



Visitor Management Plan 2027 – 2037 Consultation Summary

Draft August 2026

Sustainable Tourism
Enterprise and Economic Growth

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1. Introduction

Tourism is vital to Orkney's economy. In 2024, an estimated 450,000 visitors generated more than £114 million in expenditure, supporting employment and sustaining many local businesses that serve both residents and visitors. Orkney attracts visitors from around the world through the islands' internationally significant natural and cultural heritage, award-winning food and drink, high-quality arts, crafts and designs, and a year-round calendar of events.

Visitor numbers have risen steadily over the past two decades, particularly within the cruise segment, and this trend is expected to continue. High seasonal visitor arrivals during a concentrated summer season between May and September can place sustained pressure on Council services, infrastructure and public spaces. Key sites, main towns and transport services can experience crowding and congestion, while ageing infrastructure and gaps in essential facilities make it challenging to meet the needs of both residents and visitors.

The Council supports vital elements of the tourism system and plays a central role in safeguarding the places, services and experiences that define Orkney, but fiscal and operational constraints limit the Council's ability to meet growing demand. As tourism is not a statutory service, there is no ring-fenced funding for long-term investment. Therefore, the Council continues to engage with the Scottish Government and key stakeholders on alternative levy models that may be appropriate to island circumstances and could provide sustainable funding for tourism. However, there is a possibility that a viable tourism levy model may not materialise for several years, if at all. In the meantime, the Council must manage growing demand within limited resources. Sustaining the public services that support tourism will also require close collaboration across Council services, with communities helping to inform priorities so that action delivers positive local outcomes.

The Visitor Management Plan (VMP) provides a structured, evidence-based approach to managing tourism pressures within the Council's remit.

2. Purpose and scope

The VMP provides a structured, evidence-based approach to managing the impacts of visitor activity on Council services, assets and public spaces. Its purpose is to ensure that tourism supports community wellbeing, protects public services and contributes positively to resident quality of life and the visitor experience.

The plan focuses exclusively on operational visitor management, meaning the practical conditions that influence how visitors interact with Orkney's places and communities. It identifies pressures on Council services, prioritises interventions and sets out the operational measures required to maintain public service resilience under seasonal tourism demand. This ensures coordinated, sustainable and service-focused responses within the Council's remit.

The VMP is not a destination management plan. It provides the basis for the Council's contribution to destination management by setting out how Council services, infrastructure

and public spaces are managed and maintained in response to visitor pressures, but it does not assume wider destination management responsibilities.

It is also not a capital investment plan. Capital tourism projects sit within the Council's draft Strategic Tourism Infrastructure Development Plan (STIDP) which will be reviewed this financial year. The VMP informs the STIDP by identifying where operational pressures indicate a need for future investment.

Further detail is available in Section 1.2 of the VMP.

3. Aim and objectives

The VMP provides an evidence-based approach to strengthening the quality and resilience of Council services that support tourism. Its aim is to deliver targeted interventions that manage visitor impacts, safeguard community wellbeing and protect natural and cultural heritage.

To deliver this, the plan focuses on three core areas:

- **Community and experience** – maintaining access to Council services and public spaces, protecting Council-managed assets and improving the experience for residents and visitors.
- **Operational pressure and management** – relieving pressure on infrastructure and services and strengthening cross-service coordination.
- **Investment and resourcing** – prioritising activity, identifying resourcing needs and exploring opportunities for income generation and savings.

Further detail is available in Section 1.4 of the VMP.

4. Council priorities and tourism remit

The Council Plan 2023-2028 sets four strategic priorities: Growing our Economy, Strengthening our Communities, Developing our Infrastructure and Transforming our Council. These are underpinned by core principles that guide decision-making, including environmental protection; climate action; equality, fairness and inclusion; sustainable and accessible services; community wellbeing; and community wealth building. Tourism relates directly to each priority. The first three shape how the Council responds to tourism pressures and opportunities, while the fourth provides the organisational capacity needed to deliver effective responses. The VMP contributes to these priorities by strengthening the resilience, quality and sustainability of Council services that support tourism, reinforcing the Council's wider economic, community, infrastructure and organisational aims.

Further detail is available in Section 2.1 of the VMP.

The Council plays an important role in supporting the tourism system and managing tourism impacts on infrastructure, services and communities through three areas of responsibility.

- **Mandatory duties** – legally required services such as managing the Harbour Authority, maintaining roads and providing public transport.
- **Permissive powers** – activities the Council chooses to deliver, including strategic tourism planning, economic development with tourism as a priority sector, museums and leisure services such as camping facilities, and support for community-led local development.
- **Regulatory powers** – statutory functions including licensing of short-term lets, taxis and private hire vehicles.

The Council Delivery Plan 2023-2028 identifies sustainable development of tourism, hospitality and destination management as a priority within a wider commitment to supporting and investing in businesses across Orkney. This reflects the Council's role in contributing to destination management alongside other partners, while not leading it.

The VMP provides a structured approach to identifying pressures on Council services, prioritising interventions and supporting the sustainable development of tourism.

Further detail is available in Section 2.2 of the VMP.

5. Regenerative tourism

A regenerative tourism approach underpins the VMP, focusing on actively improving the long-term health and resilience of places and communities. It offers a practical and necessary evolution in how tourism is understood and managed, as simply sustaining the status quo is no longer enough. This approach reframes tourism's purpose, positioning it to support community wellbeing, protect the places people value and sustain an essential cornerstone of Orkney's economy. This recognises that great destinations are built on thriving places and that the quality of life for residents is inseparable from the quality of experience for visitors.

In this model, success is measured by community wellbeing rather than visitor volume, with community needs guiding decision-making.

For the Council, applying regenerative principles means:

- Safeguarding community access to Council services and public spaces
- Protecting natural and cultural heritage
- Supporting long-term sustainability of public services and infrastructure
- Aligning with wider Council commitments to climate action, community wealth building, inclusive growth and sustainable public services

Within the VMP, regenerative tourism provides the lens for prioritising interventions and guiding timely actions that respond to pressures, strengthen conditions for community

wellbeing, and ensure tourism contributes positively to the places residents value and the public services they rely on every day.

Further detail is available in Section 2.5 of the VMP.

6. Evidence base

The VMP is underpinned by a robust evidence base drawn from three core sources that reflect the views of different stakeholder groups:

- Our Orkney, Our Story research project – community and industry
- Internal Operational Review – Council services that support tourism
- Orkney Islands Visitor Survey 2024 – visitors

Additional sources, including Local Place Plans for Birsay, Dounby and Stenness (the only ones currently registered with the Council) and the Orkney Matters One and Two engagement outputs, were used to validate the core evidence, confirming that the issues identified align with wider community concerns.

Further detail is available in Section 3.1 and Appendix 2 of the VMP.

Income generation and savings research was also undertaken to identify options to support the financial sustainability of Council services that support tourism. This included engagement with local stakeholders, discussions with other Scottish local authorities and targeted further research.

Further detail is available in Section 3.1 and Appendix 3 of the VMP.

7. Key issues

The evidence analysis identified three connected elements, including high-level themes, cross-cutting issues and systemic conditions, as well as income generation and savings opportunities to support the financial sustainability of services that support tourism.

Further detail is available in Section 4 of the VMP.

7.1. High-level themes

Seven themes describe the main points of intersection between visitor activity, community wellbeing and Council services and infrastructure. These provide the organising structure for the issues analysis and the Action Plan.

- Governance, strategy and transparency
- Visitor information, behaviour and communications
- Transport, roads and movement

- Volume tourism management
- Essential infrastructure
- Visitor accommodation and residential housing
- Internal Council administration

7.2. Cross-cutting issues

Eight cross-cutting issues span multiple themes, services and locations. These cannot be resolved through isolated interventions and therefore require coordinated multi-service responses.

- Seasonal pressure on Council services from concentrated visitor demand
- Transport capacity constraints on public service buses and certain ferry sailings, combined with timetable limitations and visitor difficulty interpreting schedules
- Pressure on infrastructure not designed for current visitor volumes, with maintenance backlogs exacerbated by budget and staffing constraints
- Fragmented visitor information across Council and destination platforms, and no dedicated in-person visitor information service since the Kirkwall iCentre closure
- High visitor volumes at sensitive natural and cultural sites beyond what they were designed to accommodate
- Irresponsible visitor and business behaviour linked to gaps in key infrastructure, visitor information and responsible tourism messaging
- Reduced housing availability influenced by conversion of residential properties to short-term lets
- Limited internal coordination and reduced staffing capacity

7.3. Systemic conditions

Five systemic conditions underpin many of the cross-cutting issues and explain why a structured, coordinated plan is required.

- Community trust and participation erosion
- Funding and resource limitations
- Data and monitoring gaps
- Policy and strategic alignment challenges
- Resident and visitor needs imbalance

7.4. Income generation and savings

Income generation and savings options were explored to support the financial sustainability of public services that support tourism. These are complementary to, not dependent on, future tourism levy decisions.

- Optimising existing income streams
- Introducing new income streams
- Improving operational efficiencies

8. Action plan

The Action Plan translates evidence into a practical, prioritised programme of work. It is guided by eight principles that reflect the Council's commitments to responsible tourism, community wellbeing, sustainable public services and a regenerative approach to tourism.

- Evidence-led
- Community-centred
- Visitor management focused
- Remit-aligned
- Deliverable and resourced
- Financially sustainable
- Cross-service and partnership-oriented
- Responsible and regenerative

The Action Plan sets out practical measures that respond directly to the issues identified in the evidence base and provides a clear programme of work within the Council's remit.

- **Physical and operational improvements** – actions that relieve pressure on roads, public toilets, parking, transport services and key sites, and improve community access to Council services used by residents and visitors such as public buses and ferries.
- **Educational and behavioural measures** – actions that improve visitor information, responsible tourism messaging and clear guidance for specific visitor groups such as motorhome users, cruise passengers and tour operators.
- **Research and strategy development** – actions that strengthen governance, improve data and monitoring, assess feasibility of digital visitor management tools, and develop coordinated approaches to managing cruise tourism pressures and destination-level planning and development in collaboration with partners and key stakeholders.

Actions will be resourced through existing budgets, income optimisation, new income streams, external grants, and targeted new allocations as needed.

Further detail is available in Section 5 of the VMP.

9. Delivery and review

Delivery of the VMP will be coordinated through a cross-service officer group. The group will plan and deliver operational activity, share intelligence on visitor pressures, support action

development, identify emerging issues and ensure alignment with statutory duties and corporate priorities.

The Council will also work with external partners to share information, coordinate messaging, support responsible access, align interventions and identify opportunities for joint working.

The Action Plan will be reviewed annually to assess progress, consider new evidence and operational pressures, update priorities where needed and ensure alignment with the STIDP and other relevant plans. Annual updates will be coordinated through the cross-service officer group and reported through the Council's established governance processes.

Further detail is available in Section 6 of the VMP.