

Appendix 1. Our Orkney, Our Story Report

Our Orkney Our Story

Prepared by Niteo Development Ltd, January 2026



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Our Orkney Our Story

“Orkney is a special place.”

“What matters most to me and other people I have talked to is that we as citizens of Orkney are involved in the decision-making process of what happens on our islands.”

“A better balance needs to be sought.”

1. Context

Orkney welcomes over 450,000 visitors each year, contributing more than £114 million to the local economy. Tourism plays a vital role in our economic and social life – supporting jobs, sustaining businesses, and celebrating our rich natural and cultural heritage. However, as visitor numbers grow, so too do the pressures on public services, infrastructure, the environment, and the communities who call Orkney home.

Orkney Islands Council (OIC) is beginning work on a new Visitor Management Plan (VMP) – one that aims to guide the future of tourism in a way that is sustainable, regenerative, and rooted in community wellbeing, while also addressing the pressures placed on council-led services and infrastructure.

This report was commissioned to support the development of the Visitor Management Plan by identifying and prioritising current and emerging tourism pressures, drawing on both the expert knowledge of industry and public sector stakeholders and the tacit knowledge held within the community.

The findings give a clear idea of the perceived successes, pressures, and challenges that tourism brings to Orkney. It is important to note that the findings are based on perception data. While perceptions often come from empirical evidence, they are also important in their own right as they drive responses, actions and further perceptions and engagement. The subjective experience and people’s sentiments around an issue matter deeply, not just in as far as how people feel, but also how they engage and what solutions can be found. This perception data forms a valuable part of the evidence base for the Visitor Management Plan.

2. Method

The approach for this work was one of narrative inquiry, focusing on collecting and interpreting the stories people share about their lived experiences of tourism in Orkney. This encompasses both written narratives and photographs that visually express these experiences. This method values not only the content of these narratives but also the ways individuals perceive, feel, and derive meaning from their experiences, aligning with phenomenological research principles.

The process was participatory, engaging the broader community's lived experiences. A subset of the community was actively involved in shaping the research through a reference group, ensuring the study remained grounded in local contexts and perspectives. This group included representatives from industry (such as Destination Orkney, Orkney Tourist Guides Association (OTGA), and local operators), the community, and public sector partners (including OIC), with representation from both the Mainland and the isles.

In addition, more traditional research methods, such as one-on-one and group interviews, were employed to capture the perspectives of key public sector and industry stakeholders. By integrating narrative inquiry with phenomenological research and participatory methods, this approach aims to provide a comprehensive understanding of the community's perceptions, experiences and insights, ensuring that the research outcomes are both meaningful and actionable.

Perception matters. Orkney is a deeply connected community and perception informs people's attitudes, actions and engagement. Any Visitor Management Plan needs to take into account these perceptions in order to move towards a truly sustainable and effective delivery of tourism in Orkney.

3. Engagement

Across the different conversations, there were a total of 249 individual contributions to the community stories survey, 46 participants in the individual stakeholder conversations, and 42 participants at the community and industry workshops. This led to a total of 866 individual perception contributions and 133 suggested actions.

Triangulation between survey responses and stakeholder interviews shows that key themes and concerns align, giving validity to the data. While there were no major surprises in the issues raised, nuanced contributions added depth and helped explain sentiment, reinforcing facts already known. The research can therefore be considered robust despite relatively low community engagement.

4. Key findings

Overwhelmingly there was positivity towards tourism in Orkney as a principle. It was recognised that tourism is something that Orkney can do well and that is a valuable asset to its communities, economy and way of life. There was appreciation of the many and varied attractions that Orkney offers tourists, the welcome that Orkney offers, and the range of different types of tourist that Orkney attracts.

From this there was an equally overwhelming feeling that the balance of managing tourism in Orkney has shifted and is becoming, or has already become, unsustainable and unbalanced. There was a perception that overall planning and strategy were lacking and that this has resulted in reactive responses that places volume and numbers over any other consideration. Key concerns that came up across the data were:

1. Communication

- Specifically communication from OIC and Harbours out to the community, particularly around cruise numbers, benefits and how the money from cruise is spent.
- Transparency – decisions made but not communicated, key voices not being heard.
- Clear signposting and communication for visitors around how to engage respectfully and sustainably with the destinations.
- Worries around the closure of the Visitor Information Centre and other tourist information sites

2. Sustainability

- Cruise numbers – the need to be more discerning and look at value not just volume.
- Heritage sites – balancing the need to preserve these with the visitor impact.
- Short term lets and its impact on housing – particularly the lack of available housing in Kirkwall and Stromness and planning systems that don't address this.
- The “unseen” impact on NHS Orkney of cruise passengers using the hospital, GPs and pharmacies above and beyond planned capacity.
- A fear that short termism is in danger of ‘killing the goose that lays the golden egg’.

3. Disempowerment of community

- Decisions made without sufficient consultation or information-sharing
- A feeling of being ‘done to’ rather than ‘done with’.

4. Infrastructure concerns

- Campervan facilities – not enough or not used effectively, including use of car parks not set up to be informal campervan sites.
- Roads, parking & public transport – not sufficient for the needs of the coaches and large volumes of people. Ferry-linked isle residents are disproportionately impacted by how bookings are managed.
- Toilets – including availability of public toilets in key areas, waste disposal for coach and campervans and toilets on coaches.
- Cycle paths and footpaths – not sufficient or prioritised sufficiently.
- Connectivity and a lack of joined-up thinking.

5. Urgency

- A sense that action must be quick and decisive: the balance needs to be redressed quickly and effectively.

5. Key Actions

The actions are those that emerged from the community workshops, not recommendations from this report.

Actions varied from small easily achieved ‘quick wins’ to multi-stakeholder long term actions. There was a predominant feeling that a transparent and communicative team in OIC to oversee a community-focused tourism strategy was essential. Actions covered all the themes brought up in the research data with a strong perception that things had to change quickly and that the new Visitor Management Plan (VMP) needed to take into account community feelings to create a balanced and sustainable approach that was transparent, accountable and comprehensive.

This report does not present recommendations or conclusions.

There follows the detailed data from the three separate methodologies of data gathering and action planning.

6. Community Stories: detailed theming

6.i. Method

An online storytelling platform was used to enable residents and visitors to share their experiences of Orkney during the 2025 season.

The platform did not ask explicit questions about any particular aspect of tourism in Orkney. Instead, participants were invited to submit stories and photographs about their own experiences of tourism, along with reflections on what mattered most to them and what they would like to see happen as a result of their story or experience.

The online platform was open from early August to late September 2025 and received 237 submissions, many of which included multiple stories or images. In total, this generated 443 individual story, experience, reflection or idea statements. Of the 237 submissions, 92% were from residents and 8% from visitors. Ninety per cent of stories related to experiences on the mainland and causeway-linked islands, with 10% relating to the ferry-linked isles.

While there were no discernible differences in themes between the mainland and causeway-linked islands, some issues were specific to the ferry-linked isles, Kirkwall, the West Mainland and the World Heritage Site areas. These are set out in the report findings.

Analysis approach

Stories were manually reviewed and grouped into related clusters to preserve. This qualitative coding produced ten thematic clusters (themes), each representing a distinct area of community experience and perception:

- **Appreciation** – positive reflections on tourism’s value, pride in place and welcome.
- **Community impact** – effects on daily life, access and sense of belonging.
- **Community engagement and benefit** – fairness, inclusion and community-led approaches.
- **Scale and management of coach and cruise tourism** – issues of volume, capacity and behaviour related specifically to coach and cruise tourism.
- **Economic impact** – perceptions of costs, benefits and distribution of income.
- **Environmental and heritage concerns** – stewardship of landscapes, heritage and wildlife.
- **Housing and short-term lets** – effects on availability, affordability and local cohesion.
- **Infrastructure, visitor facilities and transport** – adequacy of amenities and connectivity.
- **Campervans not using designated sites** – management, facilities and environmental impact.
- **Leadership, governance and strategy** – transparency, accountability and future direction.

Following the manual coding, AI-assisted sentiment and frequency analysis was used to provide a consistent assessment of tone and emphasis across all themes.

Sentiment analysis

Sentiment analysis captured the emotional tone of comments – whether positive, neutral or negative – reflecting how people feel about each issue (for example, pride, frustration or cautious optimism). Because participants were encouraged to offer ideas for improvement, many comments are expressed in neutral or constructive terms rather than as simple approval or criticism.

Each theme is described using a five-point qualitative scale:

- **Predominantly positive** – comments show clear satisfaction, pride or approval.
- **Mixed, leaning positive** – balanced but with optimism or solution-focused tone.
- **Neutral or descriptive** – largely factual, low emotional content.
- **Mixed, leaning negative** – generally critical but often constructive.
- **Predominantly negative** – strong dissatisfaction or fatigue.

This approach highlights both polarity and intent — showing where community sentiment reflects frustration, pride or practical problem-solving energy.

Frequency analysis

Frequency was assessed by the proportion of comments within each theme out of the total dataset (n = 443). Cluster frequencies range from 4% to 20%. To support consistent interpretation, the following scale was applied:

- **Low frequency** (<6%) – raised by fewer participants or in specific contexts.
- **Moderate frequency** (6-10%) – recurring but not dominant issues.
- **Moderate to high frequency** (11-15%) – strong and sustained attention across stories.
- **High frequency** (16-20%) – major, cross-cutting areas of discussion.

Together, the sentiment and frequency measures provide a balanced view of the depth and breadth of community perspectives – showing where concerns are most strongly felt and where ideas for change are most widely shared.

Direct quotes from community stories are included throughout the report to illustrate key themes in participants' own words, capturing the tone, depth and lived experience behind the data.

6.ii. Summary insights and cross cutting themes

Analysis of community stories highlights a set of interconnected strategic issues that run across all ten themes. Together, they provide a picture of how residents view the opportunities and pressures created by tourism and what they believe is needed to achieve a sustainable balance between visitors, place and community life.

1. Balancing economic benefit and community wellbeing

Across the dataset, people recognise the importance of tourism to Orkney's economy and employment, but they also express concern that its growth has outpaced local infrastructure and services. The central message is not opposition to tourism but a call for balance – ensuring that economic gain does not come at the expense of housing, environment and heritage and the community wellbeing. Contributors want to see more visible reinvestment of tourism income in the facilities and services that residents and visitors share.

2. Managing day and overnight visitor patterns

Cruise and coach tourism feature strongly in the stories and together account for about half of all comments, directly or indirectly. The issue most often raised is the concentration of day visitors at particular sites, places and times – the pressure this creates on roads, public spaces and local amenities, and the resulting sense of overwhelm. Alongside these practical concerns sits a wider unease that the scale and intensity of day visits are beginning to damage Orkney’s tourism brand – discouraging overnight visitors and repeat guests who value its sense of space, quality and tranquillity. The overall message is a wish for more managed visitor flow – through limits, scheduling, dispersal and improved infrastructure – so that both visitor types can coexist comfortably and sustainably.

3. Pressure on infrastructure and essential services

Concerns about capacity and maintenance run through almost every theme. Roads, toilets, ferries, waste management and public transport are all seen as struggling to keep pace with visitor demand. People describe the effects of this on daily life — from congestion to missed appointments — and are frustrated that revenue from tourism is not more visibly reinvested in core services. The message is practical and consistent – before welcoming further growth, Orkney needs to strengthen the foundations that support residents and visitors alike.

4. Leadership, trust and transparency

Many contributors express frustration with decision-making, particularly around how information is shared and how tourism strategy is developed. There is a perception that key decisions are made without sufficient local involvement, and that consultation does not always lead to change. Alongside this frustration sits a clear desire for improvement – for open communication, accessible data and shared responsibility across public bodies, businesses and communities. People want leadership that is visible, accountable and focused on Orkney’s long-term resilience.

5. Protecting Orkney’s character and environment

Beneath many of the practical concerns lies a deeper sense of care for what makes Orkney distinctive. Residents are proud of the islands’ landscape, heritage and welcome, but fear that these qualities could be eroded if growth continues without stronger safeguards. This theme unites environmental, cultural and community perspectives – a shared wish to ensure that Orkney remains a place of authenticity, heritage and belonging – for those who live here and those who visit.

6.iii. Detailed themes

1. Appreciation of tourism

Community stories reflect a deep sense of pride in Orkney and appreciation of the visitors who come to experience it. Many describe tourism as part of what keeps the islands vibrant – bringing energy, diversity and a welcome “buzz.” People speak warmly of meeting visitors from around the world, enjoying the chance to share local traditions and hear other perspectives. Several express pride in the quality of the visitor experience, the friendliness of local people and the positive feedback received from guests.

“I’m Orcadian and am really proud of the high-quality visitor experience we provide and how welcoming our community is to tourists. I want people to come to Orkney and to have a great time.”

“I love the extra buzz around the island and especially in Kirkwall during busier days. There is an exciting atmosphere as people from all nationalities chatter, take pleasure in our sights, shops and craft fairs.”

“I love seeing the buzz tourists create on the main streets. It’s fabulous to see them alive with people going in and out of our lovely shops, cafés and restaurants.”

Comments also highlight the joy of sharing Orkney’s landscapes, wildlife and heritage. Respondents describe the islands’ beauty and tranquillity as a source of pride, emphasising the need to keep them accessible, affordable and well cared for.

Sentiment: Predominantly positive, reflecting strong pride in Orkney and genuine warmth toward visitors.

Frequency: Moderate. Around 8% of all comments (35 out of 443) relate directly to appreciation of visitors and the positive orientation of tourism. While smaller in scale than the more operational themes, this cluster provides important balance – capturing the goodwill, pride and hospitality that shape Orkney’s identity as a welcoming destination.

2. Economic impact

Community stories highlight both the importance of tourism to Orkney’s economy and growing concern about who benefits and at what cost. For many contributors, tourism – including cruise and coach visitors – is described as the lifeblood of local businesses, supporting shops, cafés, tour guides and makers. Several note that “without tourism, the high street wouldn’t exist,” and see visitor spending as vital to keeping employment and services viable across the islands. Those working in the cruise sector speak passionately about the jobs and income it sustains.

“A lovely busy high street that’s there because of tourism, particularly cruise ship passengers.”

“You only need to visit the piers at Hatston or Kirkwall on a cruise day to see how many jobs are created by this industry. You only need to visit towns across the Pentland Firth to see what we would become without tourism. The high street we have today simply would not exist without it.”

“Working in a business in Kirkwall, we would simply struggle to survive without the tourists and cruise ships. I’m all for the cruise ships and tourists. We need them to keep businesses thriving.”

Some businesses, however, feel negatively affected by cruise days when locals avoid town.

“I am a business owner, and one-day tourism this year has been highly detrimental to my business.”

“Small businesses like my own are feeling overlooked and are quieter on liner days because people avoid the busy areas. As a result, tourists aren’t passing the shops and workshops.”

Positive views are also balanced by concerns about fairness, distribution and sustainability. Some residents argue that too much visitor spend “leaks out” through externally owned companies and that benefits are unevenly shared. Others accept the economic advantages but feel they come at an unacceptably high price.

“The council and tourism folk need to stop throwing around ‘economic benefits’ as if that somehow makes the impacts on our community and environment okay.”

“While tourism can be good for the economy, there is a high price to pay in the environmental impact of masses of tourists visiting the sites. A better balance needs to be sought.”

“Folk living here with businesses are greedy and can only look at how much money they can make. Whereas most born-and-bred Orcadians care about our homeland and the damage being done to it by tourists.”

Comments reveal a clear divide in opinion on cruise and coach tourism. One group sees it as essential to Orkney’s economy; the other views it as economically extractive, crowding out longer-stay visitors and eroding the quality of both visitor and resident experience. There is concern from some that cruise tourism is now eroding overnight tourism, with accommodation providers and longer-stay visitors themselves describing the negative effects of Orkney’s changing visitor mix.

“I have for decades been worried about the effects of cruise liners on Orkney’s quality and, indeed, survival. Last season, so many long-term, faithful visitors said they would not be returning. They could not cope with the invasion of Kirkwall and the popular sites.”

“Orkney risks the ‘killing the goose’ scenario by prioritising mass tourism over the value of those who choose to stay overnight. Our tourism offer was built on quality, not quantity.”

“You have a wonderful island with an amazing history, but you are ruining it with the huge number of cruise visitors flooding the historic sites... After our last two experiences, we have already booked another Scottish location for next summer.”

Sentiment: The tone across this theme is mixed, combining strong support for tourism’s economic role with deep concern about its current scale and structure.

Frequency: Moderate to high. Around 11% of all comments (47 out of 443) relate directly to tourism’s economic impact. It forms a key part of the wider conversation about how tourism is managed and who benefits.

3. Scale and management of coach and cruise tourism

Much of the day-to-day impact of tourism on residents is covered in community impact theme. This section focuses on specific issues linked to cruise and coach tourism.

a. Coach volume and behaviour

Community stories show frustration with the volume and behaviour of large tour buses, especially on single-track and residential roads in the West Mainland and causeway linked isles. Many describe near misses and intimidating encounters with vehicles too large for the

road network, linking these to deteriorating road conditions and damaged verges. There is also resentment that local people bear the cost of repair and disruption while off-island operators profit and contribute little to the local economy.

Respondents mention congestion, noise and idling engines near homes and heritage sites, and call for stronger regulation and coordination. They want tourism managed in a way that protects safety, environment and access – through smaller vehicles, clearer guidance on routes, better scheduling to avoid congestion in villages such as St Margaret’s Hope, and a shared sense of responsibility between operators and the community. Some suggest a mandatory code of conduct or charter to formalise expectations.

“Coaches are travelling on roads that are far too narrow... West Mainland is horrendous with them using all the single-track roads. Far too many tourists for the size of Orkney.”

“The number of cruise liner buses attempting to visit St Margaret's Hope at the same time ... could their visits be better staggered?”

“There should be a new charter with tour bus operators to agree the rights and responsibilities of access for large vehicles and groups. It needs to be developed collaboratively and then applied on a mandatory basis – no access without responsibility.”

b. Impact on other visitors

Stories suggest that the scale of coach and cruise tourism is beginning to affect the experience of other visitors as well as residents. Independent travellers, repeat visitors and small-group tour operators describe frustration at overcrowded sites and a sense that Orkney’s most special places are being compromised by volume visits.

Many recount being unable to access key heritage attractions, while some note that mass arrivals diminish the quality of experience for everyone. Some propose better scheduling, smaller groups and improved site management, stressing that while tourism is welcomed, the current scale makes it difficult for locals and longer-stay visitors to enjoy the same spaces.

Taken together, these stories point to a growing tension between day visitors arriving in large numbers and those who stay longer or return regularly. Both groups are valued, but their experiences are increasingly shaped by the pressures of access and crowding. Comments underline the need to manage sites and visitor flow more carefully so that the quality of experience continues to reflect Orkney’s heritage, tranquillity and welcome.

“I welcome tourism in Orkney, but locals and returning visitors are finding it increasingly difficult to access many of our own places of interest.”

“Some areas are now so busy with multiple coach loads of tourists that it’s impossible to enjoy them – at times there can be five buses at the Ring of Brodgar all at once.”

c. Cruise cycle groups

Respondents express strong concern about the safety of cruise passengers cycling on Orkney’s roads. Long lines of visitors travelling on the Stromness to Kirkwall road are described as impossible to overtake and “an accident waiting to happen.” Residents note that this issue persists despite earlier guidance to operators and want clearer rules about road safety and route choice.

“The cruise liner passengers who go out on bikes in groups are just not safe and will cause an accident shortly... OIC will be held to blame by locals.”

d. Visitor behaviour and respect for place

Many residents highlight poor visitor behaviour and a lack of respect for local norms of safety and courtesy. Stories describe passengers stepping into roads without looking, blocking traffic and treating Kirkwall “as if it were a theme park.” Others recount visitors entering St Magnus cathedral during funerals or crowding shop doorways, creating frustration that the behaviour of large groups reflects poorly on local visitor management rather than on individuals.

“Passengers off the mega liners think they are in a theme park... They wander over roads, stop in the middle and don’t move if cars toot at them.”

These accounts convey a wish not to exclude visitors but to restore balance, safety and mutual respect through clearer information, better planning and limits on the size and number of ships arriving on any one day.

e. Positive perspectives

Amid widespread concern, some contributors share a more positive view of cruise and coach tourism’s presence and impact. They describe the energy and colour that busy days bring, saying Kirkwall feels lively and welcoming when liners are in port. For many small traders, retailers and makers, cruise and coach tourism provides vital income. Some appreciate temporary street closures that are perceived to make the town safer and more enjoyable for families.

“It annoys me that those slightly inconvenienced by the occasional street closure feel they have the right to control the flow of visitors through the town. It’s the summer visitors who keep many local businesses viable through the winter months.”

“I love the extra buzz around the island, especially in Kirkwall on busier days. There’s an exciting atmosphere as people from all nationalities enjoy our sights, shops and craft fairs. What needs to change is the negativity from those who condemn tourism without good reason.”

Sentiment: Broadly mixed, leaning negative, with a balance between frustration and constructive input. While many comments express concern about crowding, behaviour and the overall management of cruise operations, others focus on practical solutions. The tone reflects tension but also a shared wish for improvement rather than outright opposition to cruise tourism.

Frequency: High. Around 12% of all comments (51 out of 443) are coded directly to the management, scale and impact of cruise and coach tourism. When comments that refer to cruise ships, coaches or associated issues are included, this rises to around half of all responses. This shows how strongly the topic runs through the dataset, shaping how residents discuss tourism even when addressing other areas such as infrastructure, transport or community life.

4. Perceptions of community impact

Across the community stories, there is a strong and consistent perception that the scale and style of tourism are placing pressure on everyday life in Orkney. People describe feeling increasingly overwhelmed and displaced in their own communities – unable to access familiar places, move safely around Kirkwall, or use public services without disruption. Many express frustrations about infrastructure strain and prioritising tourists over locals. The tone is emotional, reflecting fatigue, frustration, and in some cases, grief for what people feel is being lost.

“Orkney does not feel like home over the summer months, the archipelago is not able to absorb all the tourists.”

“There are far too many tourists coming to Orkney, whether by campervan, motorhome, camping, cruise ship or self-catering. Orkney is over infested with tourists from March to October, it is ramping out of control.”

Many say that popular heritage sites and roads now feel “off-limits” in summer. For some, the change represents a deep shift in the rhythm and identity of local life. Others express sadness that their children cannot safely walk, cycle, or enjoy places once part of daily life due to perceived increased tourism traffic on roads.

“As a local, during the busy summer months our heritage on our doorstep is unavailable for us due to high tourist traffic.”

“Sites and places I have visited for years since childhood, over 50 years ago, are now oversubscribed and unavailable to me. An example being the Brough of Birsay — around 70 cars parked at the point and backed up along the access road. I used to welcome the adventurousness of the typical Orkney visitor, but now I find myself resenting the new form of mass tourism Orkney is currently offering. A rebalance is needed.”

Practical consequences are also evident. Respondents describe difficulties securing accommodation for workers, tourism-related pressure on GP surgeries, pharmacies and hospital services, shortages of essential goods during busy periods, and strain on mobile networks. Outer Isles residents, in particular, report challenges finding accommodation during medical appointment travel to or through Mainland, raising concerns about fairness and access for vulnerable groups.

“Tourists come off the liners expecting the local pharmacies to provide them with regular medication that they have run out of or need. They are not prepared to pay for the doctors’ services on board the ship instead swamp our services or the local GP and hospital if we cannot help. All tourists should have to use the facilities on board the ship or a provision should be set up paid for by harbour revenue to provide medical or pharmaceutical care.”

“There seems to be a growing number of patients who come to Scotland and leave their medications at home in order to seek urgent supplies from GP practices as they don't have to pay for it. I have known cruise ship passengers specifically saying that they were waiting to get to Scotland/Orkney because they can be seen on the same day and don't need to pay. There needs to be an acknowledgement that GP practices are working

above capacity and the unseen load of tourists coming and expecting (and receiving) free healthcare.”

“Outer Isles residents’ medical travel is impacted by tourism. During high season, and worst when there are events, patients can often not find any affordable accommodation, sometimes not any accommodation at all, can often not even get a taxi to the airport. When illness becomes a costly ‘pleasure’ then there is something just not right.”

A repeated message is that poor visitor behaviour and lack of respect for local people and property are eroding goodwill. Stories include damage, littering, public urination, and disrespect during weddings and funerals.

“I am f’ing fed up to the back teeth of tourists walking through my garden to see a site. Furthermore, this site sits on private land. They park in my driveway — so God forbid I need an ambulance or a delivery from a lorry.”

“Recently we had a male tourist who entered our business and went down our slip to try and prise off the limpets that have lived on it for many years...It would be wonderful if tourists showed more respect for private property and did not embrace the ethos that Orkney is one large Disneyland-like entertainment theme park.”

There is concern that unmanaged visitor growth – particularly from cruise and campervan tourism – is damaging the character, environment and social fabric of Orkney. Respondents call for limits on visitor numbers, stronger enforcement of responsible behaviour, and clearer leadership from the Council and tourism bodies. Underneath the frustration is a recurring plea for balance, for tourism to continue, but not at the expense of community wellbeing, respect, and access to essential services.

“For years there’s been lots of talk from the Council, Harbours, VisitScotland and Destination Orkney about managing visitors, but I only see more ships and campervans, more tourists swarming our sites and towns, and more stories of folk defecating wherever they want. Less talk, more action.”

Sentiment: Broadly mixed, leaning negative. Many comments express anger and frustration about congestion, crowding and the erosion of everyday convenience. The tone is one of fatigue and realism rather than outright hostility, with residents call for more balanced planning, better distribution of visitor activity and stronger reinvestment in services that sustain community life.

Frequency: Moderate to high. Around 13% of all comments (59 out of 443) relate directly to the impacts of tourism on community life and wellbeing. This makes it one of the most prominent themes, linking closely with concerns about infrastructure and Orkney’s changing sense of place.

5. Infrastructure, visitor services and transport

Community stories describe how core infrastructure is no longer keeping pace with visitor numbers. Roads, paths, toilets, waste facilities, parking, buses and ferry services are all seen as under strain. Many feel that Orkney is welcoming large volumes of visitors without sufficient reinvestment in the basics that make that possible.

a. Toilets and waste facilities

Public toilets are the most frequently mentioned gap. People say there are too few at key sites and that many are in poor condition. The Ring of Brodgar is repeatedly highlighted, with multiple references to visitors relieving themselves in public view – described as *embarrassing, avoidable and unfair* on residents, visitors and the landscape. Tour guides and residents alike express frustration that this has been a known issue “for years” without action.

“The lack of toilets within the World Heritage Site, especially at the Ring of Brodgar, is the biggest issue. I’ve literally watched people toileting beside the car park. It’s 2025. We should be doing better.”

Coach and campervan waste are also recurring concerns. The lack of proper disposal facilities on the islands means coach operators close their onboard toilets and, on busy cruise days, thousands of passengers can be dependent on very few public toilets. In addition, there are limited places for campervans to empty waste outside designated sites, leading to improper dumping. Respondents call for more disposal facilities and clearer signage.

“The council should be building the waste facilities needed for coaches and campervans to empty toilets properly.”

b. Roads and active travel

Many describe roads as deteriorating under heavy use from buses, motorhomes and increased traffic. Verge erosion, potholes and damaged passing places are frequently mentioned, along with frustration about both the level of damage and the lack of repair.

“Our council should be budgeting for the extra traffic and footfall. Roads, grass cutting, general upkeep – it all needs attention.”

At the same time, people express strong support for safe walking and cycling routes between towns and visitor sites. The stretch from Maeshowe to Stenness and the road between Stromness and Kirkwall are repeatedly cited as unsafe for both locals and visitors.

“It’s embarrassing that people have to walk on the grass verge from Maeshowe into Stenness. Why isn’t there a proper pavement?”

c. Public transport

Public transport and bus capacity are also major pressure points. Residents repeatedly report being unable to board scheduled services such as the X1 on busy cruise days because they are already full of cruise passengers. People describe waiting for multiple buses, missing work, nearly missing ferries, and feeling like “second-class citizens” in their own community.

Respondents are clear that this is not about being anti-visitor. The request is for a managed system that does not displace local needs. Suggestions include priority boarding for residents, extra buses on days with large liners, and a dedicated hop-on hop-off visitor shuttle so that tourists are not funnelled onto essential public routes.

“My child couldn’t get to work because large crowds of cruise passengers use scheduled public transport, and when it’s full, locals can’t get on. Nothing is being done to address this.”

“The bus from Stromness to Kirkwall was packed with cruise ship visitors using the X1 as a tour bus. We waited for two hours – several buses – and they just kept coming, full of cruise passengers.”

d. Inter-isles ferry capacity

Respondents describe growing pressure on ferry services during the summer months, when high visitor numbers make it difficult for residents to secure spaces for essential travel. People report being unable to attend medical appointments or visit family because ferries are fully booked, and describe the situation as increasingly unfair and unsustainable.

“We can’t get on ferries to attend dentists or medical appointments as the boat is full. Once I was going for treatment in Aberdeen and had to send the car across the day before because of bookings.”

Isles residents call for expanded ferry services in summer to better balance local needs and visitor demand. Suggestions include integrated transport options that allow tourists to leave their cars on mainland when visiting isles.

“During the summer we welcome tourists, but the ferries cannot keep up with demand from both tourists and locals. We must see increased vehicle capacity as part of the ferry fleet replacement.”

e. Visitor information and facilities

The closure of the Visitor Information Centre is widely seen as a step backwards. Respondents stress that not everyone plans online and that in-person advice remains vital for orientation and directing visitors to less known sites and local makers. Elsewhere, people point to a shortage of bins, picnic seating and parking.

f. Funding and reinvestment

Across the stories runs a consistent message – Orkney needs to fix the basics before pursuing further growth. Toilets, waste management, bus capacity, safe walking routes and routine upkeep are seen as essential public services, not optional extras. Many want visible reinvestment of tourism revenue – especially cruise income – into these facilities. Some support modest user fees for toilets or parking to help fund maintenance.

“Many car parks are free, but there’s considerable erosion of footpaths. Even a small charge, say £1, would help.”

Sentiment: Predominantly negative, reflecting frustration that infrastructure and services have not kept up with visitor growth. However, many comments are solution-oriented, focused on practical investment and management rather than opposition to tourism.

Frequency: High. Around 21% of all comments (94 out of 443) relate directly to infrastructure, transport and visitor services. This makes it one of the most frequent and cross-cutting themes, connecting strongly with issues of community access, tourism management and reinvestment.

6. Campervans not using designated sites

Community stories convey growing concern about the impact of unregulated campervan use on Orkney’s roads, landscapes and shared spaces. Residents describe car parks, beaches and

beauty spots taken over by vehicles staying for days or even weeks, using local resources but not paying for them. Respondents highlight problems with litter and waste linked to overnight parking. Bins designed for light car park use are being treated as if they were campsite facilities, leading to overflow and litter build-up because they are not emptied frequently enough. People also report issues with waste disposal and sewage, including instances of waste being dumped in ditches or drains. Others express frustration at campervans parking sideways to secure scenic views, blocking access for other users of these shared spaces.

“At places like Inganess, RSPB Hobbister and Birsay, they park sideways to get a view but leave no parking for locals, ram rubbish bins, and empty chemical toilets in public toilets or just in the area they’ve parked.”

“They use facilities we fund through our council tax such as toilets, water and car parks, without making any financial contribution. This isn’t wild camping, it’s freeloading on a small community’s assets and infrastructure that others have to pay for.”

There are strong views that this type of use undermines Orkney’s reputation for care and respect for the environment, while creating costs for communities who fund and maintain public toilets, bins and car parks. Many believe tighter regulation is needed, with clear signage, enforcement and ferry checks to ensure campervans have campsite bookings before travelling.

People call for more serviced sites, waste points and designated parking areas, including on the smaller islands, so that those touring Orkney can do so responsibly without encroaching on community spaces.

“I’m a local who owns a campervan. I don’t travel outwith Orkney in it – I bought it to visit the islands by ferry. Unfortunately, there are only two islands with sites and facilities for campervans. It would be wonderful if more of the islands had sites with electric hook-ups and waste facilities.”

Sentiment: Mixed but generally constructive. While some frustration is evident – particularly around waste, parking and infrastructure pressures – many comments focus on practical solutions such as more facilities, clearer regulation and better site management.

Frequency: Low. Around 5% of all comments (22 out of 443) relate directly to campervans and informal overnight stays. Although smaller in scale, this theme generates strong feelings and clear requests for better infrastructure, regulation and fairness in how responsibilities and costs are shared.

7. Perceptions of housing and short-term lets pressures

People express concern that the rapid growth of short-term lets and Airbnb properties is worsening Orkney’s housing crisis. Many describe a pattern of long-term rental homes being converted into holiday accommodation, reducing the availability of housing for local residents and workers. This is seen as a major barrier to sustaining essential services, with employers struggling to recruit staff who cannot find somewhere to live.

“There are far too many short-term lets and Airbnb, and it’s driving out local people who want to live and work here.”

“It’s the beginning of the end for a living island – tourism can’t come at the cost of housing for teachers, carers and working families.”

Respondents call for stronger regulation and caps on the number of STL licences issued each year, as well as limits on how many properties a single person or company can operate. The prevailing feeling is that unchecked growth in holiday lets is damaging the social fabric of communities and undermining Orkney's long-term sustainability.

"I feel the council need to put a cap on how many short-term licences they give out for holiday lets as this is having a negative impact on the housing market. Every week you see new business advertised in houses that used to be rentable homes."

"There should be a limit on how many properties can be approved for letting by the same person or company. The only people benefiting at the moment are those who can afford to buy multiple properties."

Several people highlight the impact on housing prices and year-round occupancy, noting that many homes in Kirkwall and Stromness stand empty through the winter. This is seen as eroding community cohesion and accelerating depopulation in some areas.

"My family has been affected by the knock-on rise in housing prices too. They had a shared equity home, but the price to buy it has increased so much that they might never be able to afford it."

On the isles, where housing challenges are already more acute, even a small increase in short-term lets can be perceived as having a significant impact. (The same applies to second homes, although these are out of scope as they are not tourist accommodation.)

Sentiment: Predominantly negative, reflecting frustration and alarm about the loss of local housing to tourism-related use.

Frequency: Low. Around 4% of all comments (17 out of 443) relate directly to housing and short-term lets. While relatively small in number, this theme carries strong social significance, linking tourism management with wider issues of affordability, workforce stability and community resilience.

8. Environmental concerns

People express growing anxiety about the environmental impact of tourism – both on land and at sea. Many describe visible wear and tear at heritage and natural sites, citing soil erosion, littering, and congestion from cars and coaches. Some respondents fear that without stronger intervention, the cumulative effects at some sites will become irreversible.

"While tourism can be good for the economy there is a high price to pay in the environmental impact masses of tourists visiting the sites. A better balance needs to be sought."

"There are far too many tourists coming to Orkney year after year, and this needs to be managed better. The environmental damage being done may never be repairable. Footfall at the most popular sites is causing serious harm, and it will only get worse."

Cruise tourism is seen as particularly problematic for Orkney's environment. Several contributors describe emissions from ships as a major local air-quality issue and a wider climate concern, calling for stricter regulation and the installation of shore power facilities. Some go further, arguing that cruise ships are fundamentally incompatible with Orkney's net-zero ambitions and should be phased out in favour of lower-impact travel.

“Inhaling the stink of cruise ship fumes when they are running their engines in harbour – it’s the equivalent of hundreds of buses idling at once.”

Contributors also emphasise the need for stronger marine planning to ensure that the growth of sea-based activities, including cruise operations, does not harm wildlife, biodiversity or community wellbeing. They call for better monitoring and waste management, along with investment in staff or volunteers to safeguard remote sites from litter, disturbance and damage to wildlife habitats.

“There needs to be active management of remote sites – people are leaving litter and waste in fragile landscapes that can’t cope with the volume.”

“Disembarking around 50 people at one location, such as Marwick Head, at the same time is disrespectful to the wildlife. There’s little or no guidance from tour guides on responsible wildlife watching.”

Sentiment: Predominantly negative. Comments express frustration and alarm about visible environmental degradation and pollution.

Frequency: Low. Around 3% of all comments (14 out of 443) relate directly to environmental impacts and protection. Though limited in number, they convey a clear message about stewardship and sustainability.

9. Perceptions of community engagement and benefit

Across the community responses there is a strong desire for greater local control, genuine dialogue and a fairer share of tourism’s benefits.

People express frustration that decisions about tourism – particularly cruise and visitor volumes – are being made for communities rather than with them. Many feel their voices are not heard in council processes and that consultation exercises rarely lead to meaningful change. Several describe long-standing “consultation fatigue,” saying surveys and meetings often feel like “tick-box exercises” designed to appease complaints rather than shape action. Some go further, arguing that the Council has failed to listen to residents and the tourism industry over many years. The prevailing tone is one of frustration mixed with hope – people want tourism to succeed, but to be shaped by local priorities and values, and supported by genuine community involvement.

“Tourism can be a force for good if it’s done in the right way. We need to take ownership of it and value Orkney more highly.”

“I feel that people living in Kirkwall and other affected areas of Orkney should have been given the chance, years ago, to decide how many large cruise ships they wanted visiting their hometowns, rather than having them forced upon us. I don’t recall any meetings where locals were asked how they felt about this.”

Many people frame community-led tourism as a practical pathway to balance – a way to sustain the economy while protecting Orkney’s culture, environment and quality of life. Suggestions include directing visitors towards community-based projects, sharing tourism revenue more equitably, and ensuring local families can still afford to enjoy heritage sites through free or discounted resident access. Others cite international examples, such as the Faroe Islands, where managed visitor programmes and community ownership are seen as positive models.

“It’s about getting the balance right between what locals need and what tourism brings to Orkney. We need to look at how to build on the positive impacts of tourism while meeting the needs of residents so both can coexist. Tourism has to be part of Orkney’s future if our islands are to continue to thrive – but we need to get it right so that tourism supports local life, and local life supports tourism.”

Underlying many comments is a call for respect – both for local residents and for the principle that tourism should enhance, not dominate, island life. People want open public dialogue about what kind of tourism Orkney values, what scale is sustainable, and how benefits can be shared more widely across communities

“There needs to be a discussion about responsible tourism.”

“It would be good if we could have a balanced public conversation about cruise. There’s very little discussion at the moment, and what does exist isn’t balanced.”

Sentiment: Largely neutral to positive, with a strong emphasis on fairness, participation and shared benefit. While frustration is voiced about perceived exclusion or lack of consultation, most comments are forward-looking and focused on collaboration, transparency and balance.

Frequency: Low. Around 5% of all comments (24 out of 443) relate directly to community engagement and benefit. Though not among the most frequent themes, it reflects an important strand of public opinion – highlighting the desire for residents to have a stronger voice in shaping how tourism develops and contributes locally.

10. Leadership, governance and future strategy

a. Funding models and visitor levies

Community stories show growing interest in new ways to fund tourism infrastructure, with some contributors supporting a tourist or visitor levy to help maintain Orkney’s roads, toilets, waste facilities and public services. People suggest that visitors, particularly cruise passengers, should contribute more directly to the upkeep of the places they use. Several propose a small, flat fee per-person charge or levy at the point of entry, with funds ring-fenced for improvements that benefit both residents and visitors.

“Cruise liner companies need to contribute more financially – they use our roads and facilities but give too little back.”

“I support a tourist tax at the point of entry – it would go a long way towards improving amenities for visitors and locals alike.”

Others recommend that a proportion of cruise or visitor tax revenue be reinvested directly in community projects such as playparks, heritage maintenance or environmental initiatives. This is seen as a way to strengthen the link between tourism income and local benefit, helping build wider support for the industry.

“All revenue from cruise liners should be shared with the community – even a percentage for playparks and local amenities would make a difference.”

b. OIC’s role

Community stories show deep frustration and mistrust toward the Orkney Islands Council (OIC). Many feel the Council has promoted cruises tourism, without properly managing the

impact on infrastructure or community life. Several accuse OIC and its Harbour Authority of opacity and of prioritising revenue over responsibility, leaving communities to deal with the visible strain on services.

“OIC, through its Harbour operations, has aggressively marketed Orkney as a cruise ship destination. It now needs to take responsibility for what it has created and invest in the infrastructure that’s needed.”

“What matters most to me is that the Council recognises that by opening Orkney to mass tourism, it must take responsibility and provide better services. This would help local communities and businesses avoid becoming overwhelmed by the lack of infrastructure that should be funded through harbour fees.”

Many argue that more of the revenue from cruise activity should be reinvested locally – improving toilets, roads, public spaces and community facilities. Residents want to know where tourism money goes. They question how harbour dues and cruise income are spent and also call for transparent data on both the benefits and costs of tourism.

“Proper data of the financial costs and benefits would be... helpful...release of proper financial and environmental costs and benefits of tourism”

The way in which OIC implemented the short-term let licensing scheme is widely criticised for adding costs and red tape, making local self-catering businesses unviable and allowing larger operators to dominate.

“It’s becoming impossible to run a self-catering cottage here – the short-term let bureaucracy and rising costs are driving people out.”

c. Future strategy

Community stories show clear divisions in how people think Orkney’s tourism should develop. For some, the islands are not busy enough; for others, they are already at breaking point.

Many contributors working in tourism describe the sector as vital to Orkney’s year-round economy and worry that it is being taken for granted. They call for greater investment, stronger marketing and fewer bureaucratic barriers and growth, arguing that tourism supports local jobs, businesses and cultural life.

“We are not busy enough and we should be driving more visitors to Orkney... We really need to win more work, other areas in Scotland are now outstripping Orkney in this competitive market. If we have 450,000 visitors per year, why don’t we try to increase that to 1 million by 2027.”

“More investment in infrastructure – you’ve got to spend money to make money. If tourist numbers keep declining like they have in 2025, then the archipelago will be ruined.”

Others take the opposite view, warning that unchecked growth is damaging both experience and environment. They describe crowded sites, overwhelmed infrastructure and a loss of the calm and authenticity that visitors come to enjoy. Calls for restraint include limits on cruise ship numbers, protection of heritage sites, and a stronger focus on higher-value, lower-impact tourism.

“Tourism is a good thing, but more and more tourism is eroding the sense of place which makes Orkney so special.”

“Volume tourism is the biggest irritant. Repeat visitors who stay longer and spend more should be prioritised over mass cruise tourism.”

Some believe Orkney should be known as a high-quality destination that leaves visitors feeling connected, not processed. There is support for encouraging visitors who stay longer, spend locally and engage with island culture – and for reducing dependency on high-volume cruise traffic.

“Orkney needs to be a high-quality destination where people feel part of a caring community. Visitors love authentic experiences where they feel included.”

“Encourage quality tourism, more high-end cruise lines and fewer of the ‘Disney type’ ships.”

Across these contrasting perspectives runs a shared frustration about the absence of a clear, joined-up plan. Businesses say it is hard to invest without confidence in long-term visitor forecasts. Residents want to understand how tourism fits within broader economic and community priorities. Both groups call for a strategy that measures success not just in numbers, but in how tourism supports the community.

“It’s hard for tourism-related businesses to invest, or not, without a clear strategy on anticipated visitor numbers.”

“Let’s monitor the health, wellbeing and attitudes of community members, not just count the number of tourists.”

Around a quarter of respondents call for growth and stronger investment in tourism, particularly among those working directly in the sector. About half express a clear wish to further limit visitor numbers – especially large cruise volumes – to protect Orkney’s environment, infrastructure and quality of life. The remaining quarter emphasise the need for balance, better management and higher-value, lower-impact tourism.

Sentiment: Broadly mixed, leaning towards constructive rather than hostile. Many comments express frustration with transparency, leadership and follow-through, while others strike a more neutral tone – calling for clearer data, shared planning and genuine collaboration. The overall sentiment reflects a desire for stronger governance and accountability, but also optimism that improvement is possible.

Frequency: High. Around 20% of all comments (87 out of 443) relate directly to leadership, governance and future strategy.

7. Stakeholder Conversations: detailed theming

7.i. Method

Fourteen stakeholder interviews and group discussions were carried out from mid-September to early November 2025, involving representatives from Community Councils, Development Trusts, VisitScotland, Orkney Islands Council, Kirkwall BID, Stromness Development Trust, cruise stakeholders, Destination Orkney, Highlands and Islands Enterprise, Historic Environment Scotland, Orkney Tourist Guides Association (OTGA) and NatureScot. In total, these sessions included 46 individuals.

From these discussions, 423 distinct statements containing perspectives were identified. An initial manual sort and theme clustering exercise was undertaken to group related ideas and preserve contextual meaning, followed by AI-assisted thematic analysis. In this process, a distinction was made between *themes* and *individual perspectives*. A theme is defined as an issue or perception raised by three or more stakeholders across different sessions, indicating a shared or recurring concern. Perspectives mentioned by fewer than three stakeholders are included within the narrative overview – mainly as illustrative quotes – where they add useful context or demonstrate the diversity of views but are not categorised as full themes.

Sentiment, frequency and reach analysis was then applied to assess the relative weight, tone and breadth of each theme within the overall dataset.

Sentiment analysis captured the overall tone of commentary associated with each theme, categorised as *positive*, *neutral* or *negative*. It reflects how people *feel* about an issue – for example, enthusiasm, concern, frustration or cautious optimism – rather than whether the issue itself is inherently good or bad.

Frequency indicates how often a particular issue or perception was raised across the 423 coded comments. It reflects prominence rather than importance. Themes were categorised as:

- Low frequency (<6%) – raised by fewer participants or in specific contexts.
- Moderate frequency (6-10%) – recurring but not dominant issues.
- Moderate to high frequency (11-15%) – strong and sustained attention across interview.
- High frequency (16-20%) – major, cross-cutting areas of discussion.

This provides a relative measure of how strongly each topic featured within the overall conversation.

Stakeholder reach identifies how widely a theme was raised across the 14 interview and group sessions. This measure helps to distinguish between issues that are broadly shared and those that are more localised or stakeholder specific. Reach was categorised as *universal* (raised in 11-14 sessions), *broad* (7-10), *moderate* (4-6), *focused* (2–3) or *limited* (1).

Together, these three measures – sentiment, frequency and stakeholder reach – offer a balanced picture of both the depth and breadth of stakeholder perceptions, highlighting where issues are most intensely felt and where they are most widely shared across Orkney’s tourism system.

7.ii. Summary insights

Tourism remains central to Orkney's economy and identity, supporting local businesses, creative producers and year-round employment. Yet across all stakeholder groups there is a clear view that the balance has tipped – with visitor growth now placing strain on infrastructure, housing and community life.

Participants emphasise the need for a better balance between economic benefit, environmental protection and community wellbeing. Cruise and coach tourism are widely acknowledged as essential but operating at a scale that feels unsustainable. The call is for stronger leadership, clearer strategy and coordinated destination management that reflect the needs of both residents and visitors.

The overall message is one of renewal, not resistance. People want Orkney to remain a welcoming and vibrant destination, but through a model that is balanced, well-managed and fair – one that reinvests in the places and communities on which tourism's success ultimately depends.

7.iii. Detailed insights

1. Perceptions of campervans and wild camping

People describe growing numbers of campervans staying overnight in community car parks and informal sites such as Birsay, where up to ten vehicles may park each night in summer. As campervans have become larger, they are perceived to take up multiple spaces to avoid blocking access, which in turn reduces parking for residents. Some people describe feeling uneasy when local spaces become dominated by clusters of campervans.

There is a shared perception that rubbish, and waste are not being managed effectively. Bin collections at campervan hotspots are designed for occasional use rather than several families camping each night, leading to overflowing bins and litter.

On the isles, wild camping is viewed as disruptive for farmers and the wider community, sometimes damaging fragile dune systems or bird habitats and putting additional pressure on already limited toilet and parking facilities.

“As a local, you can feel intimidated having to walk through a camp of multiple campervans – it becomes their space, not the community's space.”

“Campervans change the feel of key sites and beauty spots, and the waste they generate is not well managed. Bin cleaning schedules are those of a car park, not an overnight facility.”

Sentiment: mainly negative (around 75% negative, 22% neutral, 3% positive). The tone reflects frustration about unmanaged camping, litter and environmental harm, alongside limited optimism about local solutions.

Frequency: moderate (6% of comments based on 24 out of 423 comments).

Stakeholder reach: broad (raised in 9 of 14 sessions), indicating that concern about campervan management spans community, public sector and industry stakeholders.

2. Perceptions of community frustration and division

People describe a growing sense of frustration about how tourism is managed and how its impacts are shared across communities. There is a perception that tourism now divides people – between those who benefit and those who do not, those who welcome visitors and those who feel burdened by them.

Many feel that tourism is something “done to” the community rather than shaped with it. Residents say they have little influence over visitor numbers or how cruise tourism is managed, leaving them feeling overtaken during the summer months. The frustration expressed is not directed at visitors themselves but at the systems, planning and decisions that sit around tourism.

People describe weariness and frustration the same problems – such as cruise cyclist, lack of toilets, congestion and the X1 bus challenges – recur each year without being resolved. Some express concern that, if not addressed, this frustration could begin to erode Orkney’s long-standing reputation for warmth and welcome.

“People don’t hate the tourists – they hate how tourism is being managed. If we’re going to have the numbers we have now, we need far better infrastructure and coordination.”

“Shops and cafés have upped prices because they have a tourism market – and now it’s inaccessible for local as there is so much fuel poverty in Orkney that people feel economically excluded, they see cruise passengers some of whom have paid £7000 for a cruise and feel jealous and resentful and this is what is driving the anti-cruise feeling. The resentment of tourist is caused by the underlying cost of living crisis and resulting financial exclusion not because of actual issues with tourism.”

Sentiment: mainly negative (around 75% negative, 25% neutral). The tone reflects frustration and fatigue rather than hostility, with criticism directed at management and systems rather than visitors.

Frequency: low (around 2-3% of total comments, based on 11 out of 423).

Stakeholder reach: moderate (raised in 5 of 14 sessions), suggesting that while not universal, this sentiment is shared across several parts of the stakeholder network.

3. Perceptions of community-led tourism and local choice

People emphasise that tourism should reflect the needs and priorities of each place rather than follow a one-size-fits-all model. There is strong support for using Place Plans and community-led approaches to guide decisions, ensuring that development works for each area and that benefits are more widely shared.

Examples – such as the community-led cruise models in Papay, North Ronaldsay and Stronsay, the Papay hostel which helps to subsidise the island shop, Stronsay’s Fishmart Café (an OIC-owned building run by the community) HMS Tern and Tomb of the Eagles – are seen as positive illustrations of how local involvement can make tourism more sustainable. Similar ideas are emerging elsewhere, such as community halls opening as toilet stops, with costs covered by cruise companies.

Views from the isles underline that different islands have different aspirations. Some see opportunities to grow tourism, while others prefer to keep it limited, seeing few direct benefits

and added pressure on scarce resources like transport and accommodation. Across all areas there is a call for greater community control and for tourism to happen *with* communities rather than *to* them.

“Tourism does benefit the community, but we need more community-led tourism, so the benefits are more widely spread.”

“Tourism money isn’t seen as coming into the community – it’s seen as going to a few individual households but impacting everyone.”

Sentiment: mixed but leaning positive (around 55% positive, 30% neutral, 15% negative). The tone is constructive and solution-oriented, focusing on empowerment and local benefit rather than criticism.

Frequency: low (around 4% of total comments, based on 17 out of 423).

Stakeholder reach: moderate (raised in 5 of 14 sessions), suggesting that while not universal, the desire for community-led approaches and local control is shared across multiple stakeholder groups.

While overall frequency is low and stakeholder reach moderate, the importance of community-led tourism and local choice featured in every session involving the isles stakeholders, indicating that it remains a key priority for those communities.

4. Perceptions of housing pressure and short-term lets

People describe a growing tension between meeting local housing needs and supporting tourism and visiting workers. There is a sense that the balance has tipped, with too many homes now used as short-term lets (STLs) or second homes, making it harder for local people and key workers to find somewhere to live.

While there is recognition that new builds (including pods and cabins) and the renovation of empty properties can add useful capacity, there is concern about existing residential homes being lost from the market. Changes to tenancy rules and higher rental standards are also seen as reducing housing availability, particularly in Stromness where conservation restrictions prevent upgrades to older properties.

On the isles, the combined effect of STLs, second homes and limited ferry capacity is viewed as putting pressure on both residents and local businesses, which struggle to house essential workers.

Respondents stressed that Stromness and Kirkwall must remain functional towns with enough permanent housing to support thriving, year-round communities.

“There is a delicate balance between having the right level of accommodation to support visiting workers and a small number of tourists, and between losing local housing to STLs.”

“It’s not an either/or – we need enough housing for the community and enough for visitors.”

Sentiment: mainly negative (around 66% negative, 30% neutral, 4% positive). The tone reflects concern about losing housing stock and the knock-on effect on local life and employment, while recognising that well-planned development can help.

Frequency: low (around 2-3% of total comments, based on 10 out of 423).

Stakeholder reach: moderate (raised in 5 of 14 sessions), showing that housing pressures are a recurring concern but not universal across all groups.

5. Perceptions of inter-island ferry capacity

People express strong concern about pressure on the inter-island ferry network during the summer months, when the combination of local travel, freight and tourism demand often exceeds capacity. Many describe being unable to book space for cars, even for essential day-to-day journeys, and say this is affecting both personal mobility and community life.

Islanders highlight that the current system can feel unfair, with visitors' vehicles taking up limited deck space while residents struggle to travel or move goods. The issue is often described as one of balance – most communities welcome visitors but not at the expense of islanders' ability to live and work normally.

There is also frustration with the ferry booking system, which is viewed as difficult to navigate and sometimes inaccurate in showing available space. Parking capacity at Tingwall is another practical problem, adding to the strain.

Many comments point to the need for more joined-up and sustainable transport options. Suggestions include encouraging visitors to leave cars on the mainland, expanding e-bike and e-bus schemes, and developing more coordinated local tour and transport options within the isles.

“We need to find smarter ways to get visitors to leave their cars on the mainland and use local transport, tour options and food places.”

“Ferry capacity is a huge issue – islands don't want tourist cars and motorhomes taking up ferry deck space if that fundamentally impacts islanders' ability to travel or move freight. In summer, the 'double whammy' of tourism and infrastructure work makes it even harder.”

Sentiment: mainly negative (around 70% negative, 25% neutral, 5% positive). The tone reflects practical frustration and a desire for more balanced management rather than opposition to tourism.

Frequency: low (around 3% of total comments, based on 14 out of 423).

Stakeholder reach: moderate (raised in 5 of 14 sessions).

While overall frequency is low and stakeholder reach moderate, the importance of inter isles ferry capacity featured in every session involving the isles stakeholders, indicating that it remains a key priority for those communities

6. Perceptions of Orkney Islands Council's role, leadership and transparency around tourism

Many people express frustration at what they see as a lack of transparency, leadership and joined-up thinking within Orkney Islands Council (OIC) and its subsidiary, Orkney Harbours. Concerns centre on how cruise income is used, the perceived absence of visible reinvestment in local infrastructure, and the sense that decisions are being made *for* communities rather than

with them. People perceive OIC, through Orkney Harbours, as being fundamentally involved in tourism in Orkney and want it to show stronger leadership on the issue.

There is a widely shared perception that OIC's financial pressures and Harbours' income-generation priorities have taken precedence over long-term community, environmental and heritage considerations. People repeatedly call for greater openness about how cruise-related revenue is allocated and for a clearer link between income and community benefit through investment in tourism infrastructure and facilities.

Some feel that criticism of the cruise model is being suppressed, with reports and meeting minutes described as omitting or softening contentious discussions. Others suggest that fear of reputational risk or "bad optics" is paralysing decision-making.

Comments also highlight inconsistencies between Harbours' focus on expanding cruise operations and OIC's wider commitments on tourism strategy, sustainability, biodiversity and climate.

There is concern that regulation – particularly around short-term lets – has been applied in a way that has unintentionally reduced local income streams and accommodation options on the isles. There is also a call for the council to empower local groups and address planning barriers – for example, by supporting small-scale community campervan facilities that allow communities to benefit directly from visitor income.

"It's not just about income to the Council – OIC needs to take into account the broader value and impact on the whole community."

"There are competing agendas between income generation for Harbours – and by default, OIC – and what is right for the long-term interests of the landscape, heritage and community. The power sits with Harbours and OIC, not with the community."

Sentiment: strongly negative (around 80% negative, 15% neutral, 5% positive). The tone reflects frustration about perceived absence of leadership, limited transparency and lack of alignment between strategy and action.

Frequency: moderate (around 10% of total comments, based on 42 out of 423).

Stakeholder reach: broad (raised in 10 of 14 sessions), indicating that perceptions of OIC's role and leadership were widely shared across sectors and communities.

7. Perceptions of future tourism funding and investment

Overall, there is a shared belief that Orkney needs a clear and coherent tourism funding model – one that fairly captures value from visitors, reinvests in the infrastructure it depends on, and maintains accessibility for both residents and tourists.

People express strong views on how future tourism income, whether from a visitor levy, cruise charges or other sources, should be managed. There is a consistent call for transparency and for a visible link between what visitors contribute and the benefits delivered to communities and local infrastructure. Many stress that if a levy is introduced, its revenue must not disappear into the council's general funds but be ring-fenced for tangible reinvestment.

Comments also underline the need to balance tourism funding ambitions with affordability and inclusivity. Respondents caution against levies that might deter ordinary visitors or undermine Orkney's reputation as a welcoming, accessible destination.

"If a levy goes ahead, that money can't just disappear into the council pot – there needs to be a clear link between the levy charged and the benefits delivered."

"There is a complete lack of tourism investment. OIC is too scared of the optics and hasn't realised there are investments that would benefit both visitors and residents."

Sentiment: mixed but leaning negative (around 60% negative, 30% neutral, 10% positive). The tone reflects concern about underinvestment and a desire for transparency and reinvestment rather than opposition to funding reform.

Frequency: low (around 3% of total comments, based on 12 out of 423).

Stakeholder reach: moderate (raised in 6 of 14 sessions), indicating broad but not universal engagement across sectors on the question of future funding and investment.

8. Perceptions of cruise and coach tourism in Orkney

Many people perceive cruise and coach tourism as an important part of Orkney's economy. They see it as sustaining high street businesses, cafés and visitor attractions, and supporting local makers, artists, food producers and service providers. Many believe that without this visitor trade, Kirkwall and Stromness would be quieter, with fewer year-round jobs and reduced outlets for local producers. While there are differing views on the right scale of cruise and coach tourism, this economic contribution is widely perceived as essential to Orkney's vibrancy and livelihood.

"Cruise liners are essential for the economies of Stromness and Kirkwall."

"There is a wilful refusal to recognise the benefits cruise brings – the high street in Kirkwall would not be as vibrant without the tourism spend."

A strong theme is the perception that cruise and coach visitor numbers have grown beyond what Orkney's infrastructure and communities can comfortably manage. People describe the current balance between cruise, coach and independent travel as unsustainable. Many express concern that the existing "high-volume, low-value" model risks long-term economic, environmental and reputational damage to Orkney's tourism offering.

"We've completely lost touch with the right balance between volume tourism and value tourism. We have high numbers of people at bottleneck sites – our country's treasured assets – and they're being damaged without there being sufficient upside for the community to make this damage tolerable."

Respondents perceive the management of cruise and coach visits as poorly coordinated and overly compressed, with visitors under pressure to "see everything in one day." They describe a lack of alignment between ships, tour operators and local businesses, leading to crowding, short or poorly timed stopovers and limited community benefit. Individual sites and staff are viewed positively for their commitment and initiative, but there is a strong sense that coordination at a system level is missing.

“Cruise passengers being dropped for such a short time (45 minutes) that they really can’t explore Stromness or add economic value. We want more ships docking in Stromness, not people coached through for a 45-minute mini visit.”

“Skara Brae is like a hell hole some days – it’s simply not built to accommodate the numbers of visitors now going through it.”

“Cruise is managed extremely well – the team works together effectively, and any issues are picked up and resolved at the end-of-season wash-up meeting. We have a great cruise offering because Orkney is so compact. Harbours do an excellent job.”

Many people perceive that Orkney’s infrastructure is struggling to cope with the current level of cruise and coach tourism. They point to overflowing bins, congested roads, suboptimal traffic flow and overwhelmed public transport. Practical suggestions include better toilet and waste facilities for coaches, more frequent bin emptying, improved parking management and investment in smaller or electric vehicles to reduce road wear and emissions.

“On a big liner day the X1 bus is used as a sightseeing bus. Local people can’t get on, and even if they can, the bus is delayed as the driver deals with tourist questions.”

“We’ve got too many tourists for current infrastructure – particularly in West Mainland.”

There is a widespread perception that heavy visitor traffic is damaging Orkney’s natural and historic sites. People describe erosion, path degradation and overcrowding at key heritage locations such as Ring of Brodgar, Skara Brae and Yesnaby. As these “honeypot” sites fill up, visitors are seen to disperse to smaller, less-prepared areas, causing new pressures and occasional antisocial behaviour such as parking on private land or “wild toileting.”

“Individual sites are doing the best they can to deal with volume – because they have committed staff with initiative – but it’s not part of a considered and coordinated plan.”

“When we talk about dispersal, we need to be careful that we’re not really just pushing volume into smaller, less well-managed sites that have even fewer facilities to handle it.”

Residents report feeling that cruise and coach days can overwhelm local spaces, particularly in Kirkwall, where congestion, road closures and large groups make it harder for pedestrians and disabled people to move around. Perennial issues such as the impact of cruise cycle groups on local traffic and the overcrowding of the X1 bus are not resolved, leading to frustration that community needs are secondary to tourist needs.

“Closed streets make life harder for disabled people – it doesn’t feel like there’s a proper plan for dispersing people.”

“Sort out the bike issue. There are still cruise groups of 16-18 uniformed cyclists who aren’t used to our road conditions – or create a cycle path.”

Some perceive the current system as economically extractive, with too much value captured by tour and cruise operators and too little reaching local communities. Others are concerned that an over focus on cruise and coach tourism distorts Orkney’s broader tourism economy – diminishing its reputation for quality and reducing opportunities for higher-spending independent travellers.

“The current model is extractive – with cruise companies needing to find low-cost itineraries for all-inclusive cruise tours.”

Sentiment: Overall sentiment is predominantly negative (around 65-70%), with 20% neutral and 10-15% positive. Positivity is strongest among those directly involved in or benefiting from cruise and coach activity. The tone reflects frustration with scale and management rather than opposition in principle. Stakeholders acknowledge the significant economic value these visitors bring, particularly to Kirkwall and Stromness, but believe that volumes have exceeded Orkney’s infrastructure and community capacity. The prevailing mood is one of concern and conditional support – a wish for cruise and coach tourism to continue, but at a level and in a form that safeguards Orkney’s heritage, environment and quality of life.

Frequency: high. Cruise and coach tourism was the single largest theme in the dataset, with around 223 of 423 total comments (53%) referring to it in some way. Because of the scale and overlap with other topics such as infrastructure, governance and the council’s role, 130 comments have been analysed in this dedicated section, with the remaining references integrated into related themes.

Stakeholder reach: universal (raised in all 14 sessions).

9. Perceptions of infrastructure

People express concern about the closure of the Visitor Information Centre (VIC), describing it as a retrograde step that weakens Orkney’s ability to manage and disperse visitors effectively. The loss of a central information point is seen as creating confusion for visitors and adding pressure on shop and library staff, who were expected to fill the gap when the Stromness VIC closed – and is assumed will do the same in Kirkwall. Respondents also emphasise the need for clearer signage, particularly in Stromness, and for interpretation that reflects Orkney’s increasingly international audience through digital and multilingual tools.

“Closing the TIC [Tourist Information Centre] is a massive retrograde step – it removes our ability to manage cruise tourists or direct visitors to smaller, lesser-known community tourism ventures.”

There is widespread frustration about the lack of well-maintained footpaths and safe active travel routes. People call for a connected network of walking and cycling paths, including a dedicated Kirkwall–Stromness cycle route, which many describe as a “game changer” for both residents and visitors. Overgrown verges and unsafe conditions where verge cutting has stopped are also mentioned.

“Need a Kirkwall to Stromness cycle path – it would be a game changer for the local community as well as tourists.”

Many comments express concern about road quality and the growing impact of large coaches, campervans and minibuses on Orkney’s roads. People describe eroded verges, collapsing road edges, and vehicles using narrow residential routes in particular in West Mainland. There is a shared perception that the current infrastructure is no longer suited to the volume or scale of modern tourist traffic.

“The size and width of modern coaches are not suited to our road network – they’re damaging verges and using single-track roads through residential areas around Skara Brae.”

The lack of public toilets and waste disposal points is one of the most frequently mentioned issues. Facilities are seen as too few, poorly maintained or entirely absent in key areas. Coaches are criticised for locking toilets because there are no waste disposal facilities, leading to “wild toileting” by necessity. Views are divided over the proposal for toilets at the Ring of Brodgar – some see them as essential for visitor management, while others believe they would desecrate a sacred site and increase pressure on the fragile landscape.

“Toilets on coaches aren’t available because there’s nowhere to dispose of waste – we desperately need a facility to empty coach toilets.”

“The Ring of Brodgar is first and foremost a sacred site – tourist needs shouldn’t be put ahead of preserving the site.”

“Toilets at Ring of Brodgar – just can’t understand why it hasn’t been done!”

A recurring concern is the shortage of staff across tourism and hospitality, which respondents link directly to the lack of affordable housing. Many describe a “vicious circle” where businesses cannot find or accommodate workers, forcing some sites to close or limit opening hours.

Finally, people perceive Orkney Islands Council as under-resourced and slow to respond to infrastructure needs. Examples include unmaintained core paths, inadequate investment in roads and bin collections that don’t reflect peak visitor use. Respondents express frustration at what they see as unnecessary bureaucracy and a lack of investment in basic amenities. Without more proactive management, many believe Orkney risks undermining both community wellbeing and visitor experience.

“There is a single toilet at the cathedral that all visitors and all staff have to use – it’s just not enough.”

Sentiment: predominantly negative (around 76% negative, 20% neutral, 4% positive), with frustration directed at infrastructure gaps rather than tourism itself.

Frequency: Moderate to high (around 13-14% of total comments, 58 out of 423), making it one of the most discussed themes.

Stakeholder reach: Broad (raised in 11 of 14 sessions), indicating near-universal concern across stakeholders

10. Perceptions of strategy, leadership and governance

People consistently describe a lack of clear leadership, accountability and coordination in how tourism is managed. They perceive that no single organisation has the authority, resources or mandate to make decisions, and that commitments are often not followed through with action. There is widespread frustration at the absence of a genuinely empowered destination management function, with existing partnership structures viewed as fragmented, risk-averse and ineffective – resulting in repeated conversations without tangible progress.

“There is no clear tourism strategy or action plan. We may have a document, but partners aren’t acting on it, and no real steps have been taken to deliver it.”

“We need to look at what we can do for 2026 – can’t push everything out.”

Respondents call for a clear, evidence-based tourism strategy that is actively implemented rather than existing “as a piece of paper.” Many believe Orkney has outgrown its current arrangements and now needs a single, island-wide body – a true Destination Management Organisation (DMO), distinct from membership-based groups – to coordinate effort across the public, private and community sectors and lead sustainable, joined-up action.

People believe Orkney’s tourism model is currently out of balance – too focused on volume rather than value. Cruise and campervan tourism are seen as increasingly dominant, while independent and longer-stay visitors are viewed as higher-value but increasingly marginalised. There is strong support for defining what a sustainable scale and mix of tourism should look like – one that aligns economic benefit with environmental protection and community wellbeing.

“Getting the balance right must be driven by what the community wants, what protects our heritage and environment, and by a sustainable tourism model – not simply by unchecked commercial demand.”

Several comments frame the issue as structural – arguing that tourism is being managed as disconnected parts rather than as a single, interdependent system. Respondents want joined-up thinking that recognises links between housing, transport, environment and community capacity. Many use the language of regenerative or triple-bottom-line tourism, calling for an approach where economic benefit, environmental health and community wellbeing are held in balance.

“Sustainability can’t just mean endless growth; it has to focus on quality and impact – economic, environmental and social – or we risk a race to the bottom that damages the very fabric of our community.”

A recurring message is that communities feel excluded from decisions that directly affect them. Respondents call for an honest, well-facilitated conversation about what kind of tourism Orkney wants and the trade-offs that may be required. People describe feeling that “tourism is happening to us, not with us,” and want greater transparency, better data and genuine two-way dialogue between communities, policymakers and operators.

“The community needs a stronger voice in shaping tourism – and there must be honesty about the trade-offs that come with different choices.”

People express pride in Orkney’s distinctive identity – its heritage, creativity and warmth of welcome – but fear these strengths are being eroded by high visitor volumes and increasingly homogenised experiences. They highlight the need to protect authenticity, maintain high standards and focus on “quality not quantity.” Many warn that once Orkney’s reputation for distinctive, meaningful experiences is lost, it will be difficult to recover.

“We need the right mix of visitors in the right volumes to balance community needs, environmental protection, heritage preservation and economic gain. It’s out of balance at the moment.”

Finally, there is widespread frustration at the absence of reliable data on visitor numbers, behaviour and impacts. People argue that better evidence is essential for sound decision-making – from defining capacity limits and managing dispersal to setting sustainable cruise and coach volumes. The overarching tone is one of urgency: people are weary of discussion and want to see concrete, coordinated action that protects Orkney’s long-term social, environmental and economic wellbeing.

“There’s no real system for monitoring tourism numbers or planning for them. We know more about the movements of crabs around Orkney’s coast than we do about how many tourists come here, where they go, or what impact they have.”

Sentiment: predominantly negative (around 70% negative, 20% neutral, 10% positive). Stakeholders express deep frustration at the absence of strategic leadership, direction and coordination. The tone is one of fatigue and concern rather than hostility – people know what needs to be done, but feel no one is empowered or resourced to act.

Frequency: high (around 32% of total comments, based on 130 out of 423), indicating that issues of strategy and leadership underpin almost every other theme.

Stakeholder reach: universal (raised in all 14 sessions), reflecting widespread agreement across public, private, community and sector stakeholders that Orkney’s tourism system needs clearer leadership, accountability and direction.

8. Community workshop output: themed actions

8.i. Method

Four workshops were carried out in November 2025. One of these comprised a selected community tourism panel (8 participants) and three open workshops, advertised to the community (34 participants, plus 6 OIC observers across the three sessions). Many of the participants – although not all – have an active professional role in tourism in Orkney, with a strong representation from the tour guiding community.

The workshops shared an overview of the perception data gathered from the Community Stories platform and the Stakeholder Conversations. From this data participants shared their response to these perceptions (including what resonated or not, what surprised and what was felt to be missing) and from this the groups worked to create a prioritised list of actions that they felt OIC should include in the Visitor Management Plan (VMP). This prioritisation scoped both the importance of the suggestion and the ease of its implementation according to the table below, again, based on perceptions.

The resulting 133 suggested actions often overlapped and occupied several different prioritisation sections. These have been themed and grouped to create an overview of recurring themes with a percentage showing the frequency of occurrence in the suggested actions. It is important to state that these are not recommendations, but perceptions of what effective action should look like.

It is worth noting that the perception of what is a “quick win” and what is a longer-term challenge varied and so the same issues came up across in each section. There was, though, a repeated feeling that even the more complex and challenging solutions needed to at least be started – that beginning the process was something that could be done quickly.

Finally, the groups were asked to identify one or two “vision” words that they felt were important to shape the direction of the Visitor Management Plan, which have been collected in a word cloud.

8.ii. Prioritisation Grid

	Easy wins Relatively low effort Consensus that we need to do this Lowish risk, lowish investment, well-defined Can be delivered quickly (2026/27)	Steady gains Medium effort, medium investment Consensus can probably be acquired relatively easily Funding route clear (ish) (1-3 year delivery)	Big wins Complex, multi-stakeholder Contentious, high effort, high gain Needs big investment and investment monies challenging/not yet clear (2-5 year delivery)
Must do Safety Critical preservation of landscape, heritage and wildlife Statutory duty Compelling immediate priorities			
Should do We don't have to but there would be a recognised and valuable gain in community/economy/environmental terms Consequences if you don't Scope for a good outcome			
Could do Makes sense but not such a pressing priority			
Won't do (for now) Good idea but not a priority			

8.iii. Summary insights

The workshop was responding to the data from the Community Stories platform and the Stakeholder Conversations and the overall response to the data showed a strong recognition of the key areas of concern from this data.

These can be summarised as infrastructure challenges, where visitor numbers outstrip infrastructure (with particular emphasis on toilets, public transport and roads); the tension between footfall and preservation of historic sites, specific challenges around coach and cruise, and the crowding of the X1 and frustrations around campervan use.

There was some surprise at the impact of cruise on the NHS by those who weren't aware, while others were surprised that people weren't aware. There was also surprise at the high number of short-term lets there are in Kirkwall (1 in 13) and Stromness (1 in 10).

There were questions around the number of participants in the Community Stories platform – are we reaching the right people? Is there consultation fatigue? However, it was acknowledged that the themes from the platform matched those from the stakeholder conversations adding validity and thus representing viable perception data.

The overall message was that tourism is a vital part of Orkney life and much good work is being done. However, the balance has shifted away from the community and people feel uninformed and 'done to' rather than 'done with'. There was a strong willingness to engage in the action planning, with the aim that OIC needs to work with the community to create a tourism strategy that is robust, community-led, proactive and balanced.

8.iv. Summary of themed prioritised actions

133 comments were gathered in the prioritised grid, some overlapping more than one theme. The following actions are not recommendations, but perceptions of actions that OIC need to take to improve tourism and resolve current issues.

1. Communication: marketing and community involvement (21%)

There was a strong call to improve openness and communication from OIC covering the following actions:

- Create a designated Sustainable Tourism Development Team to create and sustain joined-up thinking around tourism, deciding first what kind of destination Orkney wishes to be, with what mix of tourists. in what volume and with what mitigation of impact. Include an economic impact assessment of tourism in Orkney to establish an up-to-date value of different market segments and establish whether there is any causal interaction between sectors e.g. does volume of cruise impact overnight market etc. Have a team – with a senior leader – able to shape, coordinate and galvanise vision, strategy and implementation, and work collaboratively with the community and local businesses, allowing for more place-based plans to support communities to identify and progress their tourism aspirations.
- Website and Comms: Update and clean up website and other marketing: make it easier to access and to see who to contact; include clearly visible information on where to park campervans, how to use the roads, where facilities are etc (also available as

leaflets); include clearer ways to help visitors understand how to interact with vulnerable sites and create more visible calls for mandatory suggested donations (eg museums and cathedral). Create an active visitor management app with live data showing busier/less busy areas and visitor advice.

- Joined-up thinking: working with stakeholders and the Scottish Government to be more evidence-based. Examples included:
 - starting conversations with landowners about being more amenable to selling/gifting land for community use, eg cycle paths, footpaths, bridleways and maintain them.
 - creating cycle/foot paths from the power cable routes.
 - making strong representation to Scottish Government around ferries, cruise ship plans and NHS impact.
 - getting formal agreement that community planning partnership and community planning approaches need to acknowledge and take into account summer populations levels instead of service planning based on permanent resident numbers only.
 - having strategies for all weathers to keep the balance of tourism from overwhelming particular sites.
- Repeat this survey again in 2026 and beyond, ideally with a dedicated website – aim to build community engagement and expectation that you will be heard. Report data regularly and act on findings/perceptions/suggestions.
- Take action: stop talking and put in the resources to get started – even the complex stuff needs STARTING and the community needs to be informed.

2. Transport (32%)

The issue of transport was a recurring theme with a general sense that the transport infrastructure is currently not fit for the volume of tourism. It was felt that this needed a specific multi-stakeholder active travel working group with remit to produce costed plans for significantly improved active travel for locals and visitors.

Actions fall into four categories.

- Roads (15%): Suggestions called for better signage (particularly for campervans using inappropriate roads or car parks), wider roads, more regular cleaning (especially in narrow town streets), more (and longer) passing places and viewpoints (with toilet provision); a review of the safety and pavement provision around key sites (Stenness and Brodgar, Scapa distillery etc); clearer crossings in towns; a change to planning requirements so pavements / footpaths must be built as part of new tourist attraction; agreement on which roads are suitable for coach use and put in place signage and controls to control coach access; development of a network of smaller campervan sites and aires; creation of a limited number of chargeable parking spaces for campervans in car parks and collect payment via a QR code.

- Buses (10%): There needs to be extra buses, particularly between Stromness and Kirkwall to enable residents to have appropriate transport when cruise ships are using the X1. Suggestions included reserved buses for locals only; shuttle buses on cruise days; an uber-style service on busy days; community electric buses; incentivising private enterprise to run buses at busy times, prioritised seats held for locals on key routes and an electric light railway between Stromness and Kirkwall.
- Cycle paths and footpaths (5%): Start thinking about cycle lanes now – build it into all future development; use the SSE cable route; improve the network; talk to landowners; create a strategy.
- Inter-isles ferries (2.5%): Limit visitor cars and mobile homes on ferries, invest in community transport so islanders/visitors don't have to take own transport; keep some reserved ferry capacity on inter-isles ferries for islanders and give islanders priority on standby.

3. Cruise ships (10%)

Almost a third of comments about cruise ships asked explicitly for clear information regarding money coming in from cruise and where/how it is spent with ideally an independent, community plan for this. Other actions include:

- An urgent need to investigate the impact of cruise on the NHS – pharmacies, the Balfour, doctors etc. This needs to include how any NHS Orkney recharge works – does this recharging take more staff and money?
- Better communication from harbours with more control of ship and passenger numbers.
- Better communication from cruise ships to their passengers around rules/expectations re cycling, narrow roads, etc.
- Reduce or review cruise ships numbers /cruise ship passenger numbers to take a more nuanced approach – assessing **value** rather **volume** and responding accordingly to create a mix that works for the whole of Orkney.

4. Toilets and waste facilities (12.5%)

Recognition that adequate toilets depended on coach toilets and public toilets as well as waste facilities. Actions:

- Provide extra toilets in and around main sites with good parking and portable or parttime toilets in smaller sites.
- Create community-managed toilets with charging arrangements (with locals having a free pass).
- Install chemical toilet disposal points at Hatston, Stromness, Houton, available for coaches and campervans and at car parks regularly used by campervans (eg Skail).
- Do it like Glastonbury and extend the 28-day without planning permission rule.
- Encourage/incentivise working toilets on coaches.

- A specific suggestion for Brodgar was to update and extend the toilet at Orkney Trout Fishing Association, negotiating a financial arrangement with them money so all can use them.

5. Facilities for campervans (15%)

There was strong feeling that campervan facilities, volume and movement needed better monitoring and regulation, and the actions to do so fall under **marketing, toilets and transport and roads**.

6. Tourist information provision that informs and protects (7%)

There was a strong awareness of the loss of the Kirkwall Travel Centre and how information for tourists can be difficult to disseminate. Actions:

- Incentivise the reopening of Visitor Centres in Kirkwall and Stromness – do not let planning rules block this.
- Investigate whether visitor centres could be community-led.
- Invest in a better shop/visitor centre/facilities at the cathedral.
- More notice boards, leaflets etc (also on website) with accessible information on road awareness, how visitors can better understand the wildlife; more information on smaller sites and how to interact with them respectfully etc.
- Can Orkney guides have protected status so that certain tours cannot go ahead without a certified local guide?

7. Visitor levy at point of entry (4%)

Action: we should have a visitor levy at point of entry to fund infrastructure – using the same/similar rules as Air Discount Scheme and ferry travel (friends and family) for locals. The money must be ring-fenced to be spent on initiatives that benefit both residents and tourists rather than going into core funding.

8. Short term lets (STL) (4%)

- Carry out STL research to understand the nature of current stock and put schemes in place which minimise loss of residential homes to STLs in Kirkwall and Stromness
- Explore ways in which the STL implementation has disadvantaged ferry linked isles (e.g. Rousay due to private water supply) and use the Islands Act to get solutions if needed or use local discretion
- Put a cap on numbers of STL especially in towns, including using housing control on new buildings used for short term lets. This needs to be nuanced so that STLs grow alongside residential housing not instead of it.

9. A more robust relationship with Historic Environment Scotland (HES) and HES-run sites (5%)

There was a widespread perception that HES sites are currently run for HES national profit rather than local best interest. Actions:

- OIC should take back management of HES sites and assets so there is active local/community management.
- Non HES sites to be community-led.
- Stop HES “spoiling” World Heritage Site – saying no to a visitor centre there

10. Other suggested initiatives (4%)

Initiatives to support more places to eat in West Mainland; a universal basic income in Orkney; Longer opening hours in hospitality and at attractions; Funding for part time workers at smaller sites to support a wider visitor experience; better disabled access across Orkney

8.v. Vision words

The four workshops were asked to think about key ideals that OIC should hold at the heart of the Visitor Management Plan. The following word cloud represents the collated words, with the words sized according to frequency.



8.vi. Granular data of themed prioritised actions

Must do quick wins

1. Communication: marketing and community involvement (12 comments)

- Improve openness and communication from OIC:
- clear presence on websites, easy access for community contact (with names of who to contact), consideration of the language used to describe tourism (eg 'volume tourism' rather than 'coach and cruise') and use this to help counter media negativity (eg recent national press article).
- Include clarity on website (and leafleting) over where to park campervans, using the roads, where facilities are etc. Improved marketing to help visitors understand how to interact with vulnerable sites.
- Repeat this survey again in 2026 and beyond, ideally with a dedicated website – aim to build community engagement and expectation that you will be heard. Report data regularly.
- General call to action – stop talking and get started – even the complex stuff needs STARTING.
- Create a collaborative tourism strategy which sets out vision, strategy and implementation; More place based plans to support communities to identify and progress their tourism aspirations and preferences / an addition to the place plan process that focuses on tourism.
- Mandatory suggested donations at all OIC museums and Cathedral and more prominent marketing to encourage payment

2. Communication: transparency re cruise money (4 comments)

- We need clear, simple information regarding money coming in from cruise and where/how it is spent with a community plan for the spend.

3. Cruise and Harbours specific (5 comments)

- Dedicated Harbours cruise comms and engagement support to enable better and more transparent comms including in season comms so that this isn't coming from OIC.
- Better / more control of ship and passenger numbers by Harbours – we need more sustainable volumes of liners / more sustainable approach.
- Cruise ships to inform passengers of rules/expectations re cycling, narrow roads, etc;
- Coordinate cruise marketing with rest of destination marketing so we are clear what market Orkney is going after and how we serve them.

4. NHS and impact of cruise ships (2 comments)

- Gather the facts about impact of cruise on NHS and OIC to clarify. Does recharging take more staff and money?

5. Toilets and toilet facilities for campervans and camping site infrastructure (7 comments)

- Toilet facilities at Brodgar – do it like Glastonbury and extend 28 day without planning permission rule.
- Chemical toilet disposal points at Hatston, Stromness, Houton, available for coaches and campervans.
- Extra toilets in and around main sites.

- Portable or parttime toilets in smaller sites.
- Charge for all local toilets with local having a free pass.
- Create more camper van chemical waste emptying point e.g. at Skail toilets (aligned to sites that we want to encourage campervans to stay at).
- Determine key site capacities and create plans which enables sites to run within, not over capacity.

6. Cycle lanes (2 comments)

- Start thinking about cycle lanes now! Cycle path from Hatston to Finstown on the SSE cable route.

7. Roads, road signs & buses (13 comments)

- Establish multi stakeholder active travel working group with remit to produce costed plans for significantly improved active travel for locals and visitors.
- Clean Stromness streets – including small lanes. (Accidents here cost the NHS).
- Road crossings in town made official/better defined.
- Poor roads – not enough money spent on edges of roads outside the town limits.
- Review of speed limits and pavement provision around sites where tourists are walking e.g. from Stones of Stenness to past the Brodgar carpark and on the Orphir road where the Scapa whisky visitor centre now is.
- Better signage to stop camper vans driving up the street in Stromness.
- Clearer signage to indicate which carparks are not to be used for overnight parking.
- Locals-only smaller bus covering the X1 route over summer / on busy liner days with access only to people with a local travel pass.
- Priority seats held for locals on X1 bus in summer / busy liner days.
- Better planning for transport – extra buses, wider roads with more passing places.
- Smaller bus for locals only on X1 route.
- Encourage set up of a local Uber service to create more taxi capacity on busy liner days as a solution to X1 bus capacity issue.

8. Short term lets (3 comments)

- Explore ways in which the STL implementation has disadvantaged ferry linked isles (e.g. Rousay due to private water supply) and use the Islands Act to get solutions if needed or use local discretion.
- Carry out STL research to understand the nature of current stock and put schemes in place which minimise loss of residential homes to STLs in Kirkwall and Stromness.

9. Ferry-linked isles (3 comments)

- Limit visitor cars and mobile homes on ferries.
- Invest in community transport so don't have to take own transport.
- Reserved ferry capacity on inter-isles ferries for islanders and priority on standby.
- Explore ways in which the STL implementation has disadvantaged ferry linked isles (eg Rousay due to private water supply) and use the Islands Act to get solutions if needed or use local discretion.

Must Do Steady Gains

1. Travel Centre (2 comments)

- Keep Visitor Centre open in Kirkwall and Stromness.

2. Toilets and coach facilities (6 comments)

- More toilets in places with good parking.
- Working toilets on coaches and waste disposal facilities.
- Community management of toilets. OIC to own building and communities to run with a combination SLA with OIC and charging arrangements.
- Toilets near Brodgar – update and extend the one at Orkney Trout Fishing Association – give them money so all can use them.
- Charge for toilet use.

3. Cruise ships and Harbours (3 comments)

- Cap on cruise ship numbers on any one day to be lower.
- Fewer in total – more cruise ship-free days.
- Agree a cruise strategy which Harbours and OIC are committed to working within that pursues a more premium pricing /nuanced approach (eg less volume but equal income).

4. Short term lets (1 comment)

- Cap on numbers of short term lets.

5. Clear planning, vision and execution (5 comments)

- Create a Destination Management Organisation with a senior leader who can shape, coordinate and galvanise delivery.
- Agree a tourism strategy which determines what kind of destination Orkney wished to be, with what mix of tourists. in what volume and with what mitigation of impact.
- Put resources in place to deliver the strategy (“stop expecting paper strategies with no supporting resource to change things”).
- Carry out an economic impact assessment of tourism in Orkney to establish an up-to-date value of different market segments and establish whether there is any causal interaction between sectors e.g. does volume of cruise impact overnight market etc.
- Implement a volume tracking system for all coach traffic in Orkney to allow better traffic and flow management.

6. Roads and planning (4 comments)

- Change planning requirements so pavements / footpaths must be built as part of new tourist attraction e.g. Scapa whisky visitor centre where visitors are walking on a busy road.
- Roads strategy to restrict heavier coach traffic on smaller roads.
- Improve/extend passing places to allow coaches to pull in.
- More viewing sites to create places where coaches can pull in particularly around Scapa Flow e.g. similar to Olad Brae.

7. Point of entry levy (1 comment)

- Implement a point of entry levy to fund tourism. Money must go to a third party not OIC so that it will be spent on initiatives that benefit both residents and tourists rather than going into core funding.

8. Facilities, information and parking for campervans (4 comments)

- Support development of a network of smaller campervan sites and aires.
- More clarity (eg maps on ferries) on where campervans can and cannot stay overnight and where facilities are – and enforcement of this.
- Create a limited number of chargeable parking spaces for campervans in car parks and collect payment via a QR code.

9. Cycle paths (1 comment)

- Create cycle paths.

Must Do Big Wins

1. Point of entry levy (2 comments)

- Progress point of entry levy; Tourist levy at point of entry and used for community purposes.

2. Toilets (2 comments)

- Have community owned and run public toilets.

3. Tourist Information/Travel Centre (2 comments)

- Get tourist info centre reopened – OIC to be supportive in terms of length of lease and incentivising this – community led? In Stromness and Kirkwall.

4. Roads & transport (2 comments)

- Look at safety between Brodgar and Stenness.
- Community run bus between different sites.

5. Coach drivers (1 comment)

- Coach drivers from outwith Orkney to pass 'Orkney familiarisation' test and/or must have Orkney guide on board.

6. Management of Sites currently under HES (2 comments)

- Orkney takeover of HES sites and assets in Orkney. No to a visitor centre there at the WHS.

7. SLT (1 comment)

- Housing control required on new buildings used for short-term lets.

8. Cycle paths (1 comment)

- Cycle paths joined up.

9. Disabled access (1 comment)

- Disabled access in general (for residents as well).

Should Do Quick Wins

Transport (3 comments)

- Taxis and buses for locals/tourists
- Rationing or controlling of visiting coaches/minivans for ferry traffic - prove you have booked ahead.
- Strategy for poor weather options to tour bus managers/cruise companies.

2. Strategy and leadership (4 comments)

- OIC employ a 'sustainable tourist development manager' and team. The strategic manager then works with tour companies to ensure that the tours they have planned are sustainable and workable in Orkney.
- Get formal agreement that community planning partnership and community planning approaches need to acknowledge and take into account summer populations levels instead of service planning based on permanent resident numbers only.
- Strategy for poor weather options to tour bus managers/cruise companies.
- Put the folk who organised the island games in charge of tourism!

3. Tourist information (3 comments)

- More effort to help visitors to understand the wildlife.
- More info boards, leaflets etc to stop overnight parking.

4. Local guides (1 comment)

- Protected status for local guides (i.e. you can't take a tour in Orkney without using a certified local guide).

5. Toilets (1 comment)

- Coach toilet emptying facilities in St Margarets Hope, Stromness and Kirkwall.

Should Do Steady Gains

1. Roads, buses and coaches (5 comments)

- Community electric buses for sustainable engagement with visitors.
- Stage coach/private enterprise to be incentivised to run extra buses at peak times.
- New parking viewpoint for tourist coaches – ideally with toilets and other facilities (the more often a coach stops the less miles it drives so less damage to roads etc).
- Agreement on which roads in Orkney are suitable for coach use and put in place signage and controls to control coach access.
- Communicate to cruise passengers that they MUST prebook Skara Brae (etc) if going on X1.

2. HES & non-HES sites (3 comments)

- HES – local remit for Orkney under the Islands Plan and non-HES sites to be community-led.

3. Incentivise hospitality and smaller sites (2 comments)

- Longer opening hours in hospitality and at attractions.
- Funding /incentives for part time workers at smaller sites to support a wider visitor experience.

4. Cycle paths and footpaths (2 comments)

- Improved and linked footpaths and cycle routes.

5. Visitor levy (2 comments)

- Visitor levy to fund stuff – at point of entry – airport, ferries, cruise ships (exclude close family) – using same rules as ADS and ferry travel (friends and family).
- Support the develop of a 'come as you are' to the isles schemes which enable visitor to leave cars on mainland rather than take ferry spaces.

Should Do Big Win

1. Joined-up thinking and infrastructure (6 comments)

- Start conversations about landowners being more amenable to selling/gifting land for community use, eg cycle paths, footpaths, bridal ways and maintain them.
- Make the power cable route Kirkwall-Finstown-Stromness a footpath/cycle path. Start this conversation!
- Make representation to Scottish Government on adequate external ferries – cabins, car space, advance booking etc.
- Active visitor management app with live data showing busier/less busy areas and visitor advice.
- Determine capacity agreement with HES for key sites and set an Orkney-wide visitor volume plan that either works within those limits or fast tracks infrastructure work required to run at higher capacity without damaging sites or visitor / locals experience.
- NHS Orkney strategy plan for cruise ship days – joined up thinking (ideally nationally).

2. Transport (2 comments)

- Electric light railway from Kirkwall to Stromness via WHS.
- Step on step off, circular route electric tourist bus for popular sites.

3. Cathedral (1 comment)

- Better shop/visitor centre/facilities at the cathedral (1 comment).

Could Do Steady Gain

1. Transport (3 comments)

- Shuttle bus between Stromness & Kirkwall.
- Size limit on vehicles going to Broch of Birsay.
- Put power cables under roads = getting new road surfaces in the bargain and only one owner to negotiate with.

Could Do Big Win

1. Hospitality initiatives (1 comment)

- More places to eat in the west mainland – initiatives to support this?

2. HES (1 comment)

- OIC should take back management of HES sites and assets so that it isn't a HES cash cow and there is active local/community management and avoids another mixed up management plan.

Won't do for now Big Win

1. Idealism (1 comment)

- Orkney is so wealthy we have a universal basic income!