip?**

- Orkney
- The Outer Hebrides
- No did not consider visiting these other islands

**Why did you choose {Q1.1} rather than the other island/s?**

**Which of the following, if any, influenced your decision to visit {Q1.1}**

- Experience of previous visit/know area
- Recommendation from friend/relative
- Newspaper or magazine article
- Newspaper or magazine advertisement
- Radio or TV programme about {Q1.1}
- Radio/TV advertisement about {Q1.1}
- Tourist Brochure
- Internet/website
- Social media (Facebook/Twitter)
- Guide books
- Family connections with the area
- A film/movie or book featuring the area
- Interest in the archaeology/history
- Interest in scenery/landscape
- Specific activities such as walking or golf
- Particular events/festivals
- Interest in particular attractions
- To undertake particular activities
- To stay in particular accommodation
- Other reason
- None of these
- Don't know/can't remember

Please specify the event/festival you were most interested in

Please specify the attraction you were most interested in

Please specify the activity you were most interested in

Please specify the accommodation you most wanted to stay in

Please specify the other reason that influenced your decision to visit

**Which of the following, if any, influenced your decision to visit {Q1.1}?**

- Experience of previous visit/know area
- Recommendation from friend/relative
- Newspaper or magazine article
- Newspaper or magazine advertisement
- Radio or TV programme about {Q1.1}
- Radio/TV advertisement about {Q1.1}
- Tourist Brochure
- Internet/website
- Social media (Facebook/Twitter)
- Guide books
- Family connections with the area
- A film/movie or book featuring the area
- Interest in the archaeology/history
- Interest in scenery/landscape
- Specific activities such as walking or golf
- A particular event/festival
- Interest in particular attraction
- To undertake a particular activity
- To stay in particular accommodation
- Interest in geology (Geopark Shetland)
- Shetland webcams
- Promote Shetland direct mail/email
- Other reason
- None of these
- Don't know/can't remember

Please specify the attraction you were interested in

Please specify the activity you were interested in

Please specify the accommodation you wanted to stay in

Please specify the other reason that influenced your decision to visit

**Was your first visit to {Q1.1} a**

- visit by cruise ship
- day visit by coach tour
- None of the above

**How far in advance did you start <u>planning</u> your recent trip? i.e how much time was there between you starting to plan and actually visiting?**

- Less than 2 weeks
- 2 weeks up to 4 weeks
- 1 to 2 months
- 3 to 6 months
- Over 6 months to 1 year
- Over 1 to 2 years
- Over 2 years
- Not sure/don't know

**How far in advance did you book your recent trip? i.e how much time was there between booking the trip and going?**

- Didn't book in advance
- Less than 2 weeks
- 2 weeks up to 4 weeks
- 1 to 2 months
- 3 to 6 months
- Over 6 months
- Not sure/don't know

**Section 3: Island Attractions**

**Did you visit any visitor attractions during your business trip to {Q1.1}**

- Yes
- No
- Don't know

**Section 3: Orkney Island Attractions**

**The next few questions will ask you about a range of attractions on Orkney. We're interested in understanding your awareness of these attractioons and whether you visited them on you recent trip.**

**Which of these visitor attractions in Kirkwall have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| St Magnus Cathedral | | |
| Bishop's Palace and/or Earls Palace | | |
| Orkney Museum | | |
| Orkney Wireless Museum | | |
| Highland Park Distillery | | |
| Ortak Visit Centre | | |
| Pickaquoy Centre | | |

**Section 3: Orkney Island Attractions**

**Which of these visitor attractions in Stromness have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Pier Arts Centre | | |
| Stromness Museum | | |
| Ness Battery | | |

**Section 3: Orkney Island Attractions**

**Which of these visitor attractions in East Mainland, Burray/South Ronaldsay have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Lamb Holm - Italian Chapel | | |
| Burray - Fossil and Vintage Centre | | |
| South Ronaldsay - Tomb of the Eagles | | |
| South Ronaldsay - Marine Life Aquarium | | |
| South Ronaldsay - Smithy Museum | | |
| Sheila Fleet Visitor Centre | | |

**Section 3: Orkney Island Attractions**

**Which of these visitor attractions in West Mainland have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Skara Brae | | |
| Sandwick - Skaill House | | |
| Stenness - Standing Stones | | |
| Stenness - Maeshowe | | |
| Stenness - Ring of Brodgar | | |
| Quoyloo - Orkney Brewery Visitor Centre | | |
| Evie - Broch of Gurness | | |
| Brough of Birsay | | |
| Birsay - Earl's Palace | | |
| Birsay - Kirbuster Museum | | |
| Harray - Corrigal Museum | | |
| Marwick Head | | |

**Section 3: The Outer Hebrides Island Attractions**

**The next few questions will ask you about a range of attractions on the Outer Hebrides. We're interested in understanding your awareness of these attractioons and whether you visited them on you recent trip.**

**Which of these visitor attractions on Lewis have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| An Lanntair | | |
| Arnol Blackhouse | | |
| Bosta Iron Age House | | |
| Butt of Lewis | | |
| Callanish Stones | | |
| Carloway Broch | | |
| Dun Eisdean | | |
| Gearrannan Blackhouse Village | | |
| Lews Castle & Gounds | | |
| Loch Stiapabhat Nature Reserve | | |
| Norse Mill and Kiln | | |
| Museum nan Eilean | | |
| Ravenspoint Centre | | |
| Shawbost Museum | | |
| Stornoway Golf Course | | |
| Woodlands Centre | | |

**Section 3: The Outer Hebrides Island Attractions**

**Which of these visitor attractions on Harris have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Bunavoneader Whaling Station | | |
| Clisham | | |
| Luskentyre Harris Tweed | | |
| Luskentyre/Seilebost beach | | |
| Seallam Visitor Centre | | |
| St Clements Church | | |
| Teampall at Northton | | |

**Section 3: The Outer Hebrides Island Attractions**

**Which of these visitor attractions on North Uist and Berneray have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Balranald Nature Reserve | | |
| Barpa Langass | | |
| Claddach Kirkibost Centre | | |
| Eilean Domhnuill, Loch Olabhat | | |
| Langass Woodland | | |
| Pobull Fionn | | |
| Scolpaig Tower | | |
| St Kilda Viewpoint | | |
| Taigh Chearsabhagh | | |
| Teampull na Trianaid | | |
| Udal | | |
| Aird ma-Rhuibhe | | |
| Nurses Cottage | | |

**Section 3: The Outer Hebrides Island Attractions**

**Which of these visitor attractions on Benbecula have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Baille nan Cailleach | | |
| Benbecula Golf Course | | |
| Bonnie Prince Charlie Track | | |
| Borve Castle | | |
| Cula Bay | | |

**Section 3: The Outer Hebrides Island Attractions**

**Which of these visitor attractions on South Uist and Eriskay have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Askernish / Tom Morris Golf Course | | |
| Cille Pheadair | | |
| Cladh Hallan | | |
| Flore MacDonald Monument | | |
| Howmore Village and Ancient Chapel | | |
| Kildonan Museum | | |
| Loch Druidibeag Nature Reserve | | |
| Ormiclate Castle | | |
| Our Lady of the Isles | | |
| Polochar Stone | | |
| Am Politician | | |
| Eriskay Ponies | | |
| Prince Charlie Beach | | |

**Section 3: The Outer Hebrides Island Attractions**

**Which of these visitor attractions on Barra and Vatersay have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Airport Beach | | |
| Allathasdal | | |
| Allt Easdal | | |
| Barra Golf Course | | |
| Catalina Plane Site, Vatersay | | |
| Cille Bharra | | |
| Compton Mackenzie's House and Grave | | |
| Herring Walk | | |
| Kisimul Castle | | |
| Virgin and Child Statue, Heaval | | |

**Section 3: Shetland Island Attractions**

**The next few questions will ask you about a range of attractions on Shetland. We're interested in understanding your awareness of these attractioons and whether you visited them on you recent trip.**

**Which of these visitor attractions on the North Isles have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Hermaness Nature Reserve and Visitor Centre | | |
| Unst Heritage Centre & Unst Boat Haven | | |
| Viking Unst | | |
| Keen of Hamar | | |
| Hagdale Horse Mill | | |
| Muness Castle | | |
| Fetlar Interpretive Centre | | |
| Fetlar RSPB Reserve | | |
| Old Haa | | |

**Section 3: Shetland Island Attractions**

**Which of these visitor attractions in Northmavine, Lunnasting and Whalsay have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Ronas Hill | | |
| Eshaness | | |
| Tangwick Haa Museum | | |
| Lunna Kirk | | |
| Whalsay Heritage Centre | | |
| Hanseatic Booth, Whalsay | | |
| The Cabin Museum | | |

**Section 3: Shetland Island Attractions**

**Which of these visitor attractions in the Westside and Central Mainland have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Huxter Mills | | |
| Stanydale Temple | | |
| Weisdale Mill (Bonhoga Gallery) | | |
| Scalloway Museum | | |
| Scalloway Castle | | |
| Burland Croft Trail | | |
| Burra Heritage Centre (Easthouse) | | |

**Section 3: Shetland Island Attractions**

**Which of these visitor attractions in Lerwick and Bressay have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Shetland Textile Museum / Böd of Gremista | | |
| Shetland Museum and Archives | | |
| Mareel | | |
| Shetland Family History Society | | |
| Fort Charlotte | | |
| Galley Shed Lerwick: Up Helly Aa Exhibition | | |
| Clickimin Broch | | |
| Bressay Heritage Centre | | |
| Noss | | |

**Section 3: Shetland Island Attractions**

**Which of these visitor attractions in the South Mainland and Fair Isle have you heard of and which did you visit on your recent trip?**

**Please use the columns to indicate, in the first column, which attractions you have heard of and in the second column which attractions you visited on this trip.**

**NOTE: If you have not heard of any of these attractions please click 'Next' to continue.**

| | Heard of | Visited on this trip |
|---|---|---|
| Hoswick Visitor Centre | | |
| Mousa Broch | | |
| St Ninian's Isle | | |
| Croft House Museum | | |
| Quendale Water Mill | | |
| Old Scatness Broch and Iron Age Village | | |
| Jarlshof | | |
| RSPB Sumburgh Head Reserve | | |
| Fair Isle Bird Observatory | | |
| George Waterson Memorial Centre, Fair Isle | | |

**Please tick the boxes below to indicate if you took part in any of the listed activities during your recent visit to {Q1.1}.**

**NOTE: If you took part in none of these activities please click '<u>Next</u>' to continue.**

- Visits to local leisure centres
- Loch fishing
- Sea angling
- Cycling on a road/surfaced path
- Mountain biking
- Short walk - up to 2 miles
- Longer walks - over 2 miles
- Golf
- Diving
- Saliing
- Kayaking
- Rock climbing
- Watersports
- Other sporting activity
- General sightseeing/tour
- Bird watching
- Marine wildlife watching
- Other nature watching (flora/fauna)
- Family history/genealogy research
- Photography/painting
- Knitting/textiles
- Musical entertainment/activities
- Listening to traditional music
- Guided tour
- Shopping for local crafts or local products
- Other shopping
- Trying local food
- Visiting Festivals or events
- Special event - personal e.g. wedding
- Nature/wildlife sites
- Archaeological sites
- Geological sites
- Beaches/coastal scenery
- Viewpoints/picnic areas
- Other

Please type in the watersports activity you took part in

Please type in the other sporting activities you took part in

Please type in the other activities you took part in

**Of the activities you took part in during your visit to {Q1.1}which was your main activity?**

- Visits to local leisure centres
- Loch fishing
- Sea angling
- Cycling on a road/surfaced path
- Mountain biking
- Short walk - up to 2 miles
- Longer walks - over 2 miles
- Golf
- Diving
- Saliing
- Kayaking
- Rock climbing
- Watersports
- Other sporting activity
- General sightseeing/tour
- Bird watching
- Marine wildlife watching
- Other nature watching (flora/fauna)
- Family history/genealogy research
- Photography/painting
- Knitting/textiles
- Musical entertainment/activities
- Listening to traditional music
- Guided tour
- Shopping for local crafts or local products
- Other shopping
- Trying local food
- Visiting Festivals or events
- Special event - personal e.g. wedding
- Nature/wildlife sites
- Archaeological sites
- Geological sites
- Beaches/coastal scenery
- Viewpoints/picnic areas
- Other

**Section 4: Source of information for visit**

**Which of the following information sources did you use to find out about or research {Q1.1} <u>before</u> you arrived?**

- Internet/websites
- Social media (Facebook/Twitter)
- Tourist Board brochures/leaflets
- Visitor Information Centre
- Travel Agent
- Travel operators (ferries, airlines)
- Guidebooks
- Friends/relatives/advice from others
- Other information source
- None

Where was the Visitor Information Centre you used (e.g. Inverness, Glasgow)

Please describe the other source/s

**Section 4: Source of information for visit**

**Which of the following information sources did you use to find out about or research {Q1.1} <u>before</u> you arrived?**

- Internet/websites
- Social media (Facebook/Twitter)
- Tourist Board brochures/leaflets
- Visitor Information Centre
- Travel Agent
- Travel operators (ferries, airlines)
- Guidebooks
- Friends/relatives/advice from others
- Promote Shetland email/telephone
- Promote Shetland Pocket Guide
- Other information source
- None of the above

Where was the Visitor Information Centre you used (e.g. Aberdeen, Inverness)

Please describe the other source/s

**Which of the following did you research via the internet/websites**

- Accommodation
- Transport to destination
- Transport from destination
- Visitor centres/visitor attractions
- Activities
- Festivals/Events
- History/culture
- Genealogy/family history
- Natural history
- None of the above
- Other

Please describe the other research via the internet/websites

**Which of the following did you book via the internet/websites**

- Accommodation
- Transport to destination
- Transport from destination
- Visitor centres/visitor attractions
- Activities
- Festival/Event tickets
- None of the above
- Other

Please describe the other booking made via internet/websites

**Please write in the names of the websites you used to research/book your visit. Please type in the five main websites used.**

Name of website

Name of website

Name of website

Name of website

Name of website

**How satisfied were you with the each of the following aspects of planning your recent trip?**

| | Very s atisfied | Fairly s atisfied | Neither satisfie d not di ssatisfi ed | Fairly d issatisfi ed | Very di ssatisfi ed | Don't know /not rel evant |
|---|---|---|---|---|---|---|
| Availability of information online to help you plan your trip | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Availability of information off-line to help you plan your trip | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Getting to {Q1.1} | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Availability of convenient air routes to {Q1.1} | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Availability of convenient sea routes to {Q1.1} | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| The cost of travel to {Q1.1} | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |

**Please tell us why you were dissatisfied with the availability of information online to help you plan your trip to {Q1.1}**

**Please tell us why you were dissatisfied with the availability of information off-line to help you plan your trip to {Q1.1}**

**Please tell us why you were dissatisfied with getting to {Q1.1}**

**Please tell us why you were dissatisfied with the availability of convenient air routes to {Q1.1}**

**Please tell us why you were dissatisfied with the availability of convenient sea routes to {Q1.1}**

**Please tell us why you were dissatisfied with the cost of travel to {Q1.1}**

**During your recent visit to {Q1.1} which of the following methods did you use to obtain information about places to visit and things to do?**

- A smartphone/Internet on a mobile phone
- The VisitScotland Day out app
- A laptop
- An iPad/tablet PC
- Social media (Facebook/Twitter)
- Cafe with Internet access
- Accessed Internet via a terminal in your accommodation or another public area
- Visitor Information Centre
- Visitor Information Point (located in visitor attractions)
- Brochure provided by VisitScotland or Tourist Board
- Tour operator's brochure
- Guide Books (e.g. Fodors, Lonely Planet)
- Locally produced guide books
- Local heritage information (leaflets about the local area, maps, mini guides)
- Asking other travellers
- Asking locals
- Asking proprietors/service staff
- None of the above

**During and after your recent trip to {Q1.1} did you do any of the following?**

- Uploaded trip photos to the Internet (eg Flickr/Facebook)
- Updated Facebook status about your trip
- Tweeted about your trip
- Blogged about your trip
- None of these

**How satisfied were you with the each of the following aspects of your recent trip to {Q1.1}?**

| | Very satisfied | Fairly satisfied | Neither satisfied not dissatisfied | Fairly dissatisfied | Very dissatisfied | Don't know /not relevant |
|---|---|---|---|---|---|---|
| Availability of mobile phone reception | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Availability of WiFi/broadband access | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |

**Please tell us why you were dissatisfied with the availability of mobile phone reception in {Q1.1}**

**Please tell us why you were dissatisfied with the availability of WiFi/broadband access in {Q1.1}**

**Section Five: Satisfaction with Transport**

**Which of the following did you use when leaving Orkney at the end of your recent visit?**

- Kirkwall airport
- Kirkwall ferry
- Stromness ferry
- St Margaret's Hope ferry
- Burwick ferry
- None of these

**Would you recommend {Q5.1} to your family, friends or business colleagues?**

- Yes
- No

**Please tell us why you would not recommend {Q5.1} and what we can do to improve?**

**Section Five: Satisfaction with Transport**

**Which of the following did you use when leaving the Outer Hebrides at the end of your recent visit?**

- Stornoway airport
- Benbecula airport
- Barra airport
- Stornoway ferry
- Tarbert ferry
- Lochmaddy ferry
- Lochboisdale ferry
- Castlebay ferry
- None of these

**Would you recommend {Q5.4} to your family, friends or business colleagues?**

- Yes
- No

**Please tell us why you would not recommend {Q5.4} and what we can do to improve?**

**Section Five: Satisfaction with Transport**

**Which of the following did you use when leaving Shetland at the end of your recent visit?**

- Sumburgh airport
- Holmsgarth (Lerwick) ferry
- None of these

**Would you recommend {Q5.7} to your family, friends or business colleagues?**

- Yes
- No

**Please tell us why you would not recommend {Q5.7} and what we can do to improve?**

## Section Five: Satisfaction with Transport

**How satisfied were you with the following aspects of your transport to and in {Q1.1}?**

| | Very satisfied | Fairly satisfied | Neither satisfied not dissatisfied | Fairly dissatisfied | Very dissatisfied | Don't know /not relevant |
|---|---|---|---|---|---|---|
| Cost of travel in {Q1.1} | | | | | | |
| Value for money of public transport, including local buses and inter-island ferries | | | | | | |
| Quality of public transport | | | | | | |
| Availability of public transport | | | | | | |

**Please tell us why you were dissatisfied with the cost of travel in {Q1.1}**

**Please tell us why you were dissatisfied with the value for money of public transport in {Q1.1}**

**Please tell us why you were dissatisfied with the quality of public transport in {Q1.1}**

**Please tell us why you were dissatisfied with the availability of public transport in {Q1.1}**

## Section Six: Accommodation

**What type of accommodation did you stay in during this recent visit to {Q1.1}. If you stayed in more than one type of accommodation, please select the type that you stayed in for the longest.**

- Hotel (5 star/luxury)
- Hotel (4 star)
- Hotel (3 star)
- Hotel (1-2 star)
- Guest house/bed and breakfast
- Self-catering - rented house/cottage/chalet
- Hostel
- Camping Böd
- Static caravan
- Touring caravan pitch at serviced campsite
- Tent at serviced campsite
- Tent (non-campsite)
- Motorhome at serviced campsite
- Motorhome (non-campsite)
- Staying with friends/family
- Second home
- Other

Please type in other accommodation

**Thinking about the accommodation you stayed in, how satisfied were you with the following aspects of your accommodation? If you stayed in more than one accommodation, please comment on the one you stayed in longest.**

| | Very satisfied | Fairly satisfied | Neither satisfied not dissatisfied | Fairly dissatisfied | Very dissatisfied | Don't know /not relevant |
|---|---|---|---|---|---|---|
| Quality of accommodation | | | | | | |
| Friendly and efficient service | | | | | | |
| Value for money of accommodation | | | | | | |

**Please tell us why you were dissatisfied with the quality of accommodation {Q1.1}**

**Please tell us why you were dissatisfied with the friendly and efficient service {Q1.1}**

**Please tell us why you were dissatisfied with the value for money of accommodation {Q1.1}**

## Section Seven: Overall Satisfaction

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

| | Very satisfied | Fairly satisfied | Neither satisfied not dissatisfied | Fairly dissatisfied | Very dissatisfied | Don't know /not relevant |
|---|---|---|---|---|---|---|
| Value for money of dining out | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Availability of local produce when dining out | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Availability of information locally about places you could visit during your trip | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Quality of visitor attractions, historic sites, museums, visitor centres, etc | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Value for money of visitor attractions, historic sites, museums, visitor centres, etc | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Opportunities to attend local events/festivals | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Quality of local arts and crafts products | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Value for money of local arts and crafts products | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Quality of local food and drink products | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |
| Signposting | ◯ | ◯ | ◯ | ◯ | ◯ | ◯ |

**Please tell us why you were dissatisfied with the value for money of dining out in {Q1.1}**

**Please tell us why you were dissatisfied with the availability of local produce when dining out in {Q1.1}**

**Please tell us why you were dissatisfied with the availability of information locally about places you could visit during your trip to {Q1.1}**

**Please tell us why you were dissatisfied with the quality of visitor attractions, historic sites, museums, visitor centres in {Q1.1}**

**Please tell us why you were dissatisfied with the value for money of visitor attractions, historic sites, museums, visitor centres in {Q1.1}**

**Please tell us why you were dissatisfied with the opportunities to attend local events/festivals in {Q1.1}**

**Please tell us why you were dissatisfied with the quality of local arts and crafts products in {Q1.1}**

**Please tell us why you were dissatisfied with the value for money of local arts and crafts products in {Q1.1}**

**Please tell us why you were dissatisfied with the quality of local food and drink products in {Q1.1}**

**Please tell us why you were dissatisfied with signposting in {Q1.1}**

**How likely are you to visit {Q1.1} in the next five years for a leisure holiday or short break?**

- ◯ Very likely
- ◯ Fairly likely
- ◯ Neither likely nor unlikely
- ◯ Fairly unlikely
- ◯ Very unlikely

**What could {Q1.1} tourism industry do to improve your visitor experience or encourage you to visit again?**

**Was there any activity you felt was not provided for adequately on {Q1.1} or not provided at all?**

**Overall, has your recent visit to {Q1.1} met, exceeded or failed to meet your expectations?**

- Exceeded expectations
- Met expectations
- Did not meet expectations
- Not sure/can't say

**Would you recommend {Q1.1} as a holiday destination?**

- Yes
- No
- Don't know

**What was the highlight of your recent visit to {Q1.1} or the single thing thing that you enjoyed or appreciated most?**

**Section Eight: Please tell us about you**

**What gender are you?**

- Male
- Female

**Which of the following age groups are you in?**

- 16-24
- 25-34
- 35-44
- 45-54
- 55-64
- Over 65
- Prefer not to say

**Where do you normally live?**

- Scotland
- England
- Wales
- Northern Ireland
- Other UK
- Republic of Ireland
- Norway
- France
- Germany
- Italy
- Spain
- Netherlands
- Other Europe
- USA
- Canada
- Australia
- New Zealand
- Other country

Please type in other European country

Please type in other country

**Section Nine: Details of Group/Party**

**Which of these best describes who was with you on your trip to {Q1.1}?**

- Travelling alone
- Partner/spouse
- With child/children
- With parents or partner's parents
- Other members of family
- Friends
- With organised group/tour
- Business/work colleagues
- Someone else

Who else is with you on your trip?

**How many people, including yourself, were in your immediate group or party visiting {Q1.1}?**

**If you would like to be entered in the prize draw for an iPad, please confirm your email address. Your email will only be used for the purposes of the prize draw and not for any other purpose.**

**Thank you for completing the questionnaire. Please now press submit to ensure we receive your response.**

## APPENDIX 3: FACE-TO-FACE CALIBRATION SURVEY QUESTIONNAIRE

**ISLANDS CALIBRATION SURVEY – ORKNEY ISLANDS**

Interviewer name (print): ________________________ Signature ________________________ Date ________________________ (one sheet per date)

A. Day of the week (print): ________________________ B. Interview location: Airports – **Kirkwall** (circle location)
Ferries – **Kirkwall / Stromness / St Margarets Hope / Burwick**

Good morning/afternoon/evening, my name is ....... from the independent research agency, Scotinform Ltd. We are carrying out an audit of visitors as they leave the Orkney Islands on behalf of the Scottish national tourism organisation, VisitScotland, Highlands and Island Enterprise and the Orkney Islands Council. **ENSURE RESPONDENT IS DEPARTING TO A RELEVANT DESTINATION (See note below)**

**1 How many people, including yourself, are in your immediate group or party?**

| **WRITE IN NUMBER, INCLUDING RESPONDENT** | **a.** | **b.** | **c.** | **d.** | **e.** | **f.** | **g.** | **h.** | **i.** | **j.** | **k.** | **l.** | **m.** | **n.** | **o.** |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | | | | |

**2 Where do you normally live?**
**ONE ANSWER ONLY**

| | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| The Orkney Islands…………………… | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | **CLOSE** |
| Scotland………………………………… | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | **ASK Q3** |
| Other UK - Eng/Wal/NI……………… | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | **ASK Q3** |
| Overseas……………………………… | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | **ASK Q3** |

**3 Which of these best describes your current visit to Orkney?**
**ONE ANSWER ONLY**

| | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| On holiday/leisure trip – overnight… | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| On holiday/leisure trip – day trip…… | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Visiting friends/relatives – overnight | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Visiting friends/relatives – day trip… | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| On business trip – overnight………… | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 |
| On business trip – day trip…………… | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 |
| No-in transit, not visiting Orkney…….. | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 | 7 |

**THANK RESPONDENT**

*For information only.*
RELEVANT DEPARTURE DESTINATIONS: **Ferry**: Aberdeen, Lerwick, Scrabster, Gills Bay, John O' Groats. **Flight**: Aberdeen, Bergen, Edinburgh, Glasgow, Inverness, Sumburgh.