

Orkney Islands Visitor Survey 2024 – Summary of Leisure Visitors

Introduction

The Orkney Islands Visitor Survey was conducted by Progressive Partnership on behalf of Orkney Islands Council and VisitScotland to enhance understanding of visitor behaviour and experience. The survey was conducted between April and October. In total, 1,936 visitors were interviewed at Kirkwall Airport and Hatston, St Margaret’s Hope and Stromness ferry terminals, with 708 responding to an online survey on their return home. A further 6 visitors completed the survey by accessing it via a QR code on posters at Kirkwall Airport and the ferry terminals.

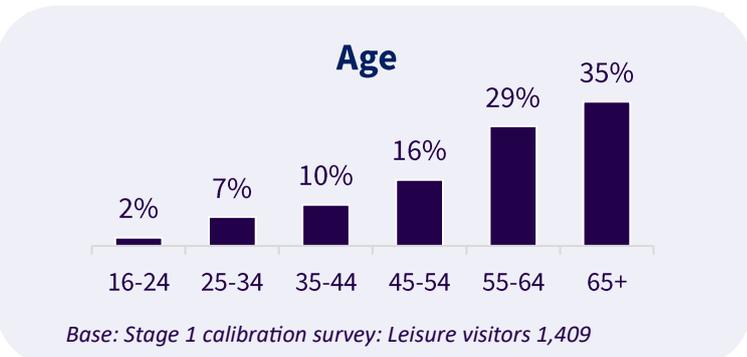
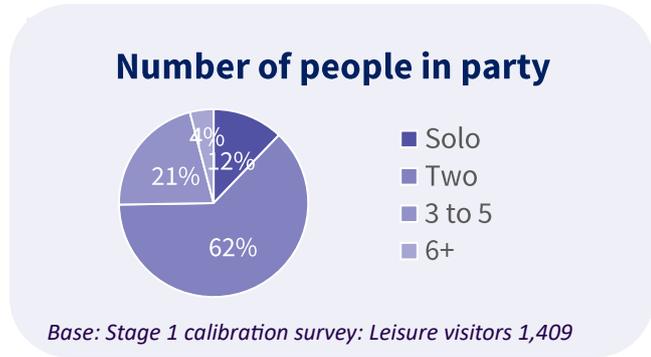
With the exception of the data relating to visit type and volume and value which covers all visits, this summary report provides data on the profile, experiences and satisfaction of Leisure visitors to Orkney.

Volume and value of visits to Orkney in 2024 (all visits)



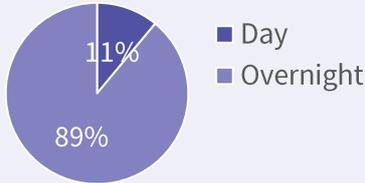
Estimated total visits to Orkney in 2024: 173,000
 Average spend per person in peak months (Apr – Oct): £464
 Estimated total value of visitor spend in 2024: £77.9 million

Profile of visitors



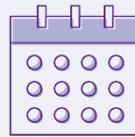
Profile of trip

Day or overnight visitor



Base: Stage 1 calibration survey: Leisure visitors 1,409

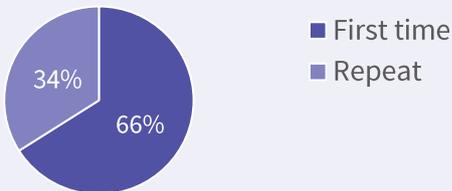
Number of nights



Orkney Leisure visitors stayed on average: 4.8 nights in Orkney

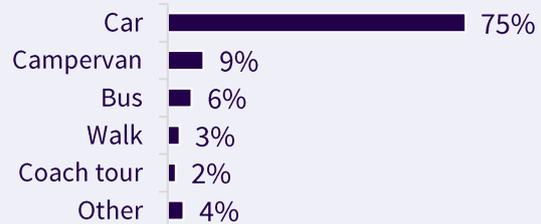
Base: Stage 1 calibration survey: Leisure overnight visitors 1,259

First time or repeat visitor



Base: Stage 2 online survey: Leisure visitors 571

Main transport on Orkney



Base: Stage 2 online survey: Leisure visitors 571

Reasons for choosing Orkney

No.	Top 10 reasons for choosing Orkney	Leisure visitors
1	The scenery and landscape	59%
2	The history, culture and heritage	57%
3	Orkney is a place I have always wanted to visit	54%
4	To visit a particular attraction	46%
5	The wildlife (e.g. wild birds, otters, orcas)	38%
6	Holidayed in Orkney before and wanted to do so again	28%
7	I have an interest in archaeology	27%
8	To get away from it all	21%
9	The Vikings history	21%
10	Orkney's reputation for friendly people	11%
Base: Stage 2 online survey: Leisure visitors		571

No.	Top 10 inspirations for visiting Orkney	Leisure visitors
1	Conversations with friends or family	42%
2	Online information, etc. from VisitScotland	22%
3	Online information, etc. from www.orkney.com	19%
4	Printed travel guide books or brochures	18%
5	Info from travel bloggers, influencers, etc.	13%
6	Online information from transport providers	13%
7	TV programmes featuring Orkney	11%
8	Newspapers or magazines	7%
9	Peer review websites (e.g., TripAdvisor)	6%
10	Online travel feature providers Online travel guides Book or literature featuring Orkney	6% 6% 6%
Base: Stage 2 online survey: Leisure visitors		571

Type of accommodation stayed in

41% stayed in serviced accommodation



23%

Hotel, motel, inn



17%

Guest house, B&B



7%

Hostel

58% stayed in non-serviced accommodation



33%

Self-catering/ commercial non-serviced rentals



18%

Camping, caravan, motorhome



5%

Friend's or relative's home

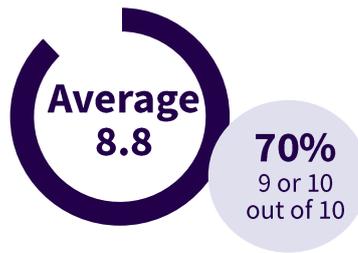
Base: Stage 2 online survey: Overnight Leisure visitors 524 NB. Percentages may not add to 100% due to rounding

Satisfaction with accommodation

Satisfaction with... (Scored out of 10)



Overall welcome provided to you



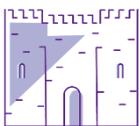
Friendly and efficient service



The value for money of accommodation

Base: Stage 2 online survey: Overnight Leisure visitors in paid for accommodation excl. n/a 398-419

Attractions and activities undertaken on Orkney



Top 5 attractions and activities undertaken/visited in Orkney

No.	Top five attractions visited in Orkney	Leisure visitors
1	Ring of Brodgar	82%
2	Skara Brae	75%
3	St Magnus Cathedral	69%
4	Italian Chapel	61%
5	Public museums/heritage centres	50%

Base: Stage 2 online survey: Leisure visitors **571**

No.	Top five activities undertaken in Orkney	Leisure visitors
1	Short walk – up to 2 miles	71%
2	Beaches/coastal scenery	68%
3	Archaeological sites	63%
4	Shopping for local crafts or products	59%
5	Self-guided touring / sightseeing	52%

Base: Stage 2 online survey: Leisure visitors **571**

Satisfaction with attractions on Orkney

Satisfaction with... (Scored out of 10)

Knowledge and passion of the staff at attractions



Quality of experience at attractions



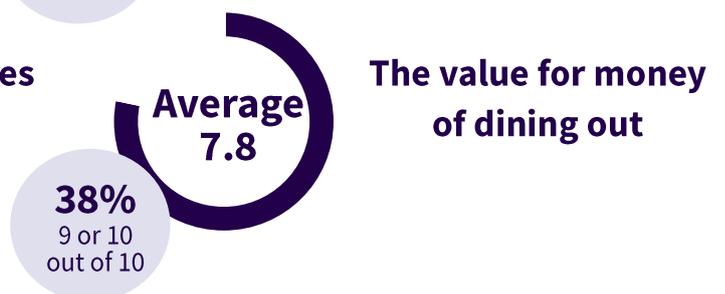
Value for money of paid for attractions



Base: Stage 2 online survey: Leisure visitors that visited an attraction, excluding 'unsure' 514-535

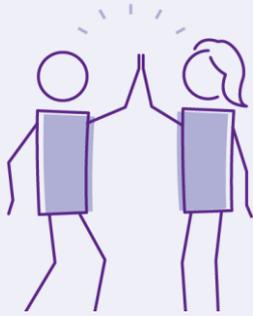
Satisfaction with food and drink experiences on Orkney

Satisfaction with..... (Scored out of 10)



Base: Stage 2 online survey: Leisure visitors excluding 'unsure' 504 - 529

Experiences with local people on Orkney



I was made to feel really welcome

95% agree

I experienced excellent customer service

91% agree

The local people I met really added to the holiday experience

88% agree

Base: Stage 2 online survey: Leisure visitors excluding 'unsure' 557 - 566

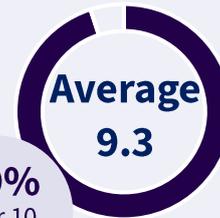
Overall experience and likelihood to recommend Orkney

Positive rating of holiday/short break experience



79%
9 or 10 out of 10

Likelihood to recommend as a holiday/short break destination



79%
9 or 10 out of 10

Base: Stage 2 online survey: Leisure visitors excluding 'unsure' 571/569

What visitors said

A small number of comments have been shown to give a flavour of what visitors said. Not all visitors left a comment.

We loved absolutely everything about Orkney. The number of neolithic remains was a surprise. We would have loved to have had longer on Orkney to really enjoy everything on offer, as well as to visit the other islands.

The scenery is incredible, we had amazing weather during our visit which helped immensely. Everyone we met was really friendly and welcoming. The food at local cafes was always lovely.

The archaeology and ancient sites are amazing and the ability to visit many unguided was welcome. I hadn't anticipated such a lot of farming being more used to peat, heather and west Scotland trips. The cliff top walks along the west coast were stunning.

The culture. Exploring and learning about Orkney's history. Meeting friendly people. Orkney just feels like home. People welcoming you with a smile and speaking to you like they have known you for years. Such a beautiful part of the world.

There were four large cruise ships visiting during our visit. This made it difficult for us to obtain tickets to certain historic sites (e.g. Skara Brae) and to obtain bookings for dinner at restaurants.

The Peatfire Tales of Orkney was not only the highlight of my Orkney visit, but one of the highlights of my entire 6-month trip. I also LOVED the library in Stromness - it has beautiful views, all the necessary facilities, and a lovely, relaxed environment.

Appendix – Interpreting the results

- The data from this survey provides the most representative and robust view of the volume and value of tourism to the Orkney islands as well as an evaluation of the visitor experience.
- The Orkney Visitor Survey was undertaken between April and October only, based on a need to gather visitor views in an efficient manner. This means the results reflect the views of those visiting Orkney between April and October 2024 only.
- The travel operators provided departing passenger numbers for 2024 to be used to assist with the calculation of the volume and value of visitors to Orkney.
 - Volume of passengers: A combination of the proportion of visitors measured by the calibration survey conducted in the peak months (April to October 2024) and an estimation of the proportion of visitors in the off-peak months (January to March, November and December 2024) based on 2019 data (a full 12 months of the survey was conducted in 2019).
 - Value of passengers: Average spend figures, provided in the online survey, have been applied to visitor volume in order to calculate the total value of visits to Orkney in the peak months (April to October 2024). To calculate the value of visits in the off-peak months, the ratio of off peak to peak average spend per person measured in 2019 was applied to the peak months' average spend data in 2024. This provided an estimated average spend figure for the off-peak months. This was applied to off-peak visit numbers in 2024. The average spend in the peak months and off-peak months were combined to provide an estimate of total annual visitor spend for 2024.
- The sample excluded: cruise ship visitors, people travelling on a private yacht and those in transit to another destination.
- The base size varies across questions, depending on questionnaire routing.
- Both face-to-face and online data were weighted to reflect passenger numbers across Kirkwall Airport and St Margaret's Hope, Stromness and Hatston Ferry Terminals (calibration data) and the profile of visitor type and origin measured in the calibration interviews (online data).

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