

Put in context: place-based sustainable tourism strategy evaluation in the Orkney islands.

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PUT IN CONTEXT: PLACE-BASED SUSTAINABLE TOURISM
STRATEGY EVALUATION IN THE ORKNEY ISLANDS

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ABSTRACT

This study proposes a method for understanding the local contextual circumstances and their effect on tourism-related sustainability needs. Based on this understanding, it offers a Place-based Strategy Evaluation Framework (PSEF), that can recognise whether tourism strategy addresses these context-specific sustainability needs of a local destination. Using the Orkney Islands as a case study, this research focuses on the sense of place of the members of Orkney communities as a foundation for their perceptions of tourism value and sustainability needs in the tourism context.

Underpinned by pragmatism and interpretivism, this study aims to create actionable knowledge, which is used to evaluate the Orkney Tourism Strategy 2020-2030, as a tool for sustainability transition in tourism. This knowledge provides not only an understanding of the lived experiences of Orkney people and their sustainability meanings but also uses it to contribute to a practical solution of a complex context-dependent problem. To achieve its aim, the study uses a multi-method qualitative methodology, consisting of semi-structured interviews with the members of Orkney communities, as well as unstructured observations, underpinned by the digital ethnography elements.

The findings of this research confirm that sustainability in tourism is highly contextual and that studying the layers of context of a destination is essential for its sustainability transition. They also reveal that the sense of place of the residents is a key contextual factor and that its understanding can provide a firm basis for aligning the strategic direction for sustainable tourism development. Moreover, the Orkney case study showed that the context-specific sustainability definition is driven by the perception of tourism value, underpinned by the perception of benefits and impacts of tourism development on the destination. These perceptions are driven by the alignment of the development to the sense of place of Orkney residents and by the degree of transparency of the benefits distribution across the archipelago. The relationship between these elements is underpinned by power dynamics between the variety of tourism stakeholders, as a binding element of the sustainable tourism strategy implementation.

The study makes a theoretical contribution to the field of strategic planning by proposing a place-based value-driven approach to sustainability transition in tourism in Orkney and beyond. The proposed PSEF tool delivers a practical contribution to destinations, undergoing their sustainability transition. It also contributes to the field of tourism to cold-water islands, as well as to the currently understudied subject of archipelagos. By using a pragmatic blend of qualitative methods, this study also provides an innovative methodological approach to studying context-sensitive contested issues, often embedded in sustainability transitions. It alleviates concerns about taking an innovative, non-traditional approach to case study research, where a mix of philosophical perspectives, digital methods and semi- or unstructured data collection approaches can facilitate robust well-rounded research.

Key words: sustainable tourism; islands; archipelagos; cold-water; strategy evaluation; framework; digital ethnography; qualitative; Orkney; Scotland

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I am dedicating this thesis to my Grandmother, who consistently asks me if I am going to be a tour guide since I am “studying tourism”. No, Gran, I will not. And I love you.

The essence of Orkney's magic is silence, loneliness and the deep marvellous rhythms of sea and land, darkness and light.

~George Mackay Brown

CHAPTER 1

Introduction

Over the past few decades there has been a “cloudburst” of tourism publications, as a “fashionable area of academic study” (Stevens 2020 p.204). Nonetheless, researching tourism is not only fashionable but essential, since tourism is one of the major forces, impacting people and places across the globe (Higgins-Desbiolles 2006). While the reliance on tourism is ever-growing, however, the sustainability impacts associated with it continue to gain extensive attention. Therefore, with sustainability being an inherently long-term aspiration, it is argued that a strategic approach must be taken to ensure sustainable tourism development (Hall 2000; 2001).

Yet, it is also argued that while major sustainability issues, associated with tourism, can only be tackled on a global scale (Hall 2011b), it is the local sustainability strategies that deserve particular attention. This is because the sustainability needs of local communities are highly context-dependent, and meeting those requires local action (Renfors 2021). This study, therefore, contributes to addressing some of these issues in the context of the rural cold-water archipelago, Orkney Islands, in Scotland, by proposing a value-orientated place-based framework, as advocated by Horlings (2015), which can be used for sustainable tourism strategy development and evaluation.

1.1 Strategy and Sustainable Tourism Development

From books and dedicated academic journals to a plethora of academic articles, sustainable tourism is woven into nearly any tourism discourse in academic, policy, and business circles (Hall 2011b). Sustainable tourism is a part of the sustainable development principle, which is defined as:

“development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (WCED 1987, p.41).

This principle was developed to address the impact of developments in various spheres, such as food, energy, transport, environment, and industries. This includes the impact of the tourism industry, leading to the emergence of sustainable tourism development concept. The concept, therefore, has been included in decades of research, exploring the tourism sector and its impact on the wider economy and environment (Liu 2003; Zolfani et al. 2015).

United Nations World Tourism Organisation (UNWTO) define sustainable tourism as:

"tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (UNWTO 2020).

In 2015, 17 Sustainable Development Goals were agreed upon by the world leaders at the UN summit on sustainable development as a “shared blueprint for peace and prosperity for people and the planet, now and into the future” (UNDESA 2021a). These goals are set to address economic, socio-cultural and environmental concerns in 5 main domains – people, planet, prosperity, peace and partnership, and the goals are planned to be met by 2030 (UNDESA 2015). The 2030 Agenda for Sustainable Development places sustainable tourism under Sustainable Development Goal (SDG) 8, to “devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products” (UNDESA 2021b). In addition, sustainable tourism is also highlighted in SDG 12 to “develop and implement tools to monitor sustainable development impacts for sustainable tourism” and 14 to “increase the economic benefits to Small Island developing States and least developed countries” (UNDESA 2021b). Although tourism is only explicitly mentioned in these three goals, it has the

potential to contribute directly or indirectly to every SDG on the list (Rasoolimanesh et al. 2020). One such goal is SDG17 – Partnerships, which is of relevance to the tourism industry due to the multi-stakeholder nature of the industry and the need for effective, long-term partnerships between various parties to achieve its objectives (Adie, Amore and Hall 2020).

Sustainable tourism, and its parent concepts of sustainability and sustainable development, received a significant amount of critique in the academic literature. This critique is often directed towards the ambiguity of definitions (Butler 2018; Redclift 2005; Liu 2003; McCool, Moisey and Nickerson 2001), excess of indicators (Agyeiwaah, McKercher and Suntikul 2017; Tanguay, Rajaonson and Therrien 2013), and challenges in pursuing a balance between economic, social and environmental objectives (Hall 2019; Scheyvens, Banks and Hughes 2016; Gibson 2013; Bramwell and Lane 2011; Higgins-Desbiolles 2011; Hunter 1997).

Criticising the term 'sustainable tourism' many authors emphasise that research in sustainable tourism is too focused on individual industries, which is futile, and that sustainability on the whole should be pursued (Butler 2018; Nowacki et al. 2018). It is also pointed out, that instead of focusing inwards on the sustainability of the tourism product itself, sustainability should be integrated into wider strategic development plans (Sharpley 2000). This will ensure that these plans guide destinations to developing tourism sustainably, thus supporting the general sustainability of the destination (Sharpley 2000; Creaney and Niewiadomski 2016). In rural destinations in particular, rural tourism policy and strategy must be aligned with rural development policy, due to the complexity of the rural restructuring processes (Chapter 2) and the fact that rural tourism is taking place in a "multifunctional countryside" (McAreevey and McDonagh 2011 p. 176), where complex realities, needs and opportunities create distinct sustainability challenges.

It is therefore recognised, that tourism and tourism development is not the end goal, but it can be seen as a means to achieve wider goals of sustainable development (McCool, Moisey and Nickerson 2001; Weaver 2005). Sustainable development can also be viewed as a strategy aimed at two separate objectives – sustainability and development, where conceptualising the principles of both

can allow for projecting them onto specific contexts of the tourism industry and destination development (Sharpley 2000). And, although the discourse on the definitions and approaches will remain prominent in the literature, and a plethora of views and opinions will only expand, sustainable tourism principles will guide and focus the quest for acceptable trade-offs between the different goals of sustainable development (Bramwell et al. 2017).

1.1.1 Three pillars

Sustainable development and, subsequently, sustainable tourism, are often positioned based on three principles – environmental, social and economic. These principles were gradually understood and evolved throughout the years from the initial sustainable development concept in 1987 (1.1), and are now widely recognised. In the notable publication “Making Tourism More Sustainable. A Guide for Policy Makers” (UNEP and UNWTO 2005), these three domains are defined, as shown in Table 1.1.

Economic sustainability	Generating prosperity at different levels of society and addressing the cost effectiveness of all economic activity. Crucially, it is about the viability of enterprises and activities and their ability to be maintained in the long term.
Social sustainability	Respecting human rights and equal opportunities for all in society. It requires an equitable distribution of benefits, with a focus on alleviating poverty. There is an emphasis on local communities, maintaining and strengthening their life support systems, recognizing and respecting different cultures and avoiding any form of exploitation.
Environmental sustainability	Conserving and managing resources, especially those that are not renewable or are precious in terms of life support. It requires action to minimize pollution of air, land and water, and to conserve biological diversity and natural heritage

Table 1.1: Three dimensions or ‘pillars’ of sustainable development (adapted from UNEP and UNWTO 2005, p.9)

According to the literature review, conducted by Zolfani et al. (2015), researchers in the tourism field agree that social, economic, and environmental aspects of tourism development are subjects of concern in sustainable tourism development frameworks. These subjects are usually seen as a “triple-bottom-line” (Elkington 1998; Butler 2018) or “the three pillars or domains” (Winther 2017 p. 339) of sustainable tourism and sustainable development. Many other sources discuss economic, sociocultural and environmental pillars, adding a cultural dimension to the social element (Soini and Dessein 2016; Chiu 2004). Many authors argue, however, that the ‘triple bottom line’ is in fact a ‘quadruple’, regarding social and cultural dimensions as distinct pillars (Agyeiwaah, McKercher and Suntikul 2017; Soini and Dessein 2016; Chiu 2004). Regardless of the number of ‘pillars’, however, it is argued that sustainability as a goal cannot be sought by pursuing only one of the above domains, but by creating sustainability in all of them, utilising benefits in one domain to the benefit of another (Creaney and Niewiadomski 2016).

According to UNEP and UNWTO (2005), the domains can reinforce each other, as well as compete, and the goal is to strike an appropriate balance to achieve sustainability. However, although the notion of seeking ‘balance’ or ‘trade-offs’ is considered appropriate by some commentators (see Hunter 1997; Rasoolimanesh et al. 2020), many others argue that seeking balance can mislead towards economic growth (Hunter 1997; Bramwell and Lane 2011; Hall 2011b). To this end, Hall (2019 p. 1045) argues that in the tourism context, even SDGs emphasise market-oriented growth and business, instead of including wider social and environmental concerns.

This concern regarding the prevalence of economic growth in various sustainable development agendas was expressed by earlier commentators even before the 2030 Agenda publication. Critiquing the term ‘sustainable development’, Worster (1994 p. 142) compares seeking consensus between economic growth and environmental needs to a path to a dead-end and says:

“After much milling about in a confused, contentious mood, they have discovered what looks like a broad easy path where all kinds of people can walk along together, and they hurry toward it, unaware that it may be going in the wrong direction.”

Bramwell and Lane (2011) presented several quotes in their literature review, echoing similar observations, arguing that by seeking a balance between economic, social, cultural and environmental concerns, economic needs will prevail, and economic growth will become at the forefront of sustainability discussions in current capitalist society. Driven by the market economy, tourism success is measured in financial terms, and “sustainability comes to mean sustaining tourism and resisting limits imposed on environmental grounds” (Higgins-Desbiolles 2011 p. 556). In support, Gibson (2013) contends that in seeking sustainability, trade-offs should be avoided when basic sustainability requirements, such as environmental integrity and human well-being, are to be met, which can be achieved by early planning and setting appropriate goals and alternatives. However, despite the sound reason for such a statement, this inevitably will prove to be difficult, if not impossible to implement in practice, due to the inherent unsustainable nature of transport, which is a major compound of the tourism industry (Butler 2018).

Additionally, as Scheyvens, Banks and Hughes (2016 p. 380) note:

“however the often rosy ‘triple win’ rhetoric around the SDGs presents a fundamentally unrealistic picture, and one that ignores the clear tensions that are likely to arise between goals of different interest groups”

Similarly, McCool, Moisey and Nickerson (2001), argue that a sustainable tourism definition (referring to social, environmental and economic benefits) is problematic, as it must be shared between different participants, who will have different objectives, values and power, as will be explored in this thesis.

1.1.2 Sustainability indicators

Discussing sustainable development, some commentators raise the question of *what it is that should be sustained*. Redclift (2005) notes that while some authors would argue that present or future production levels should be sustained, significant thought must be put into the differences in production and consumption needs of different layers of society and development levels of countries and regions. The author also argues that the word ‘needs’ in the sustainable development definition (1.1) does not provide any clarity or

direction, since every society will have its own, often competing, needs (Redclift 2005).

Worster (1994), on a similar note, suggests that sustainability can have several different meanings in different disciplines, providing examples of sustainability needs from fields of economics (sustain growth and profit), healthcare (sustain health and nutrition), political and social sciences (sustain political power), and agriculture (sustain soils and people). Yet, despite the widely recognised ambiguity of the definitions and indicators of sustainability and its related concepts, most of the discourse is still concentrated on the balance of environmental, social and economic sustainability.

In tourism research, the discussion on sustainable tourism and sustainable development also remains open-ended without concrete answers or agreed success criteria, and whether tourism needs to be sustained or tourism needs to sustain something. According to McCool, Moisey and Nickerson (2001), tourism should meet the shared needs for social, economic and natural sustainability of three major stakeholder groups – the tourism industry, industry management agencies and residents. When studying opinions of tourism businesses and operators on what tourism should sustain, however, they did not receive consistent results, explaining that this may have been caused by confusion in the meanings of sustainable tourism (McCool, Moisey and Nickerson 2001).

An ambiguity of definitions in sustainable tourism discourse was also discussed by Agyeiwaah, McKercher and Suntikul (2017), who, as result of a meta-analysis of relevant studies, proposed a concise set of manageable and measurable indicators, divided into four main domains, in line with Elkington (1998) triple bottom line. These indicators are presented in Table 1.2.

Dimension	Key indicator	Possible measures
Economic	Employment	Number, type and duration of jobs Gender equity
	Business viability	Expenditure Arrivals Profitability Satisfaction, etc.
Social	Quality of Life	Resident empowerment Congestion and crowding Community attitudes to tourism Access to amenities Changes in crime rate
Environmental	Water quality and water management	Volume and changes in volume Water treatment, etc.
	Solid waste management Energy conservation	Recycling Reduction in energy usage
Cultural	Maintenance of integrity of local communities	Retention of local cultures and traditions Maintenance of cultural sites Authentic representation of local cultures.

Table 1.2: Key Indicators and associated measures (Agyeiwaah, McKercher and Suntikul 2017 p. 31)

The authors conclude, however, that while economic and environmental indicators can be achieved and measured as absolute metrics, social and cultural indicators are seen as more challenging to measure (Agyeiwaah, McKercher and Suntikul 2017), and therefore often disregarded (Hall 2000). To allow the implementation of these indicators, a meaningful commitment from businesses and communities must be secured (Agyeiwaah, McKercher and Suntikul 2017).

Beyond the attempts of academia to identify suitable indicators of sustainability in tourism, there are various standards and guidelines, published by industry organisations, such as WTO, as well as private certification bodies. UNEP and WTO (2005) provide twenty-nine baseline indicators in addition to a very comprehensive discussion on major sustainability issues and guidelines to address them. It is noted, however, that WTO has identified hundreds of relevant indicators for destinations to consider, and the published twenty-nine are only baseline recommendations, where each destination will choose the relevant indicators according to the local priorities (UNEP and WTO 2005).

Yet, some authors argue that such an extensive list of indicators and choice overload can be detrimental to successful sustainable development (Agyeiwaah,

McKercher and Suntikul 2017). Moreover, other commentators contend that sustainability indicators cannot be 'one size fits all', but local consideration must be taken in choosing the appropriate indicators on a local level. Qiu et al. (2019) propose that by taking into account local perspectives, better evaluation of sustainability can be achieved and thus harmony between environmental, social, cultural and political aspects of sustainable tourism development, despite its increased complexity.

Local perspectives and context-sensitive sustainability are also advocated by Pasgaard et al. (2021 p.15), who argue that sustainable tourism is a "relative and comparative concept, specific to the time, place and type of tourism activity, rather than as a set of general and ideal criteria". Niewiadomski and Mellon (2023 p.6) argue that sustainability transition, especially in the tourism context, will be affected by path-dependent and place-dependent factors, which are "multi-actor, multi-dimensional, purposive, contested". Heikkinen, Rastad Bjørst and Pashkevich (2020) add that expertise and skills, found in local knowledge, are seen as a potential to bridge between global and local, in an aspiration for sustainable development through tourism. Moreover, other authors argue that to develop and achieve sustainability goals, first, it must be established what people care about (Masterson et al. 2017), what value they assign to their place and its development (Grenni, Soini and Horlings 2020), and develop place-based solutions that are aligned with the sense of place and foster stewardship (Chapin and Knapp 2015). Such an approach can meaningfully underpin local tourism development strategies. However, no studies have yet been conducted to propose a framework for local, place-based tourism strategies, most notably in the context of rural cold-water archipelago destinations, as will be discussed in the following chapters.

1.1.3 Strategy for sustainability in tourism

Consequently, to advance sustainability transition, a shared understanding of its meaning must be developed in the destination (Albrecht et al. 2021). Hall (2000 p. 75,89) explains that strategic planning integrates planning and management processes, allowing adaptation to the environment of an organisation by asking "where are we now?", "where do we want to get to?", "how do we get there?" and "how do we know we've got there?". As was observed by Roitershtein

(2022), it is widely agreed that strategic planning is one of the most critical tools for the implementation of sustainability principles in tourism. This is due to the complexity of the sector, the multitude of stakeholders involved and the variety of different views and opinions, that must be considered for successful implementation (Lane 1994; Simpson 2001). Such strategic plans aim to reach an agreement on needs and priorities, provide a basis for considered investments, effectively calculate resources and effort required, as well as identify development opportunities that meet the needs of the destination (Lane 1994). Hall (2000) adds that strategic sustainable tourism planning aims to achieve the conservation of valuable tourism resources, enhance visitor experience, and maximise economic, social and environmental benefits for the local community.

Strategic planning is usually discussed in the context of classic management theories, and includes several elements, as summarised by Simpson (2001) and shown in Figure 1.1.

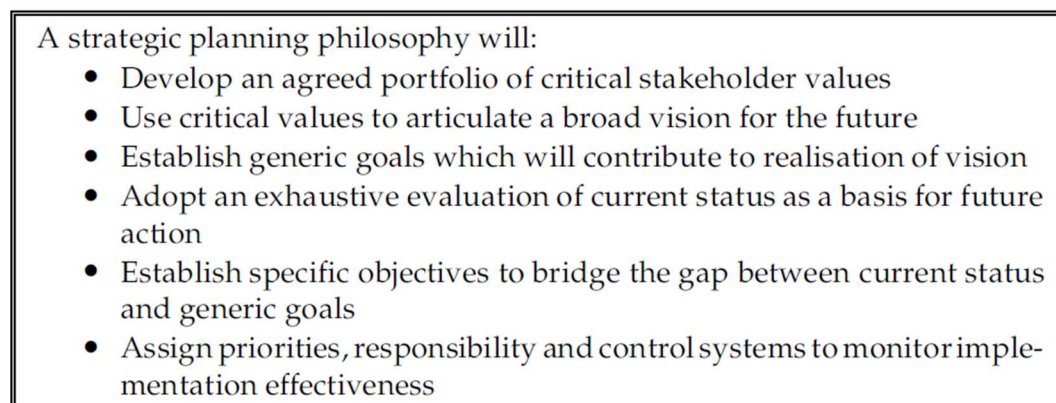


Figure 4 Foundation elements of a strategic planning philosophy (after Steiner, 1979; Kotler *et al.*, 1993; Mintzberg, 1994; Ritchie, 1993; Schermerhorn, 1996; Cooper, 1997)

Figure 1.1: Foundation elements of a strategic planning philosophy (Simpson 2001 p. 13, Figure 4)

These fundamental elements of strategic planning are aligned with sustainability principles mentioned previously, including stakeholder engagement, effective governance, long-term vision, established goals and means to achieve them. If embedded in sustainable tourism strategies, especially on a sub-national level, these elements will ensure greater success in sustainability implementation,

maximising “equitable distribution of tourism benefits in the interests of local, regional and national sustainability” (Simpson 2001 p. 13).

However, Soteriou and Coccossis (2010) argue that integrating sustainability principles into tourism strategies is challenging. The authors found that a weak practical understanding of the sustainability concept, insufficient power of National Tourism Organisations (NTOs) to implement the chosen strategy, resources and limited holistic awareness of tourism integration into wider networks are detrimental to successful strategic planning (Soteriou and Coccossis 2010). Ruhanen (2010) in her literature review found that prioritisation of growth, financial return and overall short-term tactical planning was more prevalent in tourism destinations, rather than long-term strategic planning for sustainable development. Tribe and Paddison (2023), critically reviewed seventeen national strategies and made similar conclusions.

While the global regulatory structure can be seen as an integral part of the sustainability implementation (Hall 2011b), and national tourism strategies can provide an overall framework for sustainable development, it is the local projects and actions that are critical for achieving sustainability goals. As Haid, Albrecht and Finkler (2021) argue, the responsibility to decide on a scale and scope of tourism development lies on the shoulders of local and regional stakeholders and tourism governance, thus deciding on their destination’s sustainable future. Such a local approach to sustainable tourism development must take full account of its contextual position, considering its natural, social, cultural and political characteristics (Renfors 2021). Thus, sustainable tourism development efforts on the local level must begin with establishing an agreement of what sustainability means for the destination and its stakeholders (Albrecht et al. 2021), and what are its sustainability needs, to be able to strategically plan for such development. It requires a place-based approach, driven by an understanding of the people-place relationship and the unique contextual circumstances, pertinent to the place (Horlings 2015; Chapin and Knapp 2015). This place-based approach is underpinned by understanding the sense of place and value of local communities since it is them who hold the local knowledge and attach a meaning to their place (Horlings 2015).

The present doctoral study, therefore, provides an in-depth enquiry into Orkney Islands – a small tourism destination in the north of Scotland. This case offers an opportunity to analyse an interesting and understudied context of a rural cold-water archipelago, uniquely manifested in Orkney, by learning from the members of the Orkney community about their sense of place and their perceptions of tourism value. It provides an insightful account of what Orkney residents think is sustainable for their place and why, and how this knowledge can be used for the evaluation of strategic plans for sustainable tourism development.

1.2 Introducing Orkney

“It is closer to the Arctic Circle than it is to London” (Fraser of Allander Institute 2020)

Orkney Islands is an archipelago of seventy islands, circa twenty of which are inhabited, covering 990 km² of land, and is the smallest local authority area in Scotland (Heddle, Thake and Collinson 2021). It is located around ten miles north of mainland Scotland (Heddle, Thake and Collinson 2021), across Pentland Firth, and can be reached in 40-90 mins by crossing the Firth using NorthLink Ferries, Pentland Ferries or John O’Groats Ferries for foot passengers during summer months. Alternatively, a six-hour journey is available from Aberdeen by NorthLink Ferries (Orkney.com 2024a). The Islands can also be reached by Loganair flights to Kirkwall from the main airports on Scotland's mainland, as well as from Bergen, Norway during summer, and air connection is available between the main islands of the archipelago (Heddle, Thake and Collinson 2021). The map of Orkney is presented in Appendix 1. The proximity of Orkney to Norway has implications not only on transport routes but on the historical connections between the two. Orkney, as well as Shetland, were under Dano-Norwegian rule until the 15th century when it was annexed by Scotland as a result of an unpaid dowry (Crawford 2003). As will be discussed further in 6.3.1, these events influence Orkney’s culture, identity and society to this day, and create a unique context for its tourism development.

1.2.1 The islands

The islands of the Orkney archipelago are divided into four areas: the Mainland, the interlinked South Isles, the South Isles, and the North Isles (Hedde, Thake and Collinson 2021)¹. Appendix 2 presents the map of the Orkney Islands. The Mainland is further divided into East and West, and the smaller 'parishes', with separate community councils, shops and schools (McClanahan 2004). The geological and topographical features of Orkney are very distinct from the neighbouring Shetland and resemble more the North East of Scotland. All islands, apart from Hoy, are characterised by mostly treeless, flat, rolling landscapes, with high sandstone cliffs on the west coast and sandy beaches on the east. Hoy – an island to the south of the Mainland - has prominent hills dominating its landscape, surrounded by some trees and stoney beaches. Figure 1.2 illustrates the landscapes.



*Figure 1.2: View towards the hills of Hoy from Point of Ness, the Mainland. June 2022.
(author)*

¹ Hereafter, terms 'the Mainland' and 'Orkney Mainland' is used to refer to the main island of Orkney, whereas 'mainland' is used to refer to Scottish mainland. Term 'outer isles' will be used to refer to *all* other islands, outwith the Mainland, unless a specific island is discussed.

All islands, apart from the interlinked South Isles, are connected by inter-island ferry, operated by Orkney Ferries – a division of Orkney Islands Council. Local flights are also operating between some islands, such as Sanday, North Ronaldsay and Eday, as well as Westray and Papa Westray – flight between which is claimed to be the shortest flight in the world, lasting only 90 seconds (Loganair 2024). The interlinked islands on the South of the archipelago are connected by causeways, the Churchill Barriers, built during WW2 to protect the British naval fleet (Heddle, Thake and Collinson 2021), situated in Scapa Flow – one of the largest natural harbours in Europe, according to Orkney Harbours (Orkney Harbours 2023). Despite relatively good transport links and relatively short distances between the islands of the Orkney archipelago, Orkney’s connectivity is heavily reliant on weather. Inter-island flight cancellations due to weather conditions are common all year round, and inter-island ferry disruption is an ordinary event during winter months. Furthermore, the old ferry fleet requiring frequent repairs and maintenance, exacerbates the connectivity issues.

1.2.2 Climate

The Orkney climate is affected by its location between the Atlantic Ocean and North Sea, with a cool temperate maritime climate, mild, despite its northerly altitude of 59°N, due to the influence of the Gulf Stream, with mild winters and cool summers (Downes and Gibson 2019). The average annual temperatures are between 5.80°C monthly lowest average and 11.02°C monthly highest average (Met Office 2024). The most prominent feature of the climate is wind, with an average of 25-31mph in winter and 10-16mph in summer months, and often reaches gale force and extreme gale force of over 90mph (Towrie 2024). Rainfall and sea fog (haar) are common throughout the year and the summer days are long (above 18 hours of daylight) and winter days are short (around 6 hours of daylight) (Towrie 2023). The climate of Orkney influences many of the social and cultural aspects of the archipelago (Downes and Gibson 2019), with traditional celebrations, such as Midsummer Solstice, prominence of the agricultural sector (Chalmers 2003), connectivity of communities and tourism.

1.2.3 People

Orkney is home to over 22,500 people (National Records of Scotland 2022), the main island - the Mainland – is where many of them live (circa 75%), mainly in its two largest towns – Kirkwall and Stromness (National Records of Scotland 2015), with Kirkwall also being Orkney’s administrative centre and home to Orkney Islands Council’s main office. Table 1.3 below demonstrates the population figures of the islands of the archipelago, at the time of the 2011 census.

Island	Group	Population
Orkney Mainland	Mainland	17162
South Ronaldsay	South Isles	909
Westray	North Isles	588
Sanday	North Isles	494
Hoy	South Isles	419
Burray	South Isles	409
Stronsay	North Isles	349
Shapinsay	North Isles	307
Rousay	North Isles	216
Eday	North Isles	160
Papa Westray	North Isles	90
Flotta	South Isles	80
North Ronaldsay	North Isles	72
Wyre	North Isles	29
Graemsay	South Isles	28
Egilsay	North Isles	26
Auskerry	North Isles	4
Gairsay	North Isles	3
Holm of Grimbister	North Isles	3
Tresness	North Isles	2
Inner Holm	South Isles	1

Table 1.3: Orkney population by island (National Records of Scotland 2015²).

² The population breakdown data was retrieved from the 2011 census. The data from 2022 census was not yet available at the time of writing.

Similar to many other rural and island areas in Scotland and elsewhere, the Orkney community can be characterised by the prevalence of an older population, albeit the presence of younger people was noted by the participants and the researcher during the field trips. Figure 1.3 demonstrates the overall Orkney population estimate by age group.

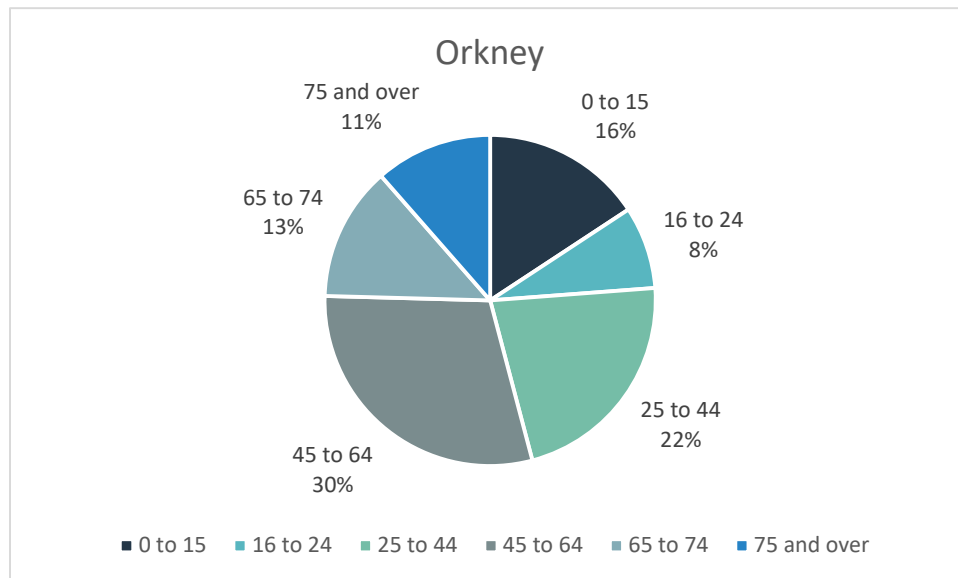


Figure 1.3: Orkney population estimate by age group (compiled by author from National Records of Scotland 2022)

While the above statistics illustrate the situation in Orkney as a whole, it should be remembered that the discussion here centres around Orkney as a rural cold-water *archipelago* (Chapter 2), therefore the differences between its islands should be acknowledged where possible. In this light, the graph in Figure 1.4 below presents available statistics regarding the population age for each island. This data is sourced from the 2011 census and is divided into less detailed age groups (age 16-64 is regarded as one group, compared to the 2021 estimation, presented above). Nonetheless, it can indicate differences between communities, that may be relevant to the subsequent discussions in this thesis.

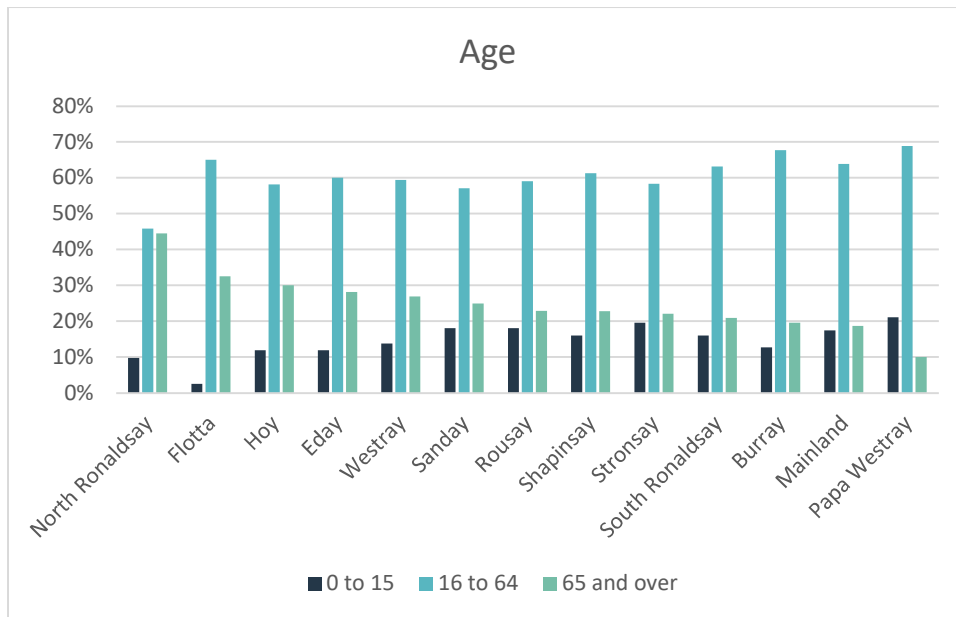


Figure 1.4: Population age in main islands of Orkney archipelago (compiled by author from 2011 census data)

From this chart, it can be observed that while working age population is dominant in all islands, in line with overall Orkney, Scottish isles and Scotland, the percentage of Orkney Islands residents age 65+ is higher than the national figure (at the time of the census it was 17%, figures for 2021 are nearing 20%) in all islands, apart from Papa Westray (10%). Compared to all Scottish islands together, 10 out of 13 islands in Orkney, presented here, are above that figure (17% in 2011). Moreover, in 2021 it was estimated that the overall island population in Scotland aged 65 and over increased by 6%, with similar figures for Orkney, while in Scotland as a whole this increase was estimated at 3% only. Figure 1.5 demonstrates the comparison between 2011 and 2021 for Orkney, all Scottish isles and Scotland overall, by age group.

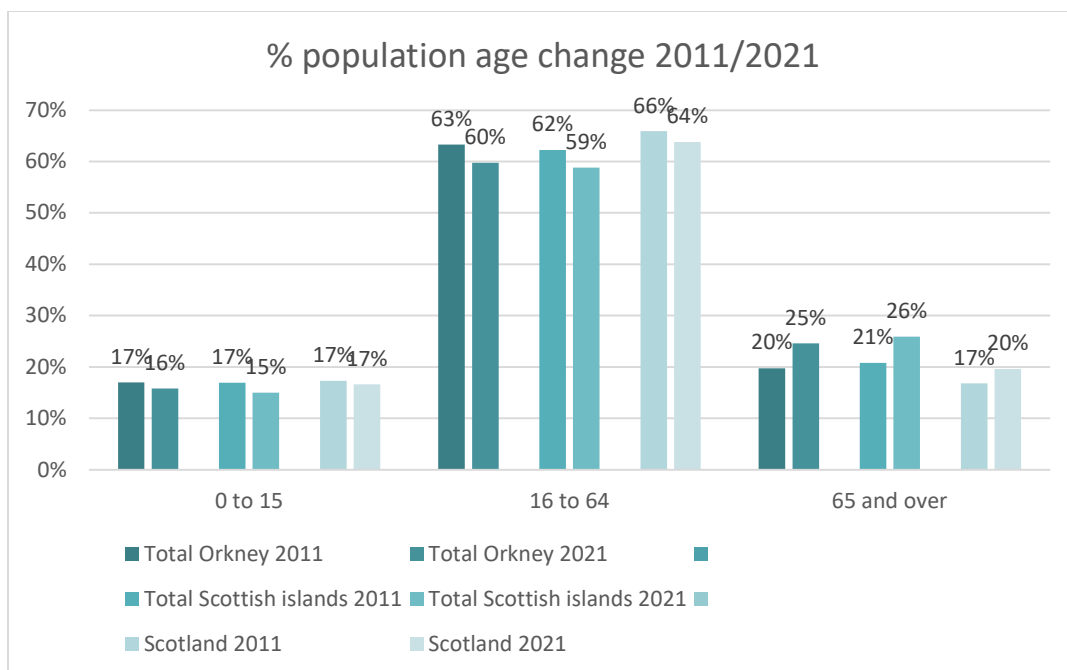


Figure 1.5: Change in age group percentage between 2011 and 2021 in Orkney, Scottish islands and Scotland (compiled by author from 2011 census data and data from National Records of Scotland 2022)

The age data presented above sheds light on an important element of Orkney communities across the archipelago. While examination of sociodemographic attributes of Orkney people was not planned for this study (5.4.1.2), understanding this attribute of the population overall sheds light on many challenges Orkney communities are facing, such as staff shortages (mentioned in 7.2.2), and the impact of tourism development on the sense of place (6.6, 8.2).

1.2.4 Economy

Ranked as Number 1 in Scotland for Quality of Life in 2020, Orkney's economic make-up is notably different from Scotland as a whole, and from other local authorities in the country, including Highland, Eilean Siar and Shetland, highlighting the uniqueness of the region (Fraser of Allander Institute 2020). This manifests in higher reliance on primary industries than in other parts of Scotland, such as fishing, farming and agriculture, with the health and social work sector leading Orkney's economy (Fraser of Allander Institute 2020). A higher level of public sector employment and its overall influence is also recognised and is attributed to the necessity in remote rural areas for the public sector to step in, where the private sector might not have enough scale to

provide sufficient opportunities (Fraser of Allander Institute 2020). Nonetheless, many Orkney residents are engaged in private business, with c.1,500 businesses, employing c. 11,000 jobs (5,000 of which are part-time) operating across the islands (Heddle, Thake and Collinson 2021). Furthermore, a strong leading position in renewable energy creates unique circumstances for Orkney's development. These differences in economic makeup, enhanced by inherent difficulties of remote rural and island communities, such as poor connectivity and access to services, may mean different priorities for Orkney as opposed to Scotland as a whole (Fraser of Allander Institute 2020), therefore dedicated solutions and strategic planning must be developed. This undoubtedly includes strategic planning for sustainable tourism development in Orkney.

1.2.5 Tourism industry

Tourism to the Scottish isles has been a prominent feature over the last two centuries, but unlike the Western Isles, the North Isles – Orkney and Shetland – were rarely visited by leisure tourists, due to their relative inaccessibility (Butler 1997). Until the 1960s, an occasional visitor to Orkney was expected to write to the Kirkwall or Stromness town council, to request arrangements (Gourlay 2003). During that time, Orkney's population experienced a steady decline, due to the gradual weakening of its agriculture sector (Lange 2006), and lack of work opportunities for young people, exacerbated by heavy losses of the male population during the world wars (Butler 1997).

The situation, however, began to improve with the discovery of oil in the North Sea, when Orkney, together with its neighbour Shetland, became hubs for oil and gas facilities, including a large oil terminal on Flotta (Butler 1997). This allowed to accumulate significant income to stabilise the population in Orkney, as well as support traditional industries and communities. These developments also included significant improvements in sea, air and road transport connectivity, which made a big impact on tourism development to the islands (Butler 1997). Improvement in accommodation offer was also substantial, due to the need to accommodate the oil sector workforce, as well as improvement of other services, such as car rental. These changes put Orkney (and Shetland) in a much better position for tourism, not only compared to the pre-oil era but also compared to other areas in Scotland and its islands (Butler 1997). In addition to

these changes, as evident in many other rural areas (Chapter 2), agricultural restructuring meant that traditional industries had to be reimagined. While agriculture remains one of the most significant industries in Orkney to this day (Lange 2006; Fraser of Allander Institute 2020), its produce transitioned from 'quantity' to 'quality' (Chapter 7), becoming an addition to Orkney's tourism, which has been the fastest growing industry in the archipelago (Lange 2006).

Indeed, despite that Baldacchino (2006b) notes that residents of cold-water islands are not necessarily interested in tourism, and their involvement in the industry is low compared to warm-water islands, the tourism industry in Orkney is one of the major economic activities, alongside fishing, farming, agriculture, and public administration and healthcare services (Highlands and Islands Enterprise 2019). The visitor economy in Orkney is recognised as a significant contributor to the economy of the islands, with an estimated £67M annual worth (Fraser of Allander Institute 2020; Progressive 2020). The industry touches many different sectors, such as accommodation, food and transport, as well as retail and manufacturing, in both private and public sectors, and all tourism-related activities represent 10% of overall employment, compared to 8.3% in Scotland (Fraser of Allander Institute 2020). Orkney tourism industry experienced consistent growth over the last two decades, preceding the COVID-19 pandemic (Destination Orkney Partnership 2020). According to the latest visitor survey, providing data on independent visitors for 2019, there were 192,173 independent visits to the islands, which is an increase of 10.3% from 2017. An increase was also noted in the £350.60 total average spend per person, resulting in an addition of 34% to the total annual value of the sector, compared to 2017³ (Progressive 2020).

The economic position of Orkney is not the only unique feature of the destination. Remarkable history, spectacular landscapes and a welcoming community are the main pull factors to visit Orkney (Progressive 2020). The unique geographical location of the archipelago, between the Atlantic and North Sea, and longstanding farming and agricultural way of life, created distinctive

³ Other sources of statistical data for the sector show different numbers, such as value of the sector in 2017 was valued at £50M according to VisitScotland visitor survey, and £77.5M in 2017 according to STEAM Trend Report by Global Tourism Solutions.

landscapes that provide home to an exceptional variety of birds, sea stacks and vast beaches. These landscapes attract visitors to drive, cycle and walk across the islands. Orkney is also home to heritage sites of global importance – from the Neolithic era to 20th-century military history, enriched by the abundant folklore and storytelling culture (Ironsides and Massie 2020).

At the heart of the islands lies the Heart of Neolithic Orkney – a group of designated UNESCO World Heritage sites, located on the Mainland. With two stone circles, a chambered cairn, the remarkably preserved village of Skara Brae and the active archaeological site Ness of Brodgar – these 5000-year-old sites fascinate archaeologists and visitors alike. Other places, dating back to the Neolithic, Bronze and Viking ages, are scattered in unprecedented quantities across all islands of the archipelago, creating an exclusive historical environment, that to this day shapes the character and culture of Orkney and its communities, and provides a rare opportunity for visitors to deeply engage with it. However, the sites are vulnerable to physical impacts, such as coastal erosion and visitor footfall (UNESCO 1999). Protection and conservation of this environment is challenging, but undoubtedly necessary to preserve these heritage treasures for future generations of locals and visitors (Taylor Nisbet Ltd. 2020).

Challenges in protecting the natural and historical environment are proportionate to its importance. Carrying capacity problems in the main historical and natural sites on the Mainland are recognised, causing negative environmental impact, peaking in July-August (Destination Orkney Partnership 2020; Staiano, Weaver and Ferguson 2020). Further environmental impact is caused by transport to, in and in-between the islands, where carbon-emitting modes of transport are prevalent – cars and other private vehicles, ferries and cruise ships. Public transport in Orkney is carbon-emitting as well. Like many other destinations in Scotland, additional carrying capacity challenges are recognised in uncontrolled parking areas (Taylor Nisbet Ltd. 2020). Other infrastructure and facilities challenges are recognised as well, such as narrow roads (Staiano, Weaver and Ferguson 2020), limited toilet facilities in some areas, and insufficient vehicle capacity on inter-island ferries and their reliability (Amery 2021; Destination Orkney Partnership 2020).

However, the major feature of the Orkney tourism industry, contributing to the challenges noted above, is cruise tourism, with Orkney being the most popular cruise destination in the UK (Orkney Harbour Authority 2023b). With over 200 ships, carrying over 260,000 passengers during the 2023 season (Orkney Harbour Authority 2023a), this branch of tourism is the most controversial aspect of the industry on the islands, creating another unique challenge for Orkney's community (Orkney Islands Council 2021b; Taylor Nisbet Ltd. 2020; The Orkney News 2021b; Kalandides 2017; The Herald 2017; Brocklehurst 2017). The environmental impact of cruise tourism is a major concern globally (Brida and Zapata 2010; Carić and Mackelworth 2014; Hovelsrud et al. 2021). Yet, it is the onshore operations that trigger major debates across the community in Orkney. The nature of cruise tourism operations means that their time on Orkney's shore is very limited (Cruise operator Princess Cruises offers 2-7 hours tours, Princess Cruises (2022)) and that only the most popular attractions will be visited in that time, such as Skara Brae and St Magnus Cathedral in Kirkwall. Thus, the environmental and social impacts of large numbers of visitors entering the same sites in a short time are significant, also affecting visitor experience and the lives of local communities (Destination Orkney Partnership 2020). Therefore, the scale and management of cruise tourism in Orkney are highly debated within the local community, posing exceptional challenges for the tourism sector and sustainable development of the islands.

1.2.6 Orkney Tourism Strategy

To address the challenges and maximise the benefits of tourism development, Orkney Tourism Strategy 2025⁴ was developed with the vision; "By 2025, Orkney will be a world-class sustainable destination enriching the lives of its people and visitors" (Destination Orkney Partnership 2020, p.5). This Strategy was launched in February 2020 and its cycle was planned to complete in 2025. However, in March 2020, the COVID-19 pandemic was declared, which introduced unprecedented challenges and put on hold the implementation of the strategy. Following the pandemic, the strategy was reviewed and in August 2022

⁴ 'the Strategy' hereafter.

its updated version was launched – Orkney Tourism Strategy 2020-2030, with the vision “By 2030, Orkney will be a world-class sustainable destination enriching the lives of its people and visitors” (Destination Orkney Partnership 2022a, p.5).

The objectives of the revised Strategy are presented in Figure 1.6 below.

The objectives of the strategy are:

- Grow the prosperity of the islands through responsible tourism
- Responsibly manage visitor numbers to protect sites and improve the quality of experience for visitors and residents
- Develop the tourism resource and infrastructure that meets current and future demand
- All communities benefit from tourism and visitors enjoy a broader experience
- Mitigate climate change impacts of and on tourism

Figure 1.6: Strategy objectives (Destination Orkney Partnership 2022a, p.5)

In addition to the objectives above, the new strategy introduces the overarching principles, that must guide all tourism development activities:

- (a) a ‘cross-islands’ approach should be adopted;
- (b) all tourism development is underpinned by sustainability considerations, including climate action, assessment of environmental impacts, social inclusion, and natural and cultural heritage preservation;
- (c) all decisions will be evidence-based and informed by community and stakeholder engagement.

(Destination Orkney Partnership 2022a, p.5)

From here, the updated strategy document is identical to its previous version (Destination Orkney Partnership 2020), apart from reference to the COVID-19 pandemic challenges. The Strategy document details the benefits of the tourism industry in Orkney, emphasising its impact on employment, and cultural and community enrichment by sustaining festivals, food and drink and local arts and crafts. It also notes the enhanced employment opportunities for young people, infrastructure development to use by visitors and locals alike, and enhancement

of Orkney's 'brand', which showcases Orkney as a destination to visit, live, work, study, invest in and buy from (Destination Orkney Partnership 2022a).

Presenting the benefits, the Strategy also recognises the impact of growing visitor numbers to Orkney, and challenges such as seasonality, infrastructure, digital connectivity and skills, and employment, as well as the need to ensure economic, social, cultural and environmental sustainability of the industry and Orkney as a destination. It also recognises the importance of meeting the needs of local communities and visitors, seeking the "shared value" - where the competitiveness of tourism and the health of the communities around it are mutually dependent" (Destination Orkney Partnership 2022a, p.6). The Strategy emphasises the need for strong management, monitoring and investment in tourism to ensure sustainable development. The Strategy also states the main statistical data for the sector (correct as of 2017) and trends and acknowledges the challenges, posed by growing numbers of visitors, particularly day visitors (8.1). It confirms that a balance will be sought between the number of visitors and their contribution to the sustainability of the industry and the destination.

Since this is an overarching document, introducing the strategic direction of Orkney as a destination, the document also underpins the development of Destination Management and Destination Marketing plans, listing the main points these plans will include once released. At the time of writing, the Destination Management Plan (also known as the Action Plan) is not yet available and is being reviewed against the goals and resources of organisations on the Destination Orkney Partnership (DOP), before any commitments for its implementation can be made. These organisations and their remit of responsibilities are summarised in Table 1.4 below⁵ and further discussed in 6.5.1.2.

⁵ NatureScot were member until 2022.

Organisation	Description	Role in DOP
Destination Orkney Limited (DO)	Local membership organisation of all tourism related businesses in Orkney	Offers membership and wider services to the industry including promotional opportunities, support for Orkney tourism initiatives in collaboration with partners, and representation of the tourism industry on several forums including transport, the environment, culture and heritage/archaeology.
Highlands and Islands Enterprise (HIE)	Economic and community development government agency for the Highlands and Islands region of Scotland.	Funding of DO, marketing activities, funding of private and community initiatives. Locally represented.
Historic Environment Scotland (HES)	The lead public body set up to investigate, care for and promote Scotland's historic environment	Manages the World Heritage Site and other archaeological and heritage sites across Orkney Islands. Locally represented.
Orkney Islands Council (OIC)	Local authority of Orkney Islands	Infrastructure management, development and maintenance, planning authority, funding distribution.
VisitScotland (VS)	National Tourism Organisation and government agency, responsible for marketing, research, funding and visitor information for all of Scotland	Represented locally, VS is responsible for promotion and marketing, visitor information, signage, and funding distribution.

Table 1.4: Overview of organisations in Destination Orkney Partnership

Despite the lack of a detailed action plan to implement the Strategy, and therefore advance the sustainability transition (Niewiadomski and Mellon 2023), it is recognised that Orkney has already made some significant steps towards sustainable tourism development to address the challenges, discussed in 1.2.6. These include car parking at Ring of Brodgar and Stones of Stennes, visitor resources at St Magnus Cathedral to manage visitors' flow, site management practices at Skara Brae and introduction of booking and charge at the Italian Chapel (Staiano, Weaver and Ferguson 2020). Additional developments are

being made utilising the Scottish Government's Rural Tourism Infrastructure Fund (RTIF) (Orkney Islands Council 2021c), and funding from HIE for the destination's post-COVID tourism recovery (Orkney Islands Council 2021e). Strategic Tourism Development Infrastructure Plan (7.1.2.2) is also being developed using a subsequent grant from VisitScotland's RTIF (Orkney Islands Council 2021c).

Yet, it is argued that although some activities are taking place, and the strategy document *is* published, there is a general lack of strategic planning for destination management, and cruise management in particular, and if there are plans - they are not being sufficiently actioned yet (Staiano, Weaver and Ferguson 2020). It is also argued that engagement of the wider community regarding tourism development and management is insufficient, and more emphasis on communication and education opportunities is needed to ensure sustainable development (Taylor Nisbet Ltd. 2020). To enable such sustainable development, Orkney must actively engage in strategic planning and develop a long-term strategic direction aimed at economic, social, cultural and environmental sustainability, working in partnership between the public sector, industry and Orkney's wider community to implement these plans.

1.3 Research questions

From the introduction above, two main problems were identified in strategic planning for sustainable tourism development on a local level, not sufficiently addressed by the extant literature, as will be discussed in more detail in Chapters 2-4. These problems, identified below as (a) and (b), provide a rationale for conducting this study, forming the research questions, aim and objectives:

(a) tourism and sustainability are seen as highly context-dependent, and their manifestation will be varied between destinations. The importance of this understanding is twofold. First, this emphasises the need to study the local *context* to ascertain how it affects the understanding of sustainability for a particular tourism destination. Second, studying these contextual circumstances, and therefore *place-based* sustainability needs, can be more meaningful if it is underpinned by understanding the sense of place of local communities, what

value they assign to tourism development in their place, and what sustainability means for them. Thus, the first research question, derived from this argument (a), is:

(RQ1) How and why do local contextual circumstances affect the Orkney-specific definition of sustainability in a tourism context?

(b) strategies for sustainable tourism development are instrumental in the effort to transition to sustainable futures. Yet, some strategies are critiqued for prioritising economic benefits and neglecting the wider sustainability needs of *people* and *places*, affected by the tourism industry. Therefore, strategy evaluation can be a tool to recognise any potential problems in strategic direction and provide a tool for updating existing strategies and for the development of new sustainable tourism strategies. However, given the importance of context and place-specific sustainability needs, it can be argued that existing strategy evaluation frameworks cannot apply to local strategy evaluation. This is because they will not be able to recognise those *place-based* needs and meaningfully direct the strategy users towards sustainable tourism development. A place-based strategy evaluation framework is therefore required, that will be underpinned by the voices of local communities and consider the complexity of localised sustainable tourism development. Thus, the research questions derived from this argument (b) are:

(RQ2) How can understanding place-based sustainability underpin a local tourism strategy evaluation tool?

(RQ3) Can such a place-based strategy evaluation tool determine the strategy's suitability for sustainable tourism development in the destination?

1.4 Research aim and objectives

Therefore, using Orkney Islands as a case study (5.2.2), this research aimed to:

(1) propose a method for understanding the local contextual circumstances and their effect on tourism-related sustainability needs; (2) propose a place-based strategy evaluation framework, that can recognise whether tourism strategy addresses these context-specific sustainability needs of a local destination.

To achieve its aim, this study will meet the following objectives:

(OBJ1) to understand the contextual features of Orkney, that affect its sustainability needs, expressed by Orkney residents.

(OBJ2) to understand residents' attitudes towards tourism development in Orkney and their perceptions of tourism value, based on their definition of sustainability in a tourism context.

(OBJ3) to use the contextual knowledge and understanding of Orkney to devise a place-based strategy evaluation framework, that will enable recognising whether the strategy addresses the context-dependent sustainability needs.

(OBJ4) to evaluate the Orkney Tourism Strategy 2020-2030, using the newly developed framework, as a case study of its application.

(OBJ5) to propose practical applications for the place-based strategy evaluation framework to other contexts, that can be used to evaluate existing strategies and to guide destinations in developing new strategies.

The relationship between the research questions, research aim and its objectives are presented in Table 1.5 below:

Problem	Research Questions	Aim	Objectives
(a)	(RQ1)	(1)	(OBJ1), (OBJ2)
(b)	(RQ2)	(2)	(OBJ3)
	(RQ3)	(2)	(OBJ4), (OBJ5)

Table 1.5: Relationship between research problems, questions, aim and objectives

By achieving its aim and objectives, this study not only provides a practical contribution to Orkney but also contributes to the academic fields of strategic planning and sustainable tourism, by addressing the gap in context-specific place-based strategy evaluation. The full contribution to knowledge and practice will be discussed in Chapter 10.

1.5 Thesis structure

The structure of the thesis follows a thematic narrative. The next three chapters will include literature on themes, pertinent to this study. The review begins with an analysis of the applicable contexts, relevant to Orkney – rural, islands,

archipelagos, and cold-water – forming the Layers of Context (LoC) model (Chapter 2). This will provide an understanding of common 'base' layers of context, with the 'unique' layer of Orkney Islands being empirically explored in the analytical chapters. The literature review will then look at theories of stakeholders, governance and power (Chapter 3), as integral parts of strategic planning for sustainable tourism development. Existing strategy evaluation frameworks will also be reviewed in this chapter, to provide a useful starting point for this enquiry. Lastly, the literature will look at place and social exchange theories (Chapter 4), to conceptualise the relationship between people and place, as a foundation for understanding the unique contextual circumstances.

Chapter 5 will then discuss in detail the philosophical and methodological approaches in this study. Analytical chapters will then follow, organised thematically, with results and their discussion presented in a single narrative. The thematic analysis begins with examining the interaction between people and place in Orkney (Chapter 6), to begin understanding how and why it underpins the local meaning of sustainability. Then placemaking in Orkney and the attitudes of members of the Orkney community towards it are analysed (Chapter 7), to deepen the understanding of the local meaning of sustainability. This is followed by the discussion on tourism value, as perceived by Orkney people (Chapter 8), which then becomes a focal point of the strategy evaluation framework.

Next, Chapter 9 will present the Orkney Strategy Evaluation Framework, based on the thematic analysis in the preceding chapters. The framework is then applied to Orkney Tourism Strategy 2020-2030, and conclusions of this evaluation are offered. Following this evaluation, the wider application of this framework is discussed, as a useful tool for place-based sustainability strategy evaluation and development, providing a practical manual for its application in other contexts. This work concludes with a discussion of the findings and outcomes of this study in relation to the existing literature (Chapter 10), detailing the contribution of this study to theory and practice. Any applicable limitations and suggestions for further research are also discussed.

CHAPTER 2

Layers of Context

This chapter introduces the contextual layers, applicable to the Orkney Islands, which include rural, islands, archipelagos and cold-water islands. The layers are discussed from a general, conceptual point of view, including some historical and geographical prerequisites. These themes, introduced in turn, can be seen as layers of context for this research, with Orkney affected by these layers, while maintaining its own, specific set of characteristics that affect its sustainable tourism development. Thus, the layers that can be common with other destinations (rural, islands, archipelagos, cold-water), are labelled as 'base' layers, whereas the layer that can reveal their manifestation specifically in Orkney and illuminate Orkney's unique circumstances, is labelled as 'unique' layer. Figure 2.1 below illustrates this approach.

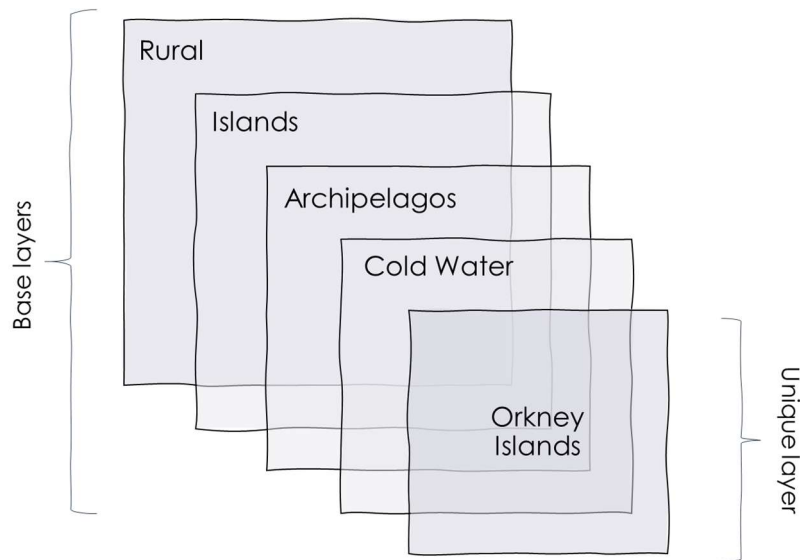


Figure 2.1: Layers of Context (LoC) (author)

The following sections of this chapter will discuss these layers, except the last layer of Orkney, the analysis of which is the first objective of this study (1.4).

2.1 Defining rurality

The importance of defining and measuring rurality is recognised amongst researchers and policymakers and influences subjects regarding the economic and social sustainability of communities in these rural settings (Nelson et al. 2021). The term 'rural' has developed a variety of directions, from spatial and practical to social and cultural, revealing trends and debates on the 'idyllic' nature of the rural (Peng et al. 2018). The definition and interpretation of rurality have become even more significant with the changes that rural spaces are undergoing, such as agricultural restructuring, diversification, digitalisation and population changes from significant de-population (Nelson et al. 2021) to recent counter-urbanisation in certain areas, as a result of which rural can no longer be defined simply as an opposite of urban (Panzer-Krause 2020). As noted by Aquilino, Harris and Wise (2021 p. 138), "rurality can be understood as a collective connection whereby people share social and cultural constructions founded in place and community traditions".

Nonetheless, as recognised by Frochot (2005), the majority of existing definitions are quite broad and generic and constitute mainly aspects of 'non-

urban', 'countryside' and population density criteria. Panzer-Krause (2020 p. 2), on the other hand, explores the subject further and discusses a three-fold model of rurality, based on Halfacree (2007), presented in Figure 2.2 below – “rural localities” (physical space), “formal representation of the rural” (formal context, stakeholders’ representation) and “everyday lives of the rural” (daily routines of the residents).

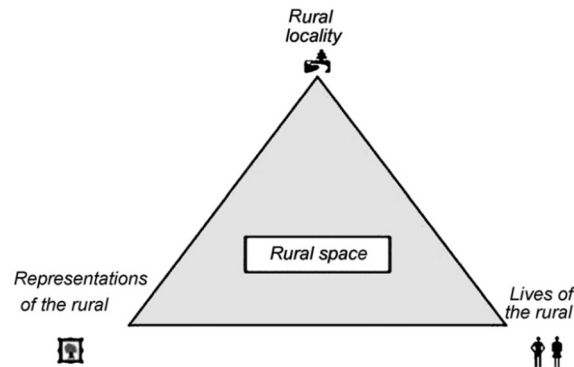


Figure 2.2: A general model of rural space (Halfacree 2007 p. 127)

The author compares this model to the one produced by Frisvoll (2012), presented in Figure 2.3, which introduces an additional element - power, present in all immaterial (laws and regulations), material (property and money) and personal (family, career, vulnerabilities) elements of the rural universe (Panzer-Krause 2020).

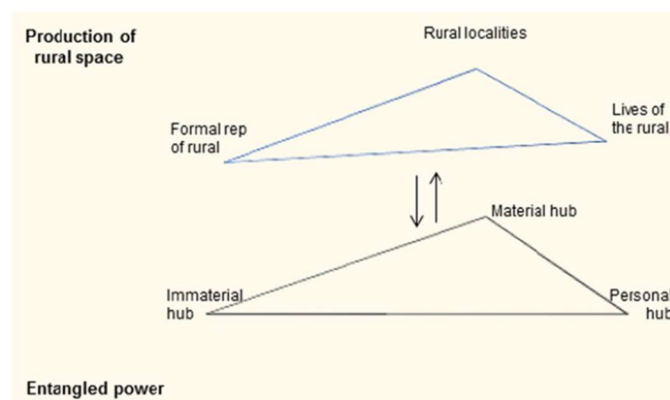


Figure 2.3: A conceptual model for untangling power in the production of space (Frisvoll 2012 p. 449)

Both models present the subject of rurality based on Henri Lefebvre's 'production of space' concept and engage deeply with the social production of rural space in different dimensions of rurality (Halfacree 2007; Frisvoll 2012). These authors recognise the complexity of rural spatial and social entanglements and explore the 'trial by space' principle within an element of spatial 'coherence', which is determined according to "the extent to which rural residents, policymakers, business interests, pressure groups, etc. are 'singing from the same hymn sheet'" (Halfacree 2007 p. 128). However, Frisvoll's expansion of the model, adding the element of power in immaterial, material and personal perspectives, introduces a more adequate tool for analysing rural production of space, where understanding of actors in a specific rural space and situation is required.

Based on these approaches to defining rurality, it can be agreed that the concept of rurality and rural development is a complex, nuanced and heterogeneous subject, encompassing the lives and livelihoods of communities and individuals, affected by policies and decisions based on these definitions. As Ploeg and Marsden (2008 p. vii) explain, rural development is driven by the *rural web*, which is a "complex set of internally and externally generated interrelationships that shape the relative attractiveness of rural spaces, economically, socially, culturally and environmentally". Similarly, Horlings and Kanemasu (2015) note the complexity and heterogeneity of rural places globally and use in-depth empirical research of a single case study to understand and analyse these complexities. Heley and Jones (2012) add that rural is a "multi-authored and multi-faceted space", where the inter-complexities of local and global is manifested in place-specific and contested ways.

It is not enough, however, to simply define rurality, risking implying that the nature of the concept and the being rural in itself is static and unchanging. The next section will explore the changes and challenges rural areas have been experiencing. Although rural restructuring and its causes and effects are not the main subject of this study, it is important to understand the contextual weight of these processes, which will allow an assessment of their applicability to the studied destination later in the thesis.

2.1.1 Rural changes

“Seen through a car window, or a TV screen, it is easy to see rural areas as idyllic and changeless. Many of us carry a picture of an imagined countryside where farming families till the same land as their forebears, where everyone knows and supports one another in ‘communities’, where life is slower and somehow better.” (Shucksmith 2000 p. 6)

Such a romanticised idea of the British countryside can be seen as one of the compounds of the popularity of rural tourism, however, a different reality is often hidden behind these visually idyllic pictures (Shucksmith 2000). Rural regions, in the UK and beyond, are facing inevitable changes and it is widely agreed that rural areas are transitioning from being a place of production to a place of consumption (Ploeg and Marsden 2008; Mcareavey and McDonagh 2011), turning to diversification of economy, from predominantly agricultural, to other sources of income (Potter and Lobley 2004). Such transition is often referred to as post-Fordism and neoliberalism, characterised by “more information-intensive, service-based economies, and governmental policies that emphasize free trade and less regulation”, often accompanied by more disposable income and increase in leisure time, underpinning the rise in services supply and consumption-led economy (van Auken and Rye 2011 p. 66). Drawing on Veblen ([1899] 2007), it can be argued that with these changes, conspicuous consumption has expanded to a wider social structure, blurring the traditional divides between the leisure and working classes. Post-rural restructuring, in addition, rural economy and landscapes have changed from homogeneous and predictable, to dynamic, complex and heterogeneous (van Auken and Rye 2011; Wu and Gallent 2021).

This restructuring in many countries was brought about by a decline in primary production sectors (Scott, Christie and Midmore 2004; Boyne 2017), depopulation (Winther 2017), infrastructure problems and degradation of the natural environment (Mcareavey and McDonagh 2011). The subject, therefore, is widely explored in various countries, such as China (Long et al. 2016; Qian, Wang and Zheng 2016; Peng et al. 2018), Europe (Potter and Lobley 2004; Halfacree, Kovách and Woodward 2017; Hall, Roberts and Mitchell 2017b; Farinella and Nori 2020) and the USA (Kandel and Brown 2006). Many authors

agree that agricultural restructuring caused by technological advancements, commercialisation, globalisation and the development of large production units underpinned by economies of scale, has brought the inevitable separation of agriculture from small-scale family farms (Potter and Lobley 2004). In certain sectors, the utilisation of technology brought the ability to increase supply, while the demand remained unchanged (Shucksmith 2000). This, together with other reasons, such as price and subsidy fluctuations due to policy changes, outbreaks of livestock diseases and costs of animal welfare compliance, climate change consequences and changes in diet trends have caused a significant decline in traditional industries in rural areas (Angus et al. 2009).

As a part of these processes, the tourism industry has been used as one of the tools to regenerate and develop rural areas, bringing economic benefits, as well as cultural and environmental conservation opportunities to regions that might have otherwise faced a dramatic economic decline (Mcareavey and Mcdonagh 2011; Boyne 2017; Panzer-Krause 2020). After all, to allow for rural to exist, it must be developed, revitalised and strengthened in the face of challenges that affect the co-evolution of these rural spaces, by creating value and attractiveness and positioning the rural within wider society (Ploeg and Marsden 2008).

The restructuring of the economy, geography and demography has led to social and compositional changes in rural communities. Urban populations migrating to rural areas bring with them some inherently urban economic activities, as well as political and social influence on rural areas (Brown 2012). In addition, external actors are now introduced to the restructuring areas, such as second homeowners and tourists (van Auken and Rye 2011). These processes of gentrification and housing market changes in some areas, such as European uplands, are often accompanied by a lack of property regulations, shaping the development outcomes in these areas (Shucksmith and Rønningen 2011). Other new developments in modern countryside gain traction, with renewable energy coming to the forefront of governments to fulfil ambitious net-zero targets. This, in turn, means that rural areas become central to these ambitions, due to the large open spaces that are often required for such developments (Prince et al. 2023). While some regard these changes as symbols of 'sustainable

development' (Peake 2018), others see them as a threat to their perception of rural places and landscapes (Plieninger et al. 2018; Hateftabar and Hall 2023).

As a consequence of these changes, feelings of nostalgia became more prominent, and the longing towards that golden age of the 'good old days' (Kastenholz et al. 2012), came to the forefront of many minds. As a predominantly Western concept, that exists to help frame discussions on the new rural normal (Peng et al. 2018), 'rurality' often includes deliberations about the *rural idyll* and its implications on the economic and demographic changes discussed above. It is argued that in the modern, post-productivist era, rural life is often perceived as idyllic, free, authentic and wholesome, especially by urban dwellers (Shucksmith 2018; Panzer-Krause 2020). Romanticising the countryside can be seen as one of the pull factors for rural tourism, where natural and cultural properties of rural areas became their main attraction (Panzer-Krause 2020). Marketing efforts have been increased to attract visitors to rural places, promising reconnection with nature, culture, heritage and authentic experiences of local arts, crafts and food. Such processes created obvious hotspots of rural attractions, surrounded by areas that had little to no benefits from the tourism development (Panzer-Krause 2020). More will be explored on rural tourism in section 2.3.

The discourse on the rural *idyll*, infused by romanticised attitudes towards how rural places and rural life *should* look like, based on an elusive prerequisite of an unspecified past, claiming authenticity and attempting to set direction for the desirable future, often obscures the real picture of the rural (Peng et al. 2018; Shucksmith 2018). These idyllic ideas that pull visitors and new inhabitants to rural spaces, may diminish the issues that rural communities and places are facing, inadvertently hindering the process of fixing these issues and stagnating the sustainability transition.

2.2 Defining islandness

Arguably, such a romanticised picture and the challenges hiding behind it can be experienced more explicitly in rural island locations. In the island context, the high contextuality of the 'rural' and the complexity of its systems is aggravated by physical separation from the mainland, creating additional sustainability

needs. To understand the weight of *islandness* in the current study of Orkney, it is important to explore what is meant by it.

2.2.1 Islands

“Ask anyone to take a sheet of paper and to draw an island as seen from the air. Most likely, that person would draw a stylized image of a piece of land, without much detail other than being surrounded by water. It would fit within the space confines of the sheet. It would also, uncannily, have an approximately circular shape.” (Baldacchino 2005 p. 247).

Baldacchino (2005), reflecting on this simple fact, argues that islands cannot be fit into a single page, nor can they conform to a specific shape, size and everything that comes with it, and that attempts to confide islands into a metaphorical square sheet of paper may be driven by the willingness to control, manage, and manipulate. Indeed Hall (2012) suggests that researching tourism phenomena on islands is a great opportunity to utilise their confined location and systems, imposed by sea boundaries. The seemingly *insulated* nature of these destinations can act as “a ‘natural laboratory’ for the observation and study of tourism's impacts and the effects of mobile, often seasonal, human populations on permanent settlements, culture and the natural environment” (Hall 2010 p.246; Sharpley 2012). However, Baldacchino (2004) warns that such an approach can be dangerous, due to the uniqueness of every island, and that trying to generalise island processes onto mainland ones (as one would do in laboratory conditions) is futile.

Nonetheless, despite clear unique characteristics, there are attributes of island life, imposed by the unescapable sea boundaries, that are shared between inhabitants of many islands and archipelagos, cutting across time, space and cultures (Conkling 2007). Such attributes are often described quite poetically, or merely pragmatically, reflecting the beautiful but difficult, mystical but ‘down-to-earth’, isolated and yet connected life on islands, and how island communities experience these attributes in their daily life, consciously and subconsciously. In his “On Islanders and Islandness”, Conkling (2007) touches on many attributes of islandness, including dependence on natural processes, such as weather and seasons, loyalty and trust in fellow community members, hard work, vulnerability and resilience (also Campbell 2009; Hall 2012), common sense and

tolerance, tradition and honour. Baldacchino (2015b) also notes that the fact that there *is* a 'mainland' as a reference point, often creates distinctive ethno-cultural characteristics in island communities, including language, food, cultural elements and behaviours. Islandness can create this strong sense of community and belongingness, that preposition *in* is often used in relation to islands and their communities, rather than *on* a physical piece of land (Ronström 2011).

These shared attributes are what form the meaning of islandness, embedded in island-born residents, incomers or those who left islands long ago, and their way of looking at the world (Conkling 2007). Although the defining attributes of islandness begin with the geographically insular nature of islands, Baldacchino (2004) argues that the word *islandness* should be used instead of *insularity*, to avoid its negative connotation and give justice to the uniqueness and complexity of the island systems and lives, and their interactions with the world that surrounds them. Importantly, Grydehøj (2017 p. 8) points out:

"it is self-evidently problematic to study a particular island on what we believe to be its own terms and then to apply these - in an epic feat of deduction - to the wider state of 'islandness', without reference to the terms of other islands or to the geographical and symbolic units that interact with them."

And since the unit of this study is an archipelago of Orkney Islands, it is useful to investigate the meaning and importance of this idea.

2.2.2 Archipelagos

When it comes to understanding archipelagos, the matter becomes even more complex. Karampela, Kizos and Papatheodorou (2015 p.35) define archipelago as "a cluster of islands in a common area of water", and a word that is derived from Greek, meaning "first sea"⁶. Yet, archipelagos are more than mere clusters of islands. Stratford et al. (2011 p. 114) call to understand archipelagos by asking:

⁶ "*archon* (leader/first) and *pelagos* (sea)" (Karampela, Kizos and Papatheodorou 2015 p.35)

“how those who inhabit them or contemplate their spatialities and topological forms might view, represent, talk and write about, or otherwise experience disjuncture, connection and entanglement between and among islands”.

Thus, power balance and centre–periphery relationships must be reconsidered and looked at in this new light, defining relations among and between the islands of an archipelago (Stratford et al. 2011; Favole and Giordana 2018; Pugh 2018). For example, in some archipelago contexts, the *mainland* will refer to the main island where local administration is located, as opposed to the mainland of the governing national authority (Baldacchino 2004). In turn, the national authority mainland, in not self-governing archipelagos, such as Orkney and Shetland in Scotland, adds another layer of complexity to the already entangled power dynamics, exacerbated by further political construction of the state (Bardolet and Sheldon 2008; Favole and Giordana 2018). This “multiple peripherality” (Spilanis, Kizos and Petsioti 2012 p. 202) in archipelagos, often causes a decline in many vital systems in the most peripheral islands, and excessive strain on the limited systems of the core island (Baldacchino 2015b). As the author points out,

“...an island may feel at the wrong end of the stick in relation to a bigger island; and yet push its weight around in relation to even smaller neighbours. This relativity can extend up or down multiple scales.” (Baldacchino 2015b p. 10).

Therefore, there is a call in island studies for the archipelago context to be more prominent, and even preferable to the island-continent context, to minimise the emphasis on a somewhat colonial perspective of the centre-periphery relationship and give justice to the complexity of the relationship between the islands themselves (Stratford et al. 2011; Favole and Giordana 2018). These calls suggest rethinking the status quo of a static island as a piece of land surrounded by the sea and start thinking of islands in relational terms, as integral parts of an overall system of islands, seas, continents and ever-evolving relationships between them (Pugh 2018). After all, “we often say island, but we really mean archipelago”, as with only a few exceptions, most of the islands are comprised of many pieces of land (Baldacchino 2021 p. 503). As the starting point of islandness, geography plays the main part in these relationships, where

sea and land connectivity are seen as a factor in the way of how islandness is perceived by its inhabitants (Grydehøj and Casagrande 2020).

Relationships between island and mainland, but mainly island and island within an archipelago are seen as a significant construct of this thesis. Although it is clear, in theory, that such archipelagic relationships do take place in an island setting, it is important to keep in mind that their manifestation cannot be assumed upfront (Stratford et al. 2011). Therefore, as previously discussed, it remains to be seen how these relationships manifest in the Orkney archipelago.

2.3 Tourism through the layers of context

The subject of the tourism industry plays a significant role in rural restructuring and development (2.1.1), thus, unsurprisingly, tourism is widely discussed in conjunction with sustainability, especially in rural areas (for example Everett and Slocum 2013; Creaney and Niewiadomski 2016; Koscak and O'Rourke 2017; Butler 2018; Panzer-Krause 2020). However, among the positive contributions of the tourism industry to the sustainability of rural destinations, a significant number of issues caused by unsustainable tourism development are also discussed, affecting economic, social, cultural and environmental sustainability (Currie and Falconer 2014; Almeida-García et al. 2016; Guaita Martínez et al. 2019; Butler 2020; Niewiadomski 2020).

2.3.1 Rural tourism

Despite rural areas having always been an attractive setting for leisure and recreation, rural tourism as a standalone segment of the industry has received a greater interest only in the last few decades, due to the rural changes and therefore rising complexity in the relationship between rural regions and recreational activities performed there (Hall, Mitchell and Roberts 2017).

Like the topics of rurality and islandness discussed earlier, when exploring rural tourism, it is important to begin with its definition, which, as argued by several authors, does not exist or is very difficult to achieve (Frochot 2005; Sørensen and Nilsson 2017; Guaita Martínez et al. 2019). Frochot (2005 p. 335) notes that the majority of definitions of rural tourism, like definitions of rurality discussed above, are quite broad and insufficient, constituting only "tourism that takes place in the countryside". A wide spectrum of definitions is also seen in a

varied statistical representation of rural tourism in different countries, from farm visits and nature tourism to other wider activities outside an urban setting (Hall, Mitchell and Roberts 2017).

However, it is argued that rural tourism cannot be simply paralleled with one specific type of tourism, such as farm tourism, green tourism or ecotourism, but must allow for a diversity of activities to take place in the rural setting (Frochot 2005). As Lane and Kastenholz (2015) explain, even though a rural tourist may use farm accommodation for overnight stays, the majority of their visit might be spent away from farms, exploring everything else that the countryside has to offer. As such, the term 'farm tourism' cannot be used as a synonym for 'rural tourism'.

Therefore, looking back at the model of rurality (2.1), comprised of 'rural localities', 'representations of the rural' and 'lives of the rural' (Halfacree 2007 p. 127), rural tourism can be seen as tourism that operates in relation to these three aspects of rurality, by taking place in certain spatial conditions (natural areas, countryside, attractive landscapes, bodies of water), showcasing rural everyday life (such as agritourism, wildlife watching, hunting) and is affected by formal representation of its stakeholders (residents, local authorities, NGOs, operators etc.). Similarly, Frochot (2005 p. 336) addresses the subject and defines rural tourism as:

"tourism taking place in rural areas, built upon the specificities of the rural world (open space, rural heritage, etc.), rural in scale (usually implying small scale) and representing the complex pattern of rural world (environment, economy, history and location)".

From these approaches, it can be learned that rural tourism cannot be simply viewed as the opposite of urban and that its complexity and diversity cannot be underestimated. Rural tourism provides a basis for many activities and gives a stage to the diversity of actors. These activities and actors, as well as the interrelationship between them, will differ in every rural region, enhanced by the diversity and complexity of broader rural aspects and their contested manifestation (Heley and Jones 2012).

Indeed, as Nelson et al. (2021) note in their literature review, commentators in this field tend to associate rurality with concepts of fluidity, heterogeneity and context dependence. Such contextual circumstances of a destination would inevitably affect tourism that takes place in it, contributing to shaping the effect tourism has on its environment, social and cultural identity, and economic situation, which can condition the sustainability and sustainable development of this destination. Roberts, Hall and Mitchell (2017) add that integrating rural tourism into wider rural development plans due to such complex relationships between aspects of sustainable rural development can benefit the tourism industry itself, contributing to the overall sustainability implementation.

Commentators agree, however, that the main factors in the popularity of rural tourism are landscapes, open space and opportunity for outdoor activities, contact with nature and exploration of culture and traditions, an opportunity to spend quality time in a stress-free environment and satisfy the nostalgia for 'authentic' and 'good old days' (Kastenholz et al. 2012; Fytopoulou et al. 2021). A highly urbanised environment of many parts of the world and the growing distance between humans and nature, wildlife and uninterrupted landscapes became major factors in vacation decision-making (Curtin 2013).

And yet, there are several problems with this. Looking back at the rural idyll discussion, the expectation of an uninterrupted landscape distracts from the fact that people are a fundamental variable (or rather, constant) of the rural. Such distraction is often seen as a cause for various social issues brought about by tourism, where some visitors negatively affect the quality of life of the local population (see Butler (2020), Ironside and Massie (2020), Ruck (2020) for examples in Scotland).

2.3.2 Island tourism

From my 2022 fieldnotes:

"In the evening, I went to town again to meet Annie at Lucano. The streets were empty again. Annie asked me: "how was your crossing?", which made me think about it as a motif to island travel and island life."

This question accompanied me throughout my trip and beyond. Reflecting on it, I concluded that it is yet another attribute of islandness since I have never

heard it being asked in any other location. I started to pay attention, realising that the question was a common way of greeting those arriving in Orkney, almost symbolising that we have now crossed through potential hardships and finally arrived at the destination, which is very much different from the place of origin, and new exciting experiences are to be expected. While I realised that the question was most likely a mere courtesy, not at all laden with any philosophical or poetic significance, I could not help but search for a more romantic meaning. Have I just romanticised the islands?

Vignette 2.1: Crossing

Keeping in mind the discussion in previous sections, rural island destinations can be susceptible to being romanticised even more than their continental (or mainland) counterparts. Yet, it is that sense of remote, exotic, authentic, insular, unique, and separated, that pulls visitors to the islands (Baum et al. 2000; Carlsen and Butler 2011; Butler 2015; Baldacchino 2021). The sense of travel through the sea, *crossing* the water to a different land, where life is slower, calmer and simply different from the “lifeworld” (Seamon 1980 p.191), the visitors may want to escape from (Carlsen and Butler 2011; Baldacchino 2021). And while such “fantasies of remoteness” (Ronström 2021), evoked by the romantic image of islands are undeniably an opportunity and an asset for the tourism industry, these notions also cause challenges, exacerbated by the fragile and changing environments in which these places and people exist.

In addition, the environmental impact of the *crossing* must be considered. This is because the sea must be crossed to get to the destination, meaning using highly polluting modes of transport, such as ferries, cruise ships and planes are inevitable compounds of tourism experience (Armstrong and Read 2021). Whether the island is close to a mainland or a continent, or far away out in the ocean – this makes the concept of distance decay applicable, where distance and availability of reliable transport to the destination is seen as a major factor in the decision-making process of potential visitors (Baldacchino 2021). In cold water islands, the consideration of distance, how to get there and how much it will cost, is exacerbated by the consideration of climate and weather, which not only affect visitor experience but also the reliability of the said modes of transport needed to reach there (Baldacchino 2021).

Seasonality, therefore, is seen as another building block of this complex structure that is tourism to island destinations, making strategic planning endeavours even more difficult. Guaita Martínez et al. (2019) explore the topic of seasonality in rural tourism and summarise that the effects of seasonality include loss of economic gain during off-peak season and unemployment, misuse of facilities and closures of businesses, affecting the image of the destination, and lower quality of service during peak season, due to low-skilled seasonal workforce. The authors also present the effects of high-season peaks on the environmental sustainability of destinations, when numbers of visitors exceed the existing carrying capacity during peak seasons, concentrating on so-called 'hot spots', as well as detrimental effects on social sustainability, such as infrastructure access during peak seasons, noise and pollution (Guaita Martínez et al. 2019).

Many rural island destinations, whether sovereign or parts of a larger, mainland nation, use tourism to diversify their rural economy away from declining production sectors, often creating over-dependency on the tourism industry (Lockhart and Drakakis-Smith 1997, in Jóhannesson, Huijbens and Sharpley 2010; Graci and Dodds 2012). Some islands have experienced drastic changes to their landscapes, where amenities and infrastructure were developed to accommodate the ever-growing needs of visitors (Carlsen and Butler 2011). Relatively weak economies of scale (Grydehøj 2011) and expertise, and subsequent leakage of economic benefits (Carlsen and Butler 2011) position some islands high up on the vulnerability scale. This is exacerbated by infrastructure and transport problems (Currie and Falconer 2014) and the availability of local resources, such as water and waste management (Creaney and Niewiadomski 2016). This position moves even further up on the vulnerability scale when the impacts of climate change on their fragile environment are considered (Nunkoo, Gursoy and Juwaheer 2010; Armstrong and Read 2021). However, applying the term 'vulnerability' to all islands without the specific understanding of the local situation is seen as simplistic, and research into islands and islandness has proven that island communities have resilience and a strong ability to overcome challenges and become agents for positive change (Walshe and Stancioff 2018).

2.3.3 Archipelago tourism

When speaking in archipelagic terms, and in primary relevance to this research, connectivity, distance decay and seasonality apply not only to an archipelago as a destination but to the sub-destinations within it, often to a greater extent (Agius and Briguglio 2021). While tourism to island destinations is vastly researched, tourism to archipelagos as a distinctive theme, with its unique geographical sub-context and its effect on lives and systems in such destinations, has not yet gained much academic and policy-making attention (Bethel 2002; Bardolet and Sheldon 2008; Baldacchino and Ferreira 2013). This, however, comes with a notable exception of the “Archipelago tourism: Policies and Practices” book, edited by Godfrey Baldacchino (2015a), which includes a variety of case studies to learn from.

Nonetheless, some destinations do harness this sub-context to develop tourism strategies, emphasising the variety of experiences offered by different islands of their archipelago, thus increasing the length of stay and distributing the benefits (Baldacchino and Ferreira 2013). In others, however, most of the tourism development is taking place on the main island of the archipelago, due to its being the first point of arrival, and the complexity of intra-island travel to the smaller, outer islands of the archipelago (Butler 2015). Such a system is often called ‘hub-and-spoke’, when the main island forms the centre of population, main transport links and an unavoidable transit place for anyone arriving at the archipelago (Baldacchino and Ferreira 2013). This in turn has a detrimental effect on tourism development in the surrounding islands, accompanied by unequal benefits distribution and power imbalances between internal and external actors (Baldacchino 2015b; Butler 2015). This often results in vigorous campaigns by peripheral islands for tourism infrastructure development and equal representation of their island in tourism materials (Baldacchino 2015b).

2.3.4 Cold-water island tourism

Another context layer to consider in this thesis is the fact that the studied destination, Orkney Islands, is a *cold-water* archipelago. Unsurprisingly, however, tourism in cold-water islands is significantly underrepresented in academic research and policy attention, with most case studies and discussions

concentrated on tropical, warm water 'paradise' destinations (Baldacchino 2006a; Jóhannesson, Huijbens and Sharples 2010; Renfors 2021). In his edited book "Extreme Tourism: Lessons from the World's Cold Water Islands", Baldacchino (2006a) suggests considering several concepts for tourism development in cold-island destinations. The author asks whether cold can also be a paradise, can remoteness and distance decay be seen as a self-regulating advantage, what are the economic, environmental and social impacts of tourism to such places, and what governance efforts are needed to mitigate these impacts and develop the destination sustainably (Baldacchino 2006a). Cold-water islands and archipelagos, with Iceland as the only exception, are sub-national jurisdictions, together with their natural, demographic and logistical challenges, which sets them apart from the generic island studies and tourism policy-making efforts (Baldacchino 2006a). Arguing that due to such conditions, the numbers of visitors are significantly lower than to their warm water counterparts, the author suggests that with sound strategic planning and local buy-in, this can be used to ensure high value and low impact for the benefit of local communities (Baldacchino 2006b). Yet, many cold-water destinations, including Orkney, are challenged by a growing tourism sector, especially cruise tourism (see James, Olsen and Karlsdóttir 2020; Ren et al. 2021; Plieninger et al. 2018), and the quest for value over volume might seem more difficult than the author suggests.

2.4 Conclusion

The above sections have explored themes that construct the layers of the context of this study. The inevitable restructuring and the need for diversification of economic and social activities, creates sustainability concerns in rural areas, and tourism development plays an undeniably important role in addressing them. As a diversification mechanism, tourism development in rural areas can also provide additional social and economic benefits, such as infrastructure and employment opportunities, thus reducing out-migration of the local population (Fyttopoulou et al. 2021). This is seen as applicable to some rural island destinations as well, where specifics of island and archipelago settings create other challenges and opportunities.

Looking through the islands layer of context, sustainability challenges in tourism existing in some other rural destinations are exacerbated by the geographical and sometimes geopolitical features. A stretch of water that needs crossing, however short or long, adds a unique ingredient to the complex situation, affecting all processes relevant to tourism development – from attracting visitors and their management, to transportation and sustainable supply of goods and services. This in turn affects the economic, social, cultural and environmental sustainability of an island destination, challenges of which can often manifest to a greater extent in islands, than in their continental counterparts.

The layer of archipelagos was also discussed, and the unique challenges of island-island and island-mainland relationships were noted. As with any island destination, as mentioned above, crossing the water applies here as well, but to a greater extent, since it must be done more than once to reach different islands of the archipelago. These circumstances affect how tourism is developed across all archipelago islands, and how the benefits of tourism are distributed across their communities. The challenges exposed by these layers of context can also apply to cold-water islands. Yet, unique features, such as extreme weather, smaller, more remote communities and often more conservative and complex governance sometimes create a more complex environment for sustainable tourism development. It was also observed, however, that these features can be seen as beneficial for such purpose, providing a self-regulating advantage for sustainable development.

What emerged from this chapter is that each layer of context adds unique circumstances to consider in strategic planning for the sustainable development of a destination. Looking through the base layer of rurality, it can be agreed that rurality is a complex, nuanced and heterogeneous subject, encompassing the lives and livelihoods of communities and individuals, affected by policies and decisions based on these definitions. These circumstances can add up to an overall contextual setting of a rural cold water archipelago destination, such as Orkney. To frame the conceptual framework for this study (5.3), four elements can be distinguished, that underpin the contextual complexity of rural archipelago destinations. Drawing on the discussion in 2.1 and expanding on the elements of rurality (Halfacree 2007; Frisvoll 2012), these elements are (1)

places - the rural cold-water archipelago localities; (2) *people* - residents of these places; (3) *institutions* – responsible for the formal representation of these places and their people; and (4) *power* – as a binding concept, that underpins the relationships between people, places and institutions.

At this point of the discussion, it is important to reinforce the main argument, that while some parallels can be made between many destinations across similar geographical conditions, locations and cultures, every destination has a unique set of circumstances that define its challenges and opportunities, therefore must be looked at through its own 'unique' layer of context as well (Figure 2.1). This final layer of context is determined by the interaction between the four elements, listed above, exhibited uniquely in each destination. To link this wider conceptual discussion to tourism development specifically, the following review chapters will demonstrate how such interaction can manifest in a tourism context. How it manifests specifically in Orkney will be discussed in the analytical Chapters 6-9, based on data collection and analysis in this case study research.

CHAPTER 3

Institutions, Power and Strategic Planning

Having considered the main layers of context, applicable to Orkney as a destination (Chapter 2), it is now essential to discuss the specifics of strategic planning for sustainable tourism in more detail. This includes its main components – stakeholders, governance and strategy evaluation process. The discussion will enable formulation of the research gap this thesis aims to address, as well as further develop the conceptual framework for this study.

Sustainable tourism development is contingent on effective governance in strategy and policy implementation (Adi, Amore and Hall 2020; Deladem et al. 2020; Albrecht 2017; Zapata and Hall 2012; Farsari, Butler and Szivas 2011), which in turn relies on sufficient stakeholder engagement (Simpson 2001). However, studies on effective governance in rural tourism are limited (Tirado Ballesteros and Hernández Hernández 2021). While stakeholder collaboration and effective governance in tourism strategy implementation are discussed on national (Macleod and By 2007; Maleković et al. 2019) and organisational levels (Aladag et al. 2020), Lane and Kastenholz (2015) argue that the research needs to progress, among other areas, in evaluating destination strategy-making processes, where there is only limited academic output from earlier rural tourism strategy studies (see Lane 1994; Cawley and Gillmor 2008). Studies specifically

addressing strategy-making and evaluation in island and archipelago destinations, with these layers of context explicitly contributing to the evaluation framework, were not found. This creates a gap in unravelling the complexity of such contexts in tourism and provides insight and potential solutions into sustainable tourism strategy implementation in this complex environment. This chapter, therefore, reviews the relevant literature to underpin this study, that contributes to addressing this gap.

3.1 Stakeholder engagement

In tourism, stakeholder theory is found to be the most frequently used within tourism strategy implementation studies (Aladag et al. 2020) and stakeholders have been a subject in sustainable tourism research worldwide for decades (see for example d'Angella and Go 2009; Wray 2011; Gössling et al. 2012; Ruhanen 2013; Waligo, Clarke and Hawkins 2013; Hardy and Pearson 2016; Nguyen et al. 2019; Wondirad and Ewnetu 2019; Dimitrovski et al. 2021; Tirado Ballesteros and Hernández Hernández 2021). Therefore, tourism and sustainability literature is rich in commentaries and research on the role of stakeholders in sustainability implementation, stakeholder engagement and types of stakeholders and their degree of involvement in the sustainability discourse. Literature suggests that developing and achieving common goals and understanding the direction of tourism development in a destination can benefit greatly from wider stakeholder collaboration (Waligo, Clarke and Hawkins 2013). Simpson (2001) argues that such collaboration in tourism planning, especially in peripheral regions, can contribute significantly to the sustainable development of a destination, determining an agreed strategic direction and maximising equitable benefits distribution. The author presented a list of stakeholders that, in his opinion, should be involved in tourism planning processes, as shown in Figure 3.1.

- Governmental – national, regional and local government
 - national and regional tourism organisations
 - government departments with links to tourism
- Visitation – existing visitor groups
- Community – tourism industry operators
 - non-tourism business practitioners
 - local community groups
 - indigenous people's groups
 - local residents

Figure 3.1: Stakeholder groups for consultation (Simpson 2001 p. 15, Figure 5)

Many other authors echo Simpson’s opinion. Lusticky, Bina and Musil (2015) compiled a list of stakeholder groups relevant to destination management, which includes local government, DMOs, development agencies, tourist sector organisations and universities. Lane (1994 p. 5) adds that “trade and business, transport, farmers, administrators, and the custodians of the natural and historic assets of the area” should be involved in tourism planning in rural areas.

In island research, the subject of stakeholders is also prominent. Graci and Dodds (2010) suggest fourteen different groups of stakeholders in an island destination (Figure 3.2).

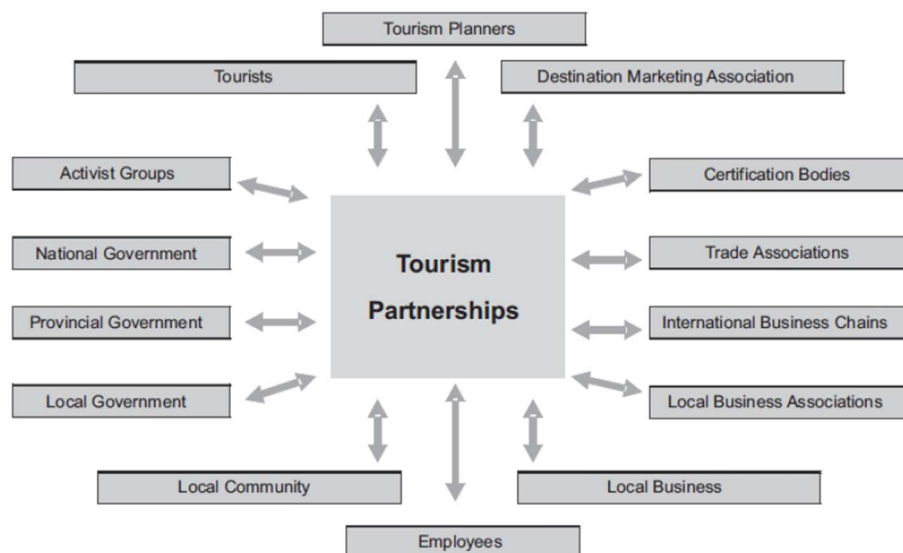


Figure 3.2: Map of island destination stakeholders (Graci and Dodds 2010 p. 23)

This model largely corresponds to the stakeholder groups, presented above, and suggests similar groups of stakeholders, who affect or are affected by tourism development in their destination. However, as discussed in Chapter 2, many of the islands are in fact archipelagos (Baldacchino 2021), and their stakeholder map is complicated by the power relationships between the islands within an archipelago (Stratford et al. 2011). Moreover, as argued throughout this thesis, each destination will inevitably have a unique stakeholder structure, shaped by its unique contextual features.

In addition, it is argued that it cannot be assumed that there is a consensus in opinions among stakeholders within the same stakeholder group and that a variety of opinions, values and ideas can be found within each group (Hardy and Pearson 2016). Some authors also argue that effective engagement of all relevant stakeholders of the tourism industry is practically impossible (Rosato et al. 2021). In addition, Wanner and Pröbstl-Haider (2019) exploring barriers to stakeholder engagement, found that understanding what sustainability means varies significantly among stakeholders, thus increasing such understanding can improve stakeholder engagement in strategic planning for sustainable tourism. Therefore, despite the apparent consensus on the importance of wide stakeholder engagement in strategy-making, the involvement of a large number of stakeholders and a variety of opinions, values and means, may hinder effective decision-making (Simpson 2001; Albrecht 2010). Yet, despite the recognised challenges, the involvement of local communities is particularly important in developing the strategic direction of a destination, especially in rural areas (Simpson 2001; Albrecht 2010). Involvement of local communities in tourism development in their destination is also seen as a key success factor in its sustainable development (Simpson 2001; Hateftabar and Chapuis 2020; Fytopoulou et al. 2021), therefore strategies need to allow for such community empowerment (Hateftabar and Chapuis 2020). Engaging with 'community', however, merits an understanding of what *community* means, with all its diversity and power balances (Dempsey 2010).

3.1.1 Community

Community, however, does not have an overarching definition (Amsden, Stedman and Kruger 2010). In many tourism publications, reviewed for this study, no definition was provided, or it was implicitly considered to constitute the general public, residing in the studied area. MacQueen et al. (2001 p.1927) note that typically, 'community' is seen as a "local geopolitical entity". Amsden, Stedman and Kruger (2010 p.33) similarly, define community as "a construction people use to organize these social interactions in a meaningful way", and observe that many define community "by the physical space in which people interact" (p.34). Linking to the place theory, discussed in the next chapter, Smale (2006) observes that in leisure studies the concept of community is often

used in conjunction with a place (as it is in the present study). The community definitions, thus, often include “shared ideas and expectations, social networks and allegiances, strong sentimental or affective attachments, and typically, place or locale” (Smale 2006 p.372 citing Keller 2003). All the above definitions are useful for the present study, to understand the reflections of Orkney community members on what community means to them, and where their opinions are rooted. Another useful definition is offered by the Islands (Scotland) Act 2018 (Scottish Parliament 2018), which, albeit more technical than the definitions found in literature, helps to understand how communities are regarded in policy and strategy domains by the public sector, specifically in the Scottish islands context. The Act defines island community as:

(a) consists of two or more individuals, all of whom permanently inhabit an island (whether or not the same island), and

(b) is based on common interest, identity or geography (including in relation to any uninhabited island whose natural environment and terrestrial, marine and associated ecosystems contribute to the natural or cultural heritage or economy of an inhabited island).

From this definition, it can be argued that this variety of defining factors alludes to the diversity of communities within and between many islands, and that attempts to understand the characteristics of a given community must be conducted per specific location and situation. This needs to be examined to avoid assumptions and prevent this engagement from turning into a tick-box exercise (Watson and Waterton 2010). In addition, the term community engagement itself, usually used in higher education contexts but also policy and strategy making, is also seen as vague, and one that merits a more explicit understanding of the dynamics of the target community and a more contextualised approach to it (Ang 2006; Dempsey 2010; Watson and Waterton 2010).

3.2 Governance and leadership

Although wide stakeholder engagement is seen as crucial for effective decision-making in the tourism industry, it is also argued that due to the significant fragmentation of tourism as an industry, leadership is a necessary element in the process of sustainable tourism implementation on a destination level

(Waligo, Clarke and Hawkins 2013). Skilled leadership is a necessary part of establishing this effective governance, but in all the diversity and complexity of local politics, such a commodity is difficult to obtain (Lane and Kastenholtz 2015). Haven-Tang and Jones (2012), however, have established that this is not impossible. In their research, the authors provide some successful examples and conclude that the concepts of *followership* and *transformational leadership* are crucial for sustainable destination development, where engaging communities on a grassroots level provides a significant competitive advantage for a rural destination (Haven-Tang and Jones 2012).

In a wider context of tourism, a few more approaches are found to define and understand the governance of tourism development on a regional level. In this context, some authors speak about *transition management*, which “involves integrative and multi-level governance being used to shape and foster development processes, and the choice of policy instruments and actions by individuals and private and public organizations, based on common visions.” (Gössling et al. 2012 p. 900). Others speak about the principle of *subsidiarity*, in which “tasks and responsibilities should be primarily accomplished by the lowest and most basic elements of a social organisation”, supported by central government or a large organisation (Zahra 2011 p. 536). Yet, more authors emphasise that horizontal governance structures, networks and Public Private Partnerships (PPP) are more effective in establishing holistic approaches to destination development (Hall 2011a; Farmaki 2015), where stakeholders are working in partnership to achieve successful and sustainable development of their destinations. Networks as forms of local tourism governance in its three variations: council-led, participant-led and local tourism organisation-led, were explored by Beaumont and Dredge (2010). The authors found that trade-offs were made in each network to meet the needs of its members, with issues arising from such trade-offs. They concluded, however, that to address such issues, a multi-network structure on a local level may be beneficial, where solutions employed by each type of network can complement each other in sustainable tourism policy implementation (Beaumont and Dredge 2010).

Above all, it is argued that, regardless of its structure, it is vital to ensure that the destination’s governance sees the bigger picture of the development

activities and their effect on the wider destination sustainability, instead of focusing on individual projects, preventing “death by a thousand cuts” (Higgins-Desbiolles 2011 p. 553).

3.2.1 Partnership

Effective partnership between tourism stakeholders, which includes residents, institutions and visitors, is “perhaps the most critical dimension of successful and sustainable tourism” (Weaver 2010 p. 207). Farmaki (2015) explores the characteristics of partnership-based governance structures and notes that PPPs (public-private partnerships) can be seen as a good example of a successful governance model when it comes to sustainability implementation. Among other characteristics, identified by Farmaki (2015), inclusion and empowerment of local communities and social equality, awareness of tourism assets and resources, policy integration and alignment on national, regional and local levels are seen as relevant to this research. Moreover, to address SDG17 (1.1), as Adie, Amore and Hall (2020) argue, a longitudinal, context-specific partnership environment is necessary to ensure the long-term benefit of an intervention even following its completion.

Yet, while the benefits of partnership are recognised, Scheyvens, Banks and Hughes (2016 p. 378) argue that partnership rhetoric can “conceal a broad set of tensions around the meaning and implications associated with this apparently affirming term”, such as diverse range of opinions, values and means, and power dynamics. Elsewhere, Reed (1997) argues that such power dynamics within a partnership can alter or even prevent collaboration efforts from happening. More locally, Currie and Falconer (2014), conducting research in a Scottish island destination, found that it is difficult for some tourism stakeholders to adjust to the more collective, partnership approach to destination management, while still looking at the government for the centralised direction.

3.2.2 Local authorities

As the current research concentrates on a destination under a single local authority, it is important to note a few opinions regarding the role of local government in sustainable destination development. With the rise of the

sustainability paradigm, local authorities became responsible not only for the economic growth of areas under their care but also for ensuring social and environmental sustainability principles are embedded and implemented through policy, thus controlling the negative impacts of the booming tourism industry (Ruhanen 2013).

Such control mechanisms were often manifested in the provision and maintenance of infrastructure and facilities, as well as in enforcing planning and land use regulations (McLoughlin and Hanrahan 2016). Local authorities are also responsible for establishing and maintaining areas without financial return, such as parks, paths and playgrounds for the benefit of their community and visitors (Reed 1997). According to Hateftabar and Chapuis (2020), it is the responsibility of local authorities to engage communities in tourism development, provide information on its benefits, and ensure these are distributed fairly. UNEP and ICLEI (2003) provide a list of recommendations for the local authorities regarding their duties in the sustainable development of their destination, based on Local Agenda 21 (LA21). Among these recommendations, the preparation of a local tourism strategy and action plan, aligned with the overall LA21 for sustainable development, is proposed to be undertaken by local authorities (UNEP and ICLEI 2003).

Commentators also note that local governments have the mandate to represent communities in their area through elected local councillors, hence ensuring wider inclusion in decision-making processes (Ruhanen 2013). Some authors add that local authorities should take on a coordinating and enabling role, while a partnership of a range of stakeholders should work on implementing sustainable destination development (Roberts, Mitchell and Hall 2017). Moreover, some maintain that the relative stability and permanence of local governments' structure provide better continuity and certainty in their leading position in sustainable development, compared to the private sector (Simpson 2001). The public sector in general, largely constituted of local authorities in rural and island areas, is often seen as the main enabler of tourism development, whereas other stakeholders are seen as less valuable and their contributions "futile without public sector involvement" (Currie and Falconer 2014 p.165). Yet others argue that local governments, especially in rural areas, need to be a mere 'another

player' in the tourism governance structure, decentralising the decision-making to a public-private body (Tirado Ballesteros and Hernández Hernández 2021).

Regardless of their position in the tourism governance structure, governments on all levels often fall under the critique of being biased towards economic development, while lacking an emphasis on environmental protection and social inclusion (Bramwell and Lane 2011; Higgins-Desbiolles 2011; Ruhanen 2013; Maxim 2016). Lack of strategic view and insufficient long-term focus in their policies are also noted as drawbacks of some governments (Go, Milne and Whittles 1992 in Ruhanen 2013). Moreover, insufficient skills and resources in assessing the performance of specific sustainability indicators inhibit the effectiveness of their implementation (Gkoumas 2019; McLoughlin and Hanrahan 2019). Top-down planning and strategic direction, imposed by governments, manifested in a lack of consultation and consideration of the diverse needs of its communities is also seen as problematic (Dredge and Jenkins 2007; Gkoumas 2019). Most importantly, local authorities are often met with a feeling of mistrust, hindering effective sustainability implementation (Gkoumas 2019).

Nonetheless, local authorities of island destinations have a somewhat different position, despite that the above critique is undoubtedly applicable to some. In small island jurisdictions, local government often forms a disproportionately larger size, per head of population, than many mainland local authorities (Grydehøj 2011). This, combined with more autonomy due to the remote location, creates a unique opportunity to take development into their own hands to a greater extent, and make decisions that benefit the locality, rather than conform to the generic direction of the parent country (Grydehøj 2011; Baldacchino 2020). Therefore, despite the criticism and due to the strengths, they can bring to the table, local authorities are seen as better positioned in leading destinations in their sustainable development efforts (Ruhanen 2013).

3.2.3 Destination Management Organisations

Destination Management, or Marketing, Organisations (DMO) have received a fair share of attention in the literature, due to their perceived integral role in a destination's growth, achieved by attracting higher visitor numbers (Hall and Veer 2016). With the recognition of the benefits of wide stakeholder engagement

for sustainable destination development, a transition from government to governance and more bottom-up decision-making (Hall 2011a; Chaperon 2017), a more holistic approach to destination management is being sought. As a result, destination *marketing* organisations were expected to expand their remit beyond marketing to *management*, engaging stakeholders including host communities, ensuring robust governance and stronger private sector leadership (Stevens 2020).

Such expanded remit of what is now most often called Destination *Management* Organisation includes a variety of responsibilities, some of which are summarised in Table 3.1 below.

Remit	Roles
Strategy	Connect the fragmented and complex elements of tourism industry in a destination; Develop bespoke vision, objectives and strategic direction for their destination; Destination planning, monitoring and evaluation.
Growth	Drive economic growth of the destination by increasing visitor numbers, employment opportunities and tax contributions.
Resources	Secure financial and human resources for development projects; destination knowledge management.
Marketing	Marketing, branding and positioning; Create competitive advantage, applying creativity and innovation; new tourism product developments based on destination values and visitor experience; maintain commitment to growth of visitor economy; standards development and quality control of tourism product.
Partnership	Ensure community wellbeing and inclusion in decision-making; Drive partnership and collaboration between stakeholders; Work in loose partnership with other DMOs on a regional level.
Sustainability	Transition from being reactive to responsible; lead the process of determining carrying capacity of a destination; visitor management.

Table 3.1: A variety of roles of a DMO (adapted by author from Pike and Page (2014), Varghese and Paul (2014), Hall and Veer (2016), Reinhold, Laesser and Beritelli (2018), Eckert et al. (2019), Foris et al. (2020) and Stevens (2020))

This variety of responsibilities, attributed to DMOs, is considered as a way they are adapting to the political, economic, technological and organisational changes, relevant to tourism. As discussed above, the change towards horizontal, network organisational structure started to appear, along with more process-orientated management, requiring “to shift perspectives and simultaneously adhere to multiple success definitions” (Reinhold, Laesser and Beritelli 2018 p. 429). Yet, questioning the viability and relevance of these organisations because of these changes, Hall and Veer (2016 p. 356) argue that economic growth is still the ultimate measure of DMO success and that, somewhat pessimistically, as long as this is the case, DMO will “continue to survive, even if many other species on the planet will not”.

Despite the widely argued idea that DMOs have evolved beyond their primary marketing focus, Pike and Page (2014) maintain that it is inappropriate and misleading to call such organisations *management*, and not *marketing*, due to their very limited practical and logistical ability to manage the destination. The majority of the management abilities lie with local authorities, followed by other public sector agencies, private sector membership organisations and conservation, community and development groups. It is the close collaboration between the local authorities and DMOs that can result in coordinated marketing and management activities for the benefit of the destination (Pike and Page 2014). Moreover, a strong relationship between DMOs and local authorities is seen as vital to achieving growth objectives, regardless of the degree of dependence of DMOs on public funding (Mandić and Kennell 2021). This once again confirms the need for some form of partnership arrangement for effective and efficient destination management, harnessing the strengths and abilities of each partner organisation.

Linking DMO, public-private partnership (PPP) and the role of local authorities in destination management to the context of a small island destination, Chaperon (2017) conducted a case study looking at the challenges and opportunities of PPP as a DMO in such context. The author concluded that in small island destinations, where the public sector’s presence is disproportionately strong and the interrelation between residents employed by private and public sectors (or sometimes both) is common, standard PPP as a governance structure for

destination management can be problematic and should be tailored to the local island context to ensure buy-in (Chaperon 2017).

3.2.4 Power

The fate of rural communities has often been determined by the power structures, arising from the combination of fundamentally rural processes, and the ongoing integration of new systems and actors within these rural processes (Peng et al. 2018). Therefore, an element of power, manifested in this context (Frisvoll 2012; Peng et al. 2018), can shed light on the challenges and decisions the studied destination is facing. Such considerations of power can also be affected by the structure of tourism governance in the destination, influencing the decision-making process and its strategic direction (Bramwell and Lane 2011).

The element of power in the tourism governance structure was explored by Saito and Ruhanen (2017 p. 194), who identified four types of power: coercive (exercised by governments and public sector organisations), legitimate (possessed by DMOs, operators and private sector), induced (organisations, providing financial resources) and competent (educational institutions, consultants). However, Reed (1997 p. 567) defines power as “ability to impose one’s will or advance one’s own interest”, and suggests that personalities and individual circumstances also need to be considered when discussing power relations on a local level. Specifically in tourism strategy, power is seen as a component of *critical tourism strategy* (Table 3.2), which determines whose interests and values it is serving, and who will be the winner and the losers because of its implementation (Tribe and Paddison 2023).

Moreover, other authors in tourism and beyond, reviewed power dynamics in complex settings in conjunction with other concepts, such as trust (Nunkoo and Gursoy 2016) and agency (Kok, Loeber and Grin 2021). Kok, Loeber and Grin (2021 p.4), quoting Giddens (1984), refer to the agency as “not to the intentions people have in doing things but to their capability of doing those things in the first place”. The authors, consequently, regard power as “an emergent and productive phenomenon that is embedded in relationships” (p.5). The authors relate the two concepts in that power is created from interaction

between components of a complex system, whereas agency is a property, that can be in possession of some actors but not the others (Kok, Loeber and Grin 2021). Yet, in tourism research, as Codina, Lugosi and Bowen (2022) observe, increased attention is given to the agency of local residents, which allows them to contest established power dynamics between internal and external stakeholders.

In addition, power within and between communities, and any other players in a rural archipelago destination is not the only dimension of power applicable in this context. As noted in section 3.3.2, the political and legal jurisdiction dimension plays a key role in the development of an island destination, due to the power balances between the archipelago mainland, surrounding islands, national government and any further political structure of the parent country.

Baldacchino (2020) provides an extensive discussion on the relationship between non-sovereign islands and their mainlands, arguing that the distance between the island/archipelago and its mainland plays a significant role in empowering islands to decide their own future. The author opines that the farther the distance, the stronger this empowerment may be, allowing islands to have more jurisdictional autonomy in their development decision-making (Baldacchino 2020).

An example of such empowerment was also provided by Baldacchino (2020). In Scotland, before the first Independence Referendum in 2014, the three island local authorities, Comhairle nan Eilean Siar (Western Isles), Orkney Islands Council and Shetland Islands Council, launched a joint campaign, Our Islands Our Future, to the Scottish and UK Governments, demanding to recognise the unique position of Scottish islands. The campaign “wants the islands’ unique circumstances to be formally recognised in the constitutional arrangements post the independence referendum – notwithstanding the result of the referendum” (Orkney Islands Council 2014), seeking “additional powers and resources to give [participating local authorities] a greater ability to shape the destinies of Orkney, Shetland and the Western Isles” (Comhairle nan Eilean Siar 2022).

This successful campaign, the initiators of which were called by Mitchell (2013) “purposeful opportunists” for its strong and timely organisation (Jennings 2017), subsequently led to the passing of the Islands Bill in 2018 into Islands (Scotland)

Act 2018, accepting the campaign demands into legislation. The Act sets the legal scene for The National Islands Plan and its Route Map, where issues such as sustainability, transport, fuel poverty, education and community empowerment are addressed (Scottish Government 2019; Scottish Government 2021). The Act also sets legal provisions for more autonomy for local councils when it comes to decision-making affecting the communities in their care, including impact assessment of any national policy, strategy and service on these communities (Islands (Scotland) Act 2018). The original campaign has also provided a springboard for the Islands Growth Deal programme, where financial commitment was secured from both Governments for £100M investment in projects that “seek to drive economic growth and the creation of sustainable jobs across Shetland, Orkney and the Outer Hebrides” over the next 10 years (Islands Growth Deal 2022).

This, therefore, can be seen as an example of small, peripheral, remote sub-national areas, existing in a complex political environment, able to exercise their power and overcome the stereotype of vulnerability and weakness (Walshe and Stancioff 2018). It provides an example of resilience, innovation and forward-thinking when it comes to their own development. However, it is important to remember that in an archipelago context, the power relationships are also driven by the internal organisation of islands within the archipelago (Stratford et al. 2011; Favole and Giordana 2018), which can be manifested in a variety of ways, as discussed previously.

3.3 Strategy evaluation

Since this research aims to propose a place-based strategy evaluation framework, a fuller understanding of this subject is necessary. Strategy evaluation is seen as an important process for ensuring that the strategy addresses the needs of the destination, allowing for its efficient and effective implementation and long-term impact (Maleković et al. 2019). These principles address the basic requirement of any strategic plan, however, strategic plans for sustainable development must meet specific sustainability objectives of a destination, as well as adhere to the foundation elements (Figure 1.1). As noted by Roitershtein (2022), the evaluation of sustainable tourism strategies seeks to confirm the extent they embed sustainability principles, thus attempting to

predict the success of sustainability transition in the destination (Ruhanen 2004).

It is widely accepted that the evaluation of strategic plans does not merit solely evaluating the implementation outcomes but must be applied to earlier stages of strategy development as well (Albrecht 2010). The author refers to Fennel (2006) and Dredge and Jenkins (2007), noting that different evaluation criteria may be applied for each stage of the process, including the evaluation of alternative strategies and even the evaluation of the evaluation tool itself, to improve future strategic planning (Albrecht 2010).

Lane (1994) argues that a wider holistic approach must be taken in developing sustainable tourism plans, providing a list of main concepts to be included in such strategies. While several of these concepts are aligned with foundation elements (Figure 1.1), provided by Simpson (2001), Lane (1994) introduces additional elements, such as linkage to marketing strategy, inclusion of training and career enhancement and quality assurance programmes, and specifically support for farmers and rural economy diversification, avoiding over-reliance on tourism industry. It is also argued that sustainable tourism strategies cannot be developed as a stand-alone activity and that aligning it to wider systems of the region will prove more effective (Hall 2000).

In addition to these characteristics of sustainable tourism strategies, detailed evaluation tools can be found in academic literature. Pioneering the way towards a sustainable tourism strategy evaluation framework, Simpson (2001) provides a comprehensive evaluation tool based on stakeholder participation and strategic orientation principles, that can be applied to regional tourism strategies. This framework consists of fifty-one evaluation items, split into five sections: stakeholder participation, vision and values, situation analysis, goals and objectives, and implementation and review, and it was applied to nineteen regional strategies in New Zealand to confirm its reliability (Simpson 2001).

The tool developed by Simpson (2001) was later adapted and applied to thirty tourism strategies and plans in Australia by Ruhanen (2004). However, and although the original tool was meant to be used for quantitative analysis, here the author chose to apply it qualitatively and solely by the researcher, arguing

that the rigorous quantitative technique used to develop the tool by Simpson (2001) inherently reduces some subjectivity in its qualitative application (Ruhanen 2004). The tool developed by Simpson (2001) was later applied, with small modifications to adjust to the local context, to other destinations and settings, including the evaluation of eleven regional tourism plans in Portugal (Simão and Partidário 2012), and six management plans of Industrial World Heritage Sites in the UK (Landorf 2009).

Lusticky, Bina and Musil (2015) proposed another tool for strategy evaluation, based on relevant literature, similar to Simpson (2001), listing evaluation criteria for each theme. However, their main focus was the competitiveness of a destination, as opposed to its sustainability. Nonetheless, it does include the main guiding themes of the evaluation – strategic position of the destination, stakeholders' involvement and feasibility (Lusticky, Bina and Musil 2015). The tool was applied to eight European destinations, and comparing the result obtained via five-point scale scoring, the authors were able to identify good practices and use it as a benchmarking tool for strategy evaluation (Lusticky, Bina and Musil 2015).

Additional detailed evaluation tools for sustainable tourism strategies can be found in industry literature, such as a framework developed by the Sustainable Tourism Working Group (2012), applied to the Polish national tourism strategy (Śliwa-Martinez 2012). This is an indicator-based scorecard tool, applicable to national tourism strategies, national biodiversity strategies and action plans, and it was developed "in light of the EU biodiversity policies and the Agenda for a sustainable and competitive European tourism" (Sustainable Tourism Working Group 2012 p. 3). The evaluation is calculated based on weight and score for each criterion, resulting in a total score, which is then graded according to a five-point scale, ranging from 'sustainable' to 'unsustainable' (Sustainable Tourism Working Group 2012). The tool's predominantly EU focus, its national application and complex weighting and scoring technique, could not be regarded as holistically applicable to evaluating a local strategy in Scotland, however, it was decided to take its principles into account in the conceptual framework.

In 2019, the Global Sustainable Tourism Council (GSTC) published its revised GSTC Destination Criteria – a document that aspires to create "a common

understanding of sustainable tourism”, including a detailed list of sustainability criteria, that “are the minimum that any tourism destination should aspire to reach” (Global Sustainable Tourism Council 2019 p. 1). These criteria are organised into four main subjects: sustainable management, socio-economic impacts, cultural impacts and environmental impacts, and introduce indicators for evaluating the destination’s sustainability against the set criteria, also referencing relevant SDGs for each part. Criterion A2, under the Sustainable Management section, is ‘Destination management strategy and action plan’, referencing SDG17 (sustainable partnership) and listing five indicators to address it (Global Sustainable Tourism Council 2019). While this is the only criterion that targets the strategy document itself, the rest of the framework aims, among other important objectives, to provide a basis for destination sustainability certification and offer guidelines for sustainable tourism development (Global Sustainable Tourism Council 2019).

Additional criteria are expected to be met when developing these strategic plans. Lane (1994) argues that such development must be undertaken by a person/team with skills in economic, social and environmental sustainability subjects, in addition to their tourism development abilities. The author adds that an impartial approach is vital in addition to the local knowledge, for maintaining trust during the process between various stakeholders involved (Lane 1994). It can be understood from this opinion, that the strategy development process may benefit from being led by an external consultant, to ensure impartiality and a stronger skillset. However, care must be taken in selecting such assistance, to avoid conflict of interests. Tosun and Jenkins (1998, cited in Simpson 2001 p. 18) argue that in many cases “first world multi-national consultants” are the ones who develop these tourism plans, applying sophisticated generic planning tools aimed more at reputational enhancement, rather than specifics of the destination and its objectives. According to the authors, such situations provide proof that a formal planning process does not necessarily guarantee its success (Simpson 2001).

An additional concern is expressed by Albrecht (2010), that while local stakeholders, sometimes volunteering for this activity, may not be skilled and equipped enough to perform a decision-making role, they may express mistrust

towards external professionals without local knowledge, thus hindering the decision-making process. In addition, Simpson (2001), and subsequently Ruhanen (2004), add that alternative strategies might need to be considered when choosing the final strategic direction. Finally, Lane (1994 p. 15) emphasises that the strategy-making process is not a one-off event, but an ongoing endeavour “able to cope with change, and able to admit to its own mistakes and shortcomings”.

Another interesting approach to tourism strategy and its evaluation is proposed by Tribe and Paddison (2023), who offer a typology to assist evaluation and underpin strategy development. The authors argue that there are four domains, applicable to tourism strategy, as summarised in Table 3.2 below.

Traditional tourism strategy	Traditionally structured, with mission, vision, objectives, current state and desired state specified. Implementation plans included and stakeholder input generally sought. The strategy emphasises process and control and means over ends.
Mindful tourism strategy	Considers not just the narrow concerns of achieving a specific outcome but also take account of the wider context in which a strategy operates. Often guided by principles of sustainable and responsible tourism and is underpinned by cost-benefit analysis to ensure broader societal impact, as opposed to narrow economic benefits.
Critical tourism strategy	Critically considers functions and ideology of institutions, and power dynamics that might affect the strategic direction, and winners or losers as a result of it. It promotes values of emancipation and considers alternatives to growth and profit. It considers benefit to people and planet as an end goal, rather than the means to achieve its objective of profit.
Marxist tourism strategy	Radically challenges the contemporary notions of capitalism and free-market economy, prioritising the needs of workers and critiques capital accumulation.

Table 3.2: Four tourism strategy domains (Tribe and Paddison 2023 pp.2-4)

The authors then applied this typology to seventeen national tourism strategies from around the world, where only three of those conformed to the Mindful strategy type, and the remainder showed attributes of Traditional strategies. Most of the strategies emphasised growth and profits throughout, with merely soft targets to tackle wider environmental and societal issues, privileging the

needs of tourists and tourism businesses over wider society (Tribe and Paddison 2023). However, although the authors provide a useful and interesting interpretation of strategic narrative in their evaluation, the approach raises a question as to how it can be possible to determine whose values are reflected in a strategy without speaking first to those whose values are sought? How can this be done without evaluating the local context first? Moreover, how can such determination be performed on a national scale, where the diversity of values, needs and power dynamics is inevitably present on an extensive scale? The present study, therefore, will attempt to address these questions and offer a context-specific local strategy evaluation, where the voices of affected communities are at the centre of the evaluation.

3.3.1 Islands and archipelagos

“Archipelagic diversity yes; but on whose terms, and in whose words?”

(Baldacchino and Ferreira 2013 p. 87).

Sustainable tourism strategy-making for archipelago destinations requires consideration of specific features of archipelago tourism (discussed in Chapter 3). Intra-island travel, the diversity of islands within the archipelago and varied levels of tourism infrastructure on the archipelago isles (Bardolet and Sheldon 2008; Baldacchino and Ferreira 2013), make up an additional level of complexity for strategies in such destinations. Such complexity is recognised in the infrastructure and economic development of the islands, and generally balancing opinions of the communities regarding tourism development on their islands (Bardolet and Sheldon 2008; Baldacchino and Ferreira 2013). Bardolet and Sheldon (2008) add that issues in tourism development in archipelagos, as opposed to single island destinations, also include complex governance, challenging stakeholder engagement, differences in stages of tourism area lifecycle between the islands, criticality of inter-island travel and standardisation of statistical data. It is the balancing between the needs of a variety of “island publics and constituencies” when it comes to transport infrastructure, diverse representation in tourism and cooperation in economic development makes the archipelago dynamic so challenging (Baldacchino 2015b p.7).

Thinking about strategy-making for island destinations, archipelagos included, it is important to keep in mind the definition of islands and islandness, discussed in

2.3. Simplifying the definition of an island only by its geographical features, namely land surrounded by sea (Oxford University Press 2019), can serve as an uncanny tool for wrongful representation of islands as places isolated in space and society, idealised to the extent that they are presented in “a better light than they perhaps deserve” (Grydehøj 2017 p. 10). Such representation often occurs in sustainability research and policymaking, where focusing on solving one problem, more pressing issues can be overlooked. For example, Baldacchino and Kelman (2014) argue that academic and policy pursuit of sustainability in Small Island Developing States manifests itself in mitigating physical climate change risks, and other, arguably more pressing matters, such as healthcare, poverty reduction, education and livelihood challenges are neglected. Grydehøj and Kelman (2017) critically discuss islands’ chase of green branding, ‘eco-islands’ and pursuit of sustainable image as *conspicuous sustainability*, arguing that more meaningful, context-dependent policymaking and sustainability implementation is required, for the sake of islanders themselves.

Despite the complexities encountered in finding the right strategic direction for a given archipelago destination, some of these characteristics can be harnessed for its benefit. Such characteristics, especially in cold-water destinations, where political powers are sometimes in “wary, conservative, local political elites” (Baldacchino 2006b p.195), can help control visitor numbers to maintain low-impact visitor economy, retaining higher value within the destination.

3.3.2 Strategy for successful destination

To understand what affects strategic planning for sustainable tourism, it is important to explore how local stakeholders perceive success in its implementation, and what is the essential criteria to achieve this success. However, it is noted that what is considered successful for one stakeholder, will be deemed as failure for another, thus adding to the implementation challenges (Albrecht 2010). Nonetheless, in tourism research some studies attempted to identify and frame what constitutes a ‘successful’ tourism destination, to develop a tool for its evaluation (Bornhorst, Ritchie and Sheehan 2010). The literature argues that success is viewed in economic terms, effective marketing (brand awareness), product and service offer and quality of visitor experience, as well as internal stakeholder interaction (Bornhorst, Ritchie and Sheehan 2010).

Furthermore, Hall and Veer (2016) argue that the success of a destination is measured in units of economic growth, such as visitor numbers and expenditure. In the archipelago context, Butler (2015 p. xxii) notes that “[s]uccess in tourism, if that is the correct term, tends to generate further tourism therefore, sometimes to the detriment of potential tourism to other islands in the archipelago.”

Yet, when discussing the sustainability of a destination and tourism’s impact on its communities and visitors, it is argued that more emphasis on place, people and environment should be present in the definition of a successful destination. Stevens (2020 p. 210) points out that “destination success is highly dependent upon the clarity of its positioning, the nature of its tourism offer, and sustainable and ethical foundations”. Adie, Amore and Hall (2020) add that a shared understanding of success can be achieved through a partnership approach to destination development. Lewis-Cameron and Brown-Williams (2022), studying perceptions of success, its determinants and barriers in an island destination, conclude that a major strategic shift is needed, especially following the COVID-19 pandemic. The authors recommend a transition from management to stewardship, from product to experience, from quantity to quality and from stakeholder presence to engagement, to achieve destination success (Lewis-Cameron and Brown-Williams 2022).

3.4 Conclusion

This chapter presented a review of applicable theoretical and practical aspects pertinent to this thesis. These include stakeholder theory and stakeholder engagement in strategic planning and tourism decision-making. In this discussion, the complexity of stakeholder engagement was recognised, and a variety of influencing factors were discussed to assist with its unravelling. These influencing factors include the characteristics of destination communities, specifically in rural and island areas.

In addition, the governance topic was discussed. It was argued that effective governance and leadership are necessary to ensure the needs of a variety of stakeholders are met in strategic planning. Types of governance structures and leadership approaches were reviewed, and it was revealed that networks and

partnerships between the public and private sectors are seen as the most effective for sustainable development. It is important to recognise, however, that governance in tourism can manifest in a variety of ways in different destinations (Hall 2011a). It is therefore imperative to explore such manifestation in Orkney, thus ensuring a full understanding of its structure to allow for effective evaluation of its strategy.

Within the review on governance and leadership, two main players were introduced into the discussion, due to their direct relevance to the present study. Firstly, the role of local authorities within destination governance and sustainable development was discussed, including islands and archipelagos. It was found that there are several advantages and disadvantages to local authorities taking the leading role in destination development, but their involvement was seen as vital. Secondly, the roles of DMOs were discussed, including some critical opinions about their viability and effectiveness in achieving sustainability in a destination. Once again, the need for a partnership approach, tailored to a local context, was noted. This led to the discussion on the element of power within and between varied stakeholder groups in a destination and its macro environment, including when applying island and archipelago layers of context, to explore its potential influence on strategic decision-making within its governance structures.

This chapter demonstrated how the four elements, discussed in Chapter 2, can be recognised in a tourism context. Here, the *people* element includes the stakeholders of tourism, with special emphasis on communities. *Places* element of the rural cold-water archipelago adds more complexity, since it affects not only the practical aspects of tourism development but also the *power* dynamics between the stakeholders. And lastly, the institutions – the governance – of tourism, with its two main players (local authorities and DMOs), was also discussed, underpinned by the element of power.

Recognising these elements, the discussion on strategy evaluation took place, including a review of the existing tourism strategy evaluation frameworks, following which several gaps were recognised, which this study can fill.

Summarising these gaps, it can be argued that the current literature has not yet sufficiently addressed place-based sustainable tourism strategy evaluation on a

local destination level, one that would consider the specific context of such a destination. This is especially important for a rural cold-water island/archipelago destination, where these layers of context reveal unique circumstances that may affect such evaluation, thus making generic evaluation frameworks or frameworks developed for other specific purposes, inapplicable. Furthermore, such localised evaluation must consider the sustainability needs of the destination, as decided by its people. It is therefore the task of this study to identify and understand those sustainability needs before evaluating the strategy (1.4). Following the introduction of place (Chapter 2) and of people, institutions and power (this chapter), the next chapter includes a theoretical discussion on the relationship between these elements in the tourism context.

CHAPTER 4

Place and People

Place is created when people endow a physical space with value and meaning (Tuan 1977). It encompasses not only a physical setting but is charged with an emotional power, which is underpinned by its interaction with people. It is this resulting “reality to be clarified and understood from the perspectives of the people who have given it meaning” (Tuan 1979 p.387). Understanding of *leisure*, therefore, can be significantly enriched by understanding the *place*, as a key factor in shaping people’s lives and experiences (Smale 2006). Accordingly, place theory is seen as a useful tool for analysing the relationship between the elements of place, people, institutions and power, discussed in previous chapters, to understand the unique Orkney layer of context (Figure 2.1).

This chapter, therefore, reviews the relevant aspects of place theory and relates it to the tourism development context. The discussion concentrates on the notions of sense of place, place identity and place attachment, as a manifestation of *place-people* relationship. It will also determine the applicability of these concepts to studying residents’ perceptions of tourism development, which is seen as a placemaking activity. This placemaking is initiated and performed by the *institutions*, or formal representations of the rural (2.4), and

underpinned by *power* dynamics between stakeholders of this placemaking, including residents.

4.1 Place theory

In tourism research, place has increasingly been considered as a contextual factor “influencing behaviour, shaping perceptions, and defining experiences” (Smale 2006 p.369). The concept of *place*, as opposed to the physical setting of *space*, gained attention in the 1970s in the field of human (humanistic) geography, among those who argued that a shift is needed from spatial science to reconnection with the human element of places and their lived experiences (Smale 2006). As Tuan (1997 p.6) explains, “what begins as undifferentiated space becomes place as we get to know it better and endow it with value”. This endowment happens individually, with each person attributing their own unique set of values, thus creating multiple places from the same space (Stedman 2003). Shamai (1991 p.355) adds:

“The person is connected to place and is shaped by it. The person gives the place its meaning, but in return receives the place’s meaning. The place’s character is defined according to the human beings, who impose their views, attitudes, beliefs, symbols, and myths on the places.”

In addition, Smale (2006), summarising the theoretical literature, sees place as subjectively defined, contextualises social relations, bonding and cohesion, and constructed materially, socially and imaginatively by many types of people at any scale. Drawing on Relph (1976), the author also notes that while the meaning of place may be rooted in its physical spatial setting, it is a “property of the human intention and experience” (Smale 2006 p.371). While there exists a wealth of literature on the concept of place, in its humanistic meaning, this study draws on a small number of elements of its theory, to underpin the analytical discussion. The three main concepts that are reviewed here are place attachment, place identity and the overarching concept of sense of place. These concepts are emphasised in this review due to their more profound relevance to the topic of residents’ perceptions (4.3), and thus to the present study.

4.1.1 Place attachment

This short review begins with the concept of place attachment, which, according to Smale (2006), is a relatively recent concept, often used in leisure literature. According to Stedman (2003), place attachment is a positive bond between people and a place, which is developed based on specific attributes of a place and their relation to the characteristics of a person. Lewicka (2008) notes that place attachment, as an emotional bond between people and place, helps to create a sense of certainty and stability, especially in times of change, and enables involvement in local matters and participation in activities.

With rural changes (2.1.1), the topic of place attachment in rural context is also gaining interest in literature. It is suggested that rural residents have higher place attachment and place identity, than urban residents. This is due to more regular social interaction within the community, tighter friendship ties and more involvement in collective activities, as well as historical family connections rooted in the place (Belanche, Casaló and Rubio 2021). And even more prominently in island communities, where it is intensified by the physical boundaries and where the sense of islandness is absorbed “through the obstinate and tenacious hold of island communities”, helping them to overcome the threats of the new rural normal (Conkling 2007 p. 191). Such place attachment is also enhanced by wider access to natural environments, that allow for recreation, opportunity for privacy and isolation and emotional connection to nature (Belanche, Casaló and Rubio 2021). Moreover, in places with historical sites, in direct relevance to Orkney (6.3.1), the feelings of place attachment can be intensified, since the presence of such sites fosters a sense of continuity with the past and, therefore stronger sense of stability (Lewicka 2008).

Moore (2021) explores place attachment and planning topics and shows that while in some instances place attachment can underpin community-led place development, it is common that it can often be seen as protectionist and preventing development. According to the author, encouragement of taking an active part in place planning, based on such attachment, may empower those with capacity and means, instead of empowering a shared vision (Moore 2021). Nonetheless, wellbeing, driven by the ability to participate in planning and

enacting initiatives aimed at the community's own areas, is seen as a factor in the sustainable development of rural areas (Casini et al. 2021).

While place attachment is often regarded as one of the components of the sense of place (4.1.3), and therefore implied to be a useful construct for studying place-related topics, a significant critique on this account was provided by Smale (2006 p.378). The author, referring to the classical authors in humanistic geography and place theory, posits:

"I suspect, however, that both Tuan and Relph would be surprised, if not appalled, at the way in which some leisure researchers have used their work as justification for the reductionism of place to a psychological construct in the form of place attachment."

Indeed, as will be discussed in 4.3, the positivistic stance of many of those studies based their arguments on notions of place attachment, as well as place identity and place image, to explain residents' perceptions of tourism development, reducing the concept of place to a list of indicators or factors, tested on a quantitative scale. Yet, as will be argued further in this chapter, place attachment is but a component in a more appropriate approach of sense of place, which better supports understanding, as opposed to exploring.

4.1.2 Place identity

Another concept, often used, and confused, with place attachment, is place identity. Proshansky, Fabian and Kaminoff (1983) argue that place identity is a person's strong place attachment to a particular place. Hernández et al. (2007), on the other hand, confirm that place attachment and place identity are distinct, albeit related, concepts. Place identity develops over time of attachment to the place, and the strength and correlation between them depend on the origin of a person (native or non-native) in relation to the place (Hernández et al. 2007). Conversely, Shamai (1991) positions belonging to a place on a 'weaker' side of the scale, before place attachment.

While many studies define place identity in its *person-centred* sense, whereby a personal identity is shaped in relation to a place (Hernández et al. 2007; Proshansky 1978; Lewicka 2008; Proshansky, Fabian and Kaminoff 1983), some authors recognise that place identity can also be looked at in a *place-centred*

sense (Peng, Strijker and Wu 2020; Farrell and Carr 2022; Paasi 2001 and others). In this sense, place identity is what distinguishes the place from others, its unique environmental and social features, and their usage in a variety of place-related disciplines and processes, such as politics, governance, marketing and tourism (Peng, Strijker and Wu 2020). Such understanding departs from the one presented in classic works of human geographers (Tuan 1977, 1979; Relph 1976) and environmental behaviourists (Proshansky 1978; Proshansky, Fabian and Kaminoff 1983). However, the current study finds merit in both approaches, to the extent that place identity in its place-centred approach (manifested in attributes of the sense of place), is informed by place identity in its person-centred approach (Chapter 6).

Place identity, especially in its place-centred sense, received a fair share of critique. According to Peng, Strijker and Wu (2020), such critique amounts to a lack of agreed definition, including the fact that places are often identified based on their unique and most prominent features, such as well-known landmarks. Chen, Hall and Prayag (2001) quote Pacione (2001 p.353), saying that “certain places are regarded as distinctive or memorable through their unique characteristics or imageability and so have a strong sense of place”. In the authors’ view, and somewhat confusingly, place identity is a compound of place attachment, which, in turn, is a compound of sense of place, thus this imagery is directly contributing to the sense of place. Driven by the physical imagery of a place, place identity in its place-centred sense is therefore aligned with the concept of place image, as constructed by the residents based on its physical characteristics, as opposed to their emotional attachment to it (see Styliadis et al. 2014). It is argued, however, that this is simply an image of a place, and that its identity is much deeper and should include the meaning that was given to the place by its people (Paasi 2009). The people, however, ascribe identity to their place based on their interest, knowledge and power, thus creating *contested identities* (Peng, Strijker and Wu 2020). Moreover, these identities are constructed according to the subjective meaning of the place in relation to time (Paasi 2001).

Interestingly, Peng, Strijker and Wu (2020) observe that place identity is usually not on people’s minds when they experience the place, but only until their sense

of place is threatened by a change. Tuan (1979) adds that place identity is formed as a result of competition and conflict, or when the threat of loss is present. It can be argued, therefore, that when tourism development brings change to a place, that contradicts this unconscious place identity, it becomes more obvious and conscious. In such circumstances, the relationship between a place and its residents is manifested in how they respond to changes brought about by tourism development (Chen, Hall and Prayag 2021).

4.1.3 Sense of place

It can be seen from the discussion above, that definitions of place attachment and place identity are often overlapping, and provide a rather patchy foundation for a complex study. Therefore, it is argued that the concept of sense of place can provide a more solid ground for it. However, the definitions of sense of place are also contested in literature, and this section will attempt to make sense of its most relevant aspects.

Mulvaney, Merrill and Mazzotta (2021), based on the literature they reviewed, regard sense of place as an overall concept, which incorporates place dependence, place attachment and place identity as its components. In their view, place dependence is the degree of reliance of people on resources that the place offers, place identity is the emotional reliance of a person on a place to construct their own identity, and place attachment is "how important a place is to someone beyond the resource or identity dependences" (Mulvaney, Merrill and Mazzotta 2021 p.4). According to Stedman (2003), sense of place is comprised of place attachment and place satisfaction, whereby one does not have to correlate with another (a person can be satisfied by place characteristics but not particularly attached to it, and vice versa). In addition, Jorgensen and Stedman (2006) argue that sense of place is determined via cross-dimensional relationships between place attachment, place identity and place dependence (as affective, cognitive and conative attributes of place). Moreover, Soini, Vaarala and Pouta (2012) find that sense of place is comprised of seven elements: attachment to place, rootedness, social relations, appreciation of the landscape, perceived uniqueness of the landscape, adaptability to place and landscape satisfaction. In their research, landscape plays a key role in constructing sense of place, as it does in Csurgó et al. (2023), where multiple natural, constructed,

social and cultural meanings are assigned to the landscape, dependent on socio-demographic characteristics of its residents or visitors.

The above attests to the fact that the relationship between place-related concepts, including sense of place, place identity and place attachment, are studied, but no clear agreement is yet reached on how this relationship operates. Therefore, in this study, it was decided to refer to these concepts as they are understood by the author. Figure 4.1 illustrates this understanding.

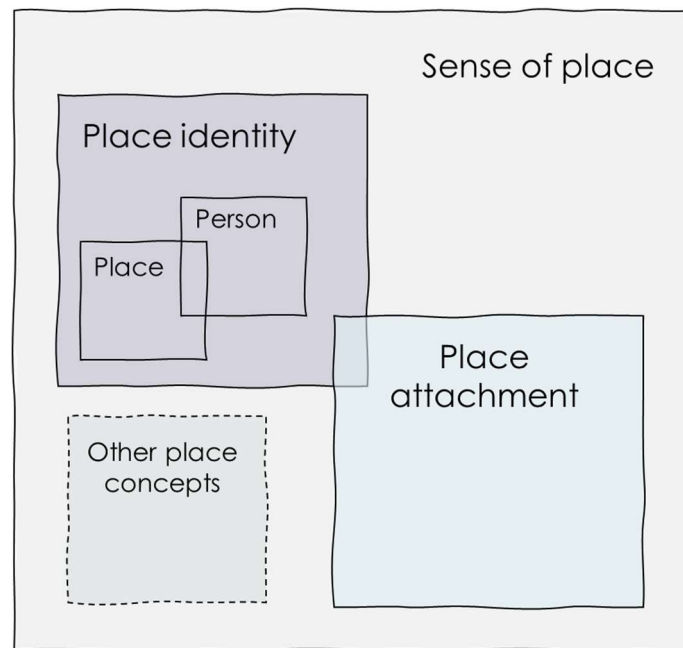


Figure 4.1: Sense of place and related concepts, as used in this study (author)

The present study regards sense of place based on meaning, that is given to the physical setting by people because of their interaction with it, rather than being embedded in the landscape and environment itself, as observed by Stedman (2003) in existing literature. Shamai (1991 p.354) defines sense of place as "feelings, attitudes, and behaviour towards a place which varies from person to person, and from one scale to another". According to Tuan (1979 p.410), "people demonstrate their sense of place when they apply their moral and aesthetic discernment to sites and locations". The sense of place can be established through physical senses (see, hear, smell, taste, touch), but it can also be *known* subconsciously (Tuan 1979). Mulvaney, Merrill and Mazzotta (2020 p.1) add that sense of place is "a social indicator that captures the relative value that different people hold for specific places". Sense of place can be

positive, negative, weak or strong, as well as individual or collective (Gillespie 2022). Sense of place also reflects “cultural, religious, historical and personal meanings of places”, with power dynamics contributing to its formulation as well, leading to it being a complex and contested concept (Chapin and Knapp 2015 p.39). Here, place attachment and place identity are seen as distinct but related concepts, whereby place attachment precedes the formation of place identity (Hernández et al. 2007). Both place attachment and place identity are compounds of sense of place (together with other concepts, mentioned in the literature), which is seen as a key aspect of placemaking (Peng, Strijker and Wu 2020).

4.2 Place and placemaking in tourism

Placemaking in tourism is manifested in tourism planning, marketing and branding activities (Lew 2017). The primary reference for this discussion is Lew (2017), who conveniently makes sense of the plethora of placemaking definitions and spelling forms by reviewing existing literature on the subject and providing a helpful synthesis. The author refers to three spelling forms⁷ and distinguishes two types of placemaking – organic bottom-up place-making, where places are ‘made’ in an unplanned and unstructured manner, as a result of the daily interaction between the place and people who use it. This type is closely linked to the sense of place concept (4.1.3), whereby values, traditions and culture are engraved into a physical space and endow it with meaning (Lew 2017). However, transforming space into place, particularly in tourism, requires the application of power, underpinned by administrative processes to warrant compliance with the desired place identity (Dredge and Jenkins 2003). Indeed, according to Lew (2017), in tourism, top-down placemaking is dominating the approaches to placemaking to a greater extent, compared to other sectors.

Top-down placemaking, is a planned and structured approach, usually by formal means (*institutions*, Chapter 2). This placemaking usually involves governments and is seen as a tool to meet mainly economic objectives, and also improve the

⁷ Lew (2017) uses three forms of spelling, associating *place-making* with the organic and *placemaking* with the planned activities, whereby *place making* is used as a generic term to describe both approached. Hereafter, the main spelling used is ‘*placemaking*’, since planned placemaking is the main concept relevant to this study.

destination's image, which in turn are expected to enhance the quality of life in the place (Lew 2017). It can be argued, therefore, that it is the high degree of involvement by government, and other stakeholders with resources and agency to develop the sector, that skew the power balance towards themselves and away from the communities. This can contribute to reducing the organic place-making and increasing the top-down placemaking, distancing even further from the needs of the community.

It is noteworthy, however, that while such an organisation of concepts is useful, it did not prevent other authors from seeking better ways to understand placemaking. Ellery, Ellery and Borkowsky (2021), for example, also acknowledge two broad types of placemaking, in relation to the direction of their imposition. However, in their findings, bottom-up placemaking can also be planned and strategic, and yet involving communities at the grassroots in its decision-making. Fincher, Pardy and Shaw (2016 p.519), nonetheless, argue that placemaking is ill-defined and when it comes to community involvement is often "language without deeds". Ellery, Ellery and Borkowsky (2021) also discussed placemaking and sense of place concepts and found that placemaking processes and results shape the sense of place positively or negatively. Thus, they argue that involvement of local communities in placemaking will create a stronger positive sense of place, thus strengthening community support for it (Ellery, Ellery and Borkowsky 2021). After all, as Fincher, Pardy and Shaw (2016 p.534) conclude, "place-making for social equity involves strengthening the inside while inviting the outside in."

Inviting the outside in is undoubtedly a core element of tourism. For it to be successful, it involves ongoing making and re-making of the destinations to maintain the image of unique and different from the usual worlds of the visitors (Dredge and Jenkins 2003). This making and re-making can be seen as placemaking. Lew (2017) argues that in tourism placemaking can be tangible, intangible and mixed, thus creating a 'tangibility scale' of the placemaking tools, as presented in Table 4.1 below.

Table 2. Tangibility scale and tools of place making.

Tangible Physical design (landscapes and builtscapes)	Mixed People practices (ethnoscapes and peopescapes)	Intangible Mental image (mindscales and storyscales)
Street furniture	Festivals and special events	Branding, marketing, advertising and public relations
Sidewalk, street width and pavement	Street life and local dress	History and heritage: famous people and events
Building architecture, height and facades	Type of shops and products for sale	Myths: fairy tales, legends, fiction novels
Plants and greenery	Foods and drinks	Social media
Building color, art and signage themes	Aural (sound) and olfactory sensations (smell)	Word of mouth reputation
Bikeways and parking	Shop advertisements	Movie and entertainment tourism
Open space: parks and plazas	Formal and informal entertainment	News stories
Public art and monuments		

Source: Appadurai (1990) on mindscales; Berleant (2003) on ethnoscapes; Rickly-Boyd (2010) on storyscales; Williams and Lew (2014) on peopescapes and builtscapes; and author.

Table 4.1: Tangibility scale and tools of placemaking (Lew 2017 p.456, Table 2)

Accordingly, placemaking elements are positioned on a scale between 'tangible' (physical aspects of industrialisation and landscape) and 'intangible' (branding and marketing), where some elements can fall anywhere along the scale, constituting 'mixed' placemaking. Tangible placemaking refers to the physical appearance of a place, which is *made* by planned top-down placemaking (Lew 2017). The mixed position, in turn, combines attributes of both tangible and intangible placemaking, and therefore has the potential to bring together planned placemaking and organic place-making. Intangible placemaking is the most prominent of all types of placemaking in tourism context, with place marketing and branding as its key elements (Lew 2017).

4.2.1 Place branding

From the plethora of placemaking processes, mentioned above, it was decided to discuss in more detail specifically the place branding concept. This is because it is seen as one of the key placemaking activities in tourism, as noted above, and is one of the most prominent in Orkney (7.2). While other placemaking processes are also evident in Orkney, and in tourism in general, such as the development of tourism infrastructure (7.1.2) or organising festivals (7.1.3), their conceptual understanding is more straightforward than the concept of place branding, and its relationship with the sense of place.

Klijn, Eshuis and Braun (2012) consider place branding as a process of governance, involving numerous stakeholders, the engagement of whom may

influence the success of the brand. Therkelsen, James and Halkier (2021) add that the end goals of place branding are dependent on the brand target audience, where the interests of local residents and short-term financial gains are in the balance. It is therefore argued that the need for short-term economic benefit can impede efforts for sustainable branding, especially in tourism, where many products depend on inherently unsustainable practices, such as highly emitting modes of transport (Therkelsen, James and Halkier 2021). This creates a dissonance between the brand and reality, depicting the place in a romanticised image that hides the problems that affect the lives of local people (7.3). Such an issue was discussed by Grydehøj and Kelman (2017 p.106) in the island tourism context, who argued:

“island communities should pursue locally contextualised development, potentially focused on climate change adaptation, rather than focus on an eco-island status that is oriented toward place branding and ecotourism”.

Nonetheless, place branding is employed by many destinations as a tactical process to secure tourism growth and value. Place branding is often built upon the place identity, in its place-centred sense (4.1.2), whereby it is used by planners to inform their placemaking vision (Peng, Strijker and Wu 2020 p.16). The attributes of the branded place identity are carefully chosen, communicating “selected functional, physical and emotional attributes of the place, thus giving it specific meaning” (Klijn, Eshuis and Braun 2012 p.500). This meaning is different from the meaning, given to a place by its people, on the basis of the sense of place (4.1.3), in that this meaning is intentional and is made with a specific purpose. According to Klijn, Eshuis and Braun (2012), this purpose usually includes economic benefits, attracting new residents, organisations, investment and visitors to the place.

Such place identity, constructed by those with the power to gain benefits, such as investment, demographic improvements and tourism development, may in fact depart from the identity created by the residents, creating social tensions. This contested nature of place identity, driven by place branding, is seen as one of the limitations of the process of place branding (Klijn, Eshuis and Braun 2012). To minimise tensions between this *purposeful* place identity, imposed top-down and used for the planned placemaking (Lew 2017), and the *organic*

place identity, it is important to include place identity visions from all stakeholders, including local residents (Peng, Strijker and Wu 2020). Indeed, Aitken and Campelo (2011 p.913) opine that place branding elements that include “authenticity, essence, equity, ownership, governance and communication” can enhance local identity and community ownership. Similarly, Jamrozy and Walsh (2008) note that a more authentic image of a place can be created by constructing it based on residents’ sense of place.

To enhance the sense of ownership of the place brand by the local community, it is argued that sense of place is a more useful underpinning for their place’s brand. Lecompte et al. (2017) note that it is common for branding practitioners to conceptualise a brand based on place identity, by recognising the unique elements of a place, whether tangible or intangible. However, as the authors explain, the ‘place identity’ concept does not provide a complete and clear definition of what must be understood and incorporated into a place brand, therefore the concept of ‘sense of place’ is more useful for this purpose (Lecompte et al. 2017). Thus, Falahatkar and Aminzadeh (2018) regard place brand as a determinant of the sense of (branded) place, based on its alignment with place identity and the needs of the place brand users. However, Campelo et al. (2013), in line with a more traditional approach, argue that sense of place is socially constructed based on the interactions between people and their place. Place brand, in this case, must be cognisant of the sense of place, to ensure it conveys its complexity and distinctiveness (Campelo et al. 2013).

Place branding is also a prominent subject in the literature on tourism in archipelagos, where it is employed as a strategy to distribute tourism benefits across the jurisdiction. The diversity of archipelago islands as an opportunity and a challenge for place branding as a strategic tool was explored by Baldacchino and Ferreira (2013), noting the difficulty of defining diversity and *plurality* of identities and histories, based not only on islands within the group but also regions, products and themes. The authors argue that often the process of understanding these differences and their effect on the branding of these small islands, and the branding itself, is conducted by central islands, and not by the small islands themselves (Baldacchino and Ferreira 2013). Recognising the differences between branding of island and continental destinations, Grydehøj

(2011) argues that disproportionately large local authorities of small island destinations often strive not only to promote their area as a tourist destination but also appeal to potential new residents and investors, creating an overall brand for the area. Such strategic aspiration can influence how islands are represented within the archipelago brand.

This branding element of tourism strategies in archipelagos is often manifested in peculiar techniques, or “tweaked representations” (Baldacchino 2015b p. 9). For example, removing islands with no access to tourists from the tourism maps in Hawaii, insisting on overall generic branding of an archipelago, without acknowledging the inter-island differences in the Canaries and altering tourism maps to represent the islands closer and similar in size than they actually are in Azores (Baldacchino and Ferreira 2013). The authors, supported by Grydehøj (2008), critique centralised top-down place branding and argue that more emphasis on the true socio-cultural identity of the islands is required to ensure effective and just usage of such diversity for sustainable destination development.

4.2.2 *Alignment between the sense of place and placemaking*

Concluding this discussion on placemaking, the last point mentioned above must be expanded on, in direct relevance to the present study. This is the element of alignment between sense of place and placemaking, and its effect on residents’ attitudes towards development.

Shamai (1991) notes that levels of participation in activities, relevant to the place are determined among other things by the strength of their sense of place. Mulvaney, Merrill and Mazzotta (2020) observe that a strong sense of place does not necessarily mean more action but is regarded as a facilitator for community participation in matters pertinent to their place, such as environmental protection activities and renewable energy development. Notably, this does not necessarily mean agreement with these developments, but stronger feelings towards events that may alter the place and create misalignment with the sense of place and its place identity component (Mulvaney, Merrill and Mazzotta 2020). Indeed, Farrell and Carr (2022) argue that it is the place identity that affects

residents' attitudes towards tourism and their levels of engagement and participation in its development.

Other authors go further and argue that sense of place (as opposed to place identity), is a key construct in residents' attitudes towards tourism, and their level of engagement and participation in tourism development. Campelo et al. (2013 p. 161) determined the constructs of the sense of place, experienced by residents of the Chatham Islands of New Zealand, which included Time, Ancestry, Landscape and Community, arguing that understanding and incorporating these into a destination brand will ensure it is "culturally cognizant and socially informed". Similarly, Lecompte et al. (2017) offer a model that links sense of place and place branding, following their study of a French coastal destination, and argue that cooperating with internal stakeholders and place users (locals and visitors) can positively contribute to attitudes and experiences. Moreover, other authors discuss sense of place in the context of sustainability transformation, arguing that it provides a useful framework for understanding the place-based sustainability goals (Grenni, Soini and Horlings 2020). It is argued that alignment of sustainability interventions, and other place-shaping⁸ actions, to the sense of place, can increase place stewardship and thus enable more sustainable relationships between people and the environment (Chapin and Knapp 2015; Masterson et al. 2017).

4.2.2.1 Place image

Another interesting concept features in many place-related studies in tourism – 'place image', sometimes also called 'destination image'. Woosnam, Styliadis and Ivkov (2020) argue that while many studies are dedicated to place image in the eyes of visitors, how residents construct place image is also crucial for understanding residents-visitors interaction. Studies on residents' place image and its impact on their support for tourism consistently show that a more positive image will lead to higher perceived benefits from tourism, thus leading to stronger support (Ramkissoon and Nunkoo 2011). Moreover, Styliadis et al. (2014), acknowledging this, observe that extant studies on the topic have also

⁸ Term 'place-shaping' is used by Grenni, Soini and Horlings (2020) and Horlings (2015) instead of place making, but the meaning, as understood from these papers, is similar.

provided several interesting conclusions regarding place image constructs in residents and visitors. They noted that residents often hold a more positive place image than visitors, explaining that the perceived uniqueness of a place may be stronger in residents rather than visitors (Stylidis et al. 2014).

In addition, according to Jamrozy and Walsh (2008), an image is a representation of a reality, applied to a destination from the outside, when the reality represented by it can be accurate, but also distorted. Other studies, therefore, acknowledged problems caused by misalignment between place image, constructed by residents, and that, displayed in place marketing materials. Bandyopadhyay and Morais (2005), for example, explore these differences in representation of the country in India's government materials and Western media, referring to the colonial nature of international tourism that contributes to an ideological conflict between locals and tourists. Consequently, it is generally agreed that an alignment of place image between residents and external actors, and avoiding disparities and 'image distortion', can support sustainable tourism development (Woosnam, Stylidis and Ivkov 2020).

Stylidis (2018) studied residents' place image to determine their place attachment, and therefore their support for tourism and intention to recommend the place, concluding that indeed there is a positive correlation between these elements. To arrive at this conclusion, and like other reviewed studies, the authors administered a survey, with pre-determined attributes of place image, taken from relevant literature and tested for validity in pilot studies. Despite the evidently rigorous approach, it yields a question of to what extent these attributes were relevant to the specific place and specific community (its layers of context), and whether other place attributes could have been included, if an opportunity to determine these was given to the participants themselves.

Nonetheless, Stylidis (2018), supporting Ramkissoon and Nunkoo (2011), argues that residents with more positive opinions about their place image (based on those pre-determined attributes) tend to express stronger support for tourism development, reasoning that such support is caused by higher alignment of the development with the said image. This argument, however, paints a somewhat confusing picture of the relationship between the concepts. On the one hand, place image seems to drive support for tourism development, but on the other

hand tourism development is expected to be aligned with the image to increase residents' positive attitudes towards it in the first place (Stylidis 2018; Devine-Wright and Howes 2010). Woo, Kim and Uysal (2015), who explored the relationship between residents' perceptions of quality of life and their place image, found the relationship to be *bilateral*. This can confirm the increased importance of residents' perceptions of their place and their life, as it affects and is affected by tourism development, becoming a building block for the sustainability of the destination.

However, to add depth to this cause-and-effect relationship, the term 'place image' could be replaced with other place concepts, when used in relation to residents. Limited studies went beyond place image and included other place concepts in their quest to find why residents support or reject tourism development. Ganji, Johnson and Sadeghian (2021) explored the relationships between place attachment and the perceived value of tourism, translating into support for tourism development. Smale (2006) argues, however, that place attachment can only help to understand *which* places are important, and not *why* or *how* they are important. A value approach, therefore, can provide a more in-depth understanding of what people find important in their place, and underpin place-based approaches to sustainability implementation (Horlings 2015).

It can be seen, therefore, that alignment between residents' sense of place and how the place is represented in placemaking activities has a significant influence of residents' perceptions on tourism, their participation in decision-making, and ultimately their support for tourism overall. This is discussed in more detail below.

4.3 Residents' perceptions

It is widely argued that the success of tourism development hinges on the support of local residents (Deery, Jago and Fredline 2012), therefore understanding what drives residents' perceptions of tourism's positive or negative impacts has captured academic attention for over four decades (Sharpley 2014). The exploration began with renowned models, such as Doxey's (1975) Irridex and Butler's (2006) Tourism Area Lifecycle (TALC), as well as

Smith's tourist typology (Sharpley 2014). This exploration continues to this day, with 596 studies published in 2020-2023⁹, of which 179 were published in 2023 alone.

Many of these studies are underpinned by, or at least reference, Social Exchange Theory, which, in the tourism context, suggests that residents' support for tourism development is positive when benefits from tourism are perceived to be higher than costs (Ap 1992). While undoubtedly relevant, the use of this theory to explain the drivers for residents' support has fallen under some critique, most notable of which is its inability to explain *why* the residents perceive the benefits and costs as they do (Deery, Jago and Fredline 2012; Sharpley 2014). It is argued here that this can be rectified by exploring the subject of 'value', which is also based on benefits and costs, but provides a deeper understanding of the reasons behind their perceptions. The following sections discuss these approaches.

4.3.1 Social Exchange Theory

Social Exchange Theory (SET), introduced by Emerson (1976), is often used in the tourism context to explain the relationship between locals and visitors (Nunkoo and Ramkissoon 2011). Ap (1992) began to use SET for this purpose, to consider how perceived positive and negative impacts of tourism by the host community affect the social exchange between the actors, ultimately translating into support for tourism development. The theory suggests that high perceived benefits and low perceived impacts/costs influence positive interaction of residents with tourists (and vice versa), i.e. positive attitudes of residents towards tourism to their destination (Rasoolimanesh et al. 2015). For the exchange to be balanced (both parties benefit from it), it must be rational, fair, reciprocal and satisfactory, otherwise, the exchange will not take place (Sharpley 2014). Ap (1992) also explains that the exchange between locals and visitors is underpinned by power, a degree of which is determined by the balance between resources given and received. Thus, the actor who has more resources, needed

⁹ Scopus database search of "*resident* perceptions*" OR "*resident* attitudes*" OR "*community* perceptions*" OR "*community* attitudes*" AND "*tourism*" on 24 December 2023.

by their counterpart (e.g. money to pay for tourism services), has a higher degree of power, if the exchange is imbalanced (Ap 1992).

Prior to Ap's (1992) proposition to utilise SET for host-visitor relationship in tourism, Perdue, Long and Allen (1990) investigated what factors, apart from *personal* benefit, influence residents' attitudes towards tourism development in rural destination. The authors found that perceived benefits and impacts on the destination overall, as well as the perception of the general state of the rural economy, affect the degree of support for further tourism development (Perdue, Long and Allen 1990). Interestingly, Nunkoo and Ramkissoon (2011) also found that perceived benefits had a stronger influence than perceived costs on the level of support for tourism development. Indeed, many studies confirm that the perceived benefit from tourism development is the strongest predictor for the level of residents' support for this development (Vargas-Sánchez et al. 2015), especially in its economic form (Dyer et al. 2007). Moreover, Nunkoo and Ramkissoon (2011) reported that power plays a direct role in residents' attitudes towards tourism development, whereby more power to influence decision-making leads to stronger support, confirming the relevance of SET principles for this inquiry.

However, some authors argue that SET in its original form, whereby residents' perceptions of benefits and costs of tourism development results from the exchange between these actors, does not adequately explain these relationships (Rasoolimanesh et al. 2015). The critique largely amounts to the unclear and ambiguous meaning of the nature of the exchange (what is being exchanged) and what influences these perceptions. Therefore, numerous studies were conducted to build on SET principles and advance understanding on what drives the residents' perceptions (see Gursoy, Jurowski and Uysal 2002; Nunkoo, Gursoy and Juwaheer 2010; Rasoolimanesh et al. 2015). The factors tested in these studies include geographical context and self-identity (Nunkoo, Gursoy and Juwaheer 2010), place identity (Wang and Chen 2015; Wang and Xu 2015), place image (Stylidis et al. 2014), community concern, utilisation of tourism resources and ecocentric values (Rasoolimanesh et al. 2015; Gursoy, Jurowski and Uysal 2002; Jones, Jurowski and Uysal 2000), trust in tourism institutions (Nunkoo and Ramkissoon 2011) and even altitude of residence (Apollo et al.

2020). Moreover, residents' involvement in tourism planning and management is found as an influencing factor (Rasoolimanesh et al. 2015), but distance from tourism activity returned mixed results, with fewer studies looking at the resident/visitor ratio (Deery, Jago and Fredline 2012). The destination development stage, based on Butler (2006), was also tested, revealing some differences between residents' attitudes towards tourism (Vargas-Sánchez et al. 2015). Many of these studies were repeated across different contexts with many contradictory results (see Nunkoo and Ramkissoon 2011).

In addition, in earlier studies, Perdue, Long and Allen (1990) looked at the influence of residents' sociodemographic attributes, including length of residence, age, sex, education level and employment status, ultimately rejecting the influence of these attributes on residents' perceptions. However, sociodemographic attributes were explored extensively since then, and age was determined as an influencing factor by Rasoolimanesh et al. (2015). Age, however, was not confirmed as a factor in support for adventure tourism development, nor the education level (Chakrabarty and Sadhukhan 2019). A set of sociodemographic attributes was also tested by Almeida-García et al. (2016), albeit in mature urban destinations, where age and level of education were found as influencing factors, as well as 'nativeness' and length of residence. 'Nativeness', however, was not found to have a significant effect on residents' perceptions in Rasoolimanesh et al. (2015) study. Jones, Jurowski and Uysal (2000) studied the relationship between sociodemographic factors, environmental position and support for tourism development, and found a significant correlation between these factors.

This plurality of conclusions on the effect of sociodemographic characteristics and other factors can be explained by the fact that each of these studies was conducted in different contexts, without sufficiently considering specific and unique characteristics of the destination and the studied community of residents. Indeed, it is argued that SET with its linear and, somewhat idealistic, approach (both parties are interested and actively engage in the exchange) does not reflect reality, ignoring social and cultural contexts and different interaction levels between hosts and visitors (Sharpley 2014). This limitation can be attributed to the methods, employed in these studies, which are predominantly

quantitative, as was noted by several authors (Sharpley 2014; Deery, Jago and Fredline 2012; Ngo and Pham 2021). Deery, Jago and Fredline (2012) explain that SET usually produces a list of artefacts (i.e. influencing factors), tested as variables via quantitative technique. The authors acknowledge that within a community there is a “variety of perspectives towards tourism and these perspectives will emanate from individuals’ values and societal norms, among other influences” (Deery, Jago and Fredline 2012 p.71). Therefore, qualitative approaches might be more appropriate to form a deeper understanding of each individual case and advance knowledge beyond a list of artefacts toward explaining *why* (Sharpley 2014). Yet, some authors argue that taking a qualitative approach will jeopardise the generalisability of such studies to a wider context (Sharpley 2014; Ngo and Pham 2021). Based on the above, however, the results of the existing quantitative studies are also not generalisable to other places, because of the complexity of different contexts, diversity of communities and groups, sociodemographic characteristics and a variety of needs and values. Therefore, a qualitative approach can prove more useful for such studies.

4.3.2 Value

In his seminal work on conceptualising value, Brown (1984) identifies three types of value as distinct but interlinked concepts. He proposes to distinguish between (1) ‘held’ values, which are modes of conduct or desired qualities and ideals, held by a person; (2) ‘relational’ values, where those are felt by individuals driving preference of one object over another in a particular context; and (3) ‘assigned’ values, which are the reflection of the importance of an object to a person, as a function of the person’s perceptions, person’s held values and preferences and a context of the valuation (Brown 1984). The author emphasises, that *the* value does not exist, since assigned value is relative, perceived and context-dependent (Brown 1984). Value, therefore, can be seen as a place-based concept, and thus merits a place-based approach for its understanding (Grenni, Soini and Horlings 2020).

Indeed, the Oxford Dictionary defines value, in its *assigned* sense, as “the quality of being useful or important”, which is synonymous with the word ‘benefit’ (Oxford Learner's Dictionaries 2023). Despite the dictionary definition demonstrating that value or benefit does not have to be financial, there is a

significant difference between the two, directly related to the subject of this work. Another definition, distinguishing between value and benefit, is found in the fields of project management and commerce, developed by the Office of Government Commerce (OGC) in their Management of Value (MoV) programme for organisations and projects (Office Of Government Commerce 2010). According to this definition, value is provided by the delivery of benefits and the use of resources to gain those benefits. Thus, value is a proportionality between the perceived benefits (or, satisfaction of needs) and the cost (financial and/or other) incurred. Figure 4.2 illustrates this relationship.

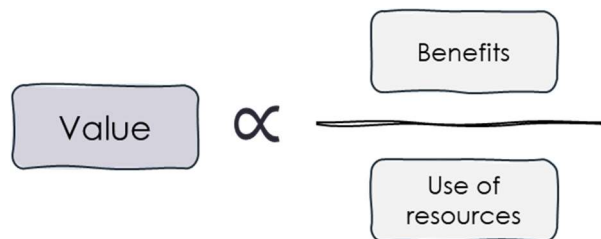


Figure 4.2: Value as proportionality between benefits and used resources (author after Office of Government Commerce 2010, p.5)

According to this approach, in support of Brown (1984), value is subjective, and the assessment of whether 'good' value is obtained will be unique to each individual and their circumstances. In marketing, value is usually regarded as "[...] the consumer's overall assessment of the utility of a product based on perceptions of what is received and what is given" (Zeithaml 1988 p.14), again relating the definition to perceived benefits and costs. However, it is also noted that such a simplified definition of value (as a ratio between benefits and costs), has come under critique for being narrow and unidimensional, and is in fact more complex than merely 'utility' or 'desirability' (Sánchez-Fernández and Iniesta-Bonillo 2007). In tourism, Woo, Kim and Uysal (2015) note that 'value' gradually ceased to be a purely economic term, with the wellbeing and quality of life of local residents becoming associated with the perception of value of tourism development.

In tourism literature, the concept of value is usually discussed in relation to tourists, as a marketing theory, whereby value creation is seen as an integral part of customer loyalty, business competitiveness and, therefore, profits (Sánchez-Fernández and Iniesta-Bonillo 2007). The explicit use of the term

'value' in relation to residents, however, is very limited (Ganji, Johnson and Sadeghian 2021; Woo, Kim and Uysal 2015), albeit its antecedents (benefits and costs) and their perception by residents is extensively explored (4.3). To this end, as discussed previously, SET studies usually aim to ascertain residents' attitudes to gauge their support for tourism development, as a destination sustainability indicator. While important, *understanding* value as opposed to measuring attitudes can support a more meaningful evaluation of tourism development strategies, not only from a community perspective but also by recognising how (and if) the perception of value differs between stakeholders with different levels of power to set the strategic direction. After all, as noted above, power plays an instrumental role in shaping the perceptions in the exchange relationships (Ap 1992). This, in turn, leads to an understanding of whose perception of value drives the strategic planning, and what this means for sustainable tourism development. While the cost/benefit equation remains at the basis of this 'value' approach, it merits a more qualitative in-depth study, that can consider a variety of value determinants, affecting both perceived costs and perceived benefits.

The subject of value is directly related to the strategic planning theme, central to this study. The 'Value over volume' principle is increasingly used by destinations to respond to the ever-growing concern of negative impacts from tourism and is reflected in tourism strategies worldwide. Ozturk and van Niekerk (2014), for example, explore nine strategic plans for tourism development in Turkey through Butler's (2006) TALC model and reveal that the 'value over volume' message is more prominent as the destination goes through its consolidation phase.

Importantly, however, the authors confirm that they, as well as the discussed strategic plans, define 'value' as an economic contribution, measured by visitors' spending (Ozturk and van Niekerk 2014). To this end, Tribe and Paddison (2023) reviewed seventeen national strategies from across the world and concluded that such a traditional model of strategy-making, emphasising economic growth, is still prevalent in the majority of the documents.

Nonetheless, and seemingly stepping away from a purely economy-driven strategy, the new Tourism 2050 strategy by New Zealand emphasises "balanced growth where tourism is a flourishing and growing industry that contributes to

people, place and culture” (Tourism Industry Aotearoa 2023 p.6). Although the strategy does not explicitly use the term ‘value over volume’, it is evident that it strives to shift the strategic direction from pursuing solely economic growth to using tourism for sustainable and regenerative development.

A different, wider definition of value is evident in the Faroe Islands’ “Join the Preservolution” sustainable tourism strategy (Visit Faroe Islands 2019). It sets out ‘Quality over Quantity’ as its cornerstone, explaining:

“An increasing number of visitors only makes sense if we manage to get more value from each visitor and to attract the right type, all year round. This will ensure a more sustainable and responsible growth, where tourism pays better dividends to society. A solution is to put emphasis on quality-conscious tourists that wish to interact with locals and take part in authentic tourism experiences, and who are willing to pay for these services.” (Visit Faroe Islands 2019 p.20)

As evident from this strategy, ‘value’ is used as a synonym for ‘quality’, compared to ‘volume’ or ‘quantity’. However, as Sánchez-Fernández and Iniesta-Bonillo (2007) observe, some argue that ‘value’ is distinct from ‘quality’, whereby the perception of quality *leads to* the perception of value. Therefore, value is a more comprehensive and individualistic concept, constructed of the perception of quality, which on its own does not involve a trade-off between benefits and costs (Zeithaml 1988).

Bhutan is another noteworthy example, known for its commitment to developing high-value, low-volume tourism, as was noted by Tribe and Paddison (2023). Bhutan’s Prime Minister, Lotay Tshering, explained that for Bhutan ‘high value’ does not mean hi-end products and luxury accommodation, but a *high-value society*, “infused with sincerity, integrity and principles, where people must always live in safe communities, among serene environments and derive comfort from the finest facilities” (TTG Asia 2022). This definition can be seen as an expansion of the Quality-of-Life concept, as used in Woo, Kim and Uysal (2015) study. The authors explored the relationship between residents’ quality of life and the perceived value of tourism development and found that the relationship is bilateral, where a higher perceived value of tourism caused a better quality of

life, which in turn caused a more positive perception of further tourism development (Woo, Kim and Uysal 2015).

This confirms the importance of the concept of value (beyond the benefits and costs ratio) for strategic planning for sustainable tourism development. To be sustainable, what the community values about their society and their quality of life must be reflected in strategic plans for tourism development, to gain community support and positive attitudes towards it. These community values, however, are context-dependent, as well as subject to a variety of factors in play in any given community, not least in island destinations. As Nunkoo, Gursoy and Juwaheer (2010 p.687) warn, “when deciding on their research design, researchers should be cautious about the heterogeneous, diverse and complex nature of the populations in some islands, as well as the different forms of tourism development taking place there”.

As was seen in previous sections on residents’ perceptions, many studies asked residents to rank pre-determined sets of indicators. However, following the critique of these methods, presented earlier, a qualitative interpretive approach might be useful. It can help to ascertain what the residents themselves value in their lifestyle, their place and tourism, by involving the residents in defining what are the determinants of high value for their community, individually and collectively. It could be argued that the framework for such an approach can be the Optimal Value Framework (OVF), developed by The Travel Foundation (The Travel Foundation 2023), based on Hartman and Heslinga (2022) Doughnut Destination model. The framework helps destinations to engage with tourism stakeholders to “understand and optimize the value of tourism for their community” and determine the strategic actions “that increase the benefits of tourism in the destination and minimize the cost or negative impacts of tourism to the destination” (The Travel Foundation 2023 p.1). According to the framework, values are explored in economic, societal, cultural, environmental and individual (mental) domains, allowing stakeholders to prioritise them based on positive and negative impacts. A ‘safe space’, ‘critical zone’, thresholds and limits are then identified (Hartman and Heslinga 2022), and a list of priority impact areas, optimal value and measurable indicators are established, to be

incorporated into the strategic planning for the destination (The Travel Foundation 2023).

However, this can also be done by understanding the sense of place and its relationship with place value in a specific context, as proposed by Grenni, Soini and Horlings (2020). The advantage of such an approach is that it takes into account both outer (physical) and inner (sense of place) spheres, that impact the perception of value, assigned to the place, which, in turn, can inform publicly supported placemaking and contribute to sustainability transformation (Grenni, Soini and Horlings 2020). In addition, it can be emphasised that values can be assigned not only to a place, as proposed by some other studies (Grenni, Soini and Horlings 2020; Plieninger et al. 2018; Hanrahan, Maguire and Boyd 2017) but to the placemaking processes themselves, such as tourism development, as will be seen in this study.

4.4 Conclusions

This chapter discussed the theoretical aspects of place and its relationship with people who inhabit it, introducing the most relevant concepts of place – place attachment, place identity and sense of place. It illustrated that the complexity of definitions and interpretations of these concepts is profound, and the need to establish an understanding was explained. As such, it underpinned the decision to use the concept of sense of place in this study, as a focal point for place-related discussions, encompassing within it place attachment and place identity (in both person-centred and place-centred senses). In Chapters 6-8, it will be demonstrated that considering only place attachment or only place identity is insufficient to *understand* the reasons for residents' perceptions of tourism and sustainability.

From the theoretical discussion on place and its concepts, the chapter proceeds to discuss placemaking, as an activity or process that creates places from mere spaces, in an organic way, or employing planned goal-orientated activity. The concept also demonstrated its complexity, where a variety of factors, actions and contextual circumstances influence the nature of these placemaking processes. Here, two main elements can be highlighted, relevant to the subsequent discussion. First, the element of power plays a key role in

placemaking and its results. Those with the power to plan and realise placemaking will have their needs and objectives met, often leaving those without those privileges behind, or even marginalised. Second, to avoid such disparity, the placemaking element must be aligned with the sense of place of the communities, who call the place home, to reduce inequalities, secure participation and improve residents' perceptions of the placemaking outcomes. To expand on this topic, residents' perceptions, underpinned by the social exchange theory, were discussed.

Numerous studies were conducted to determine the causes of residents' perceptions of tourism benefits and impacts, tourism value and their support for tourism development. A decisive majority of these studies conclude that positive attitudes towards tourism are obtained when benefits from tourism are perceived as higher than the costs or negative impacts, in line with SET. However, the studies that have expanded on SET and included other parameters, obtained less conclusive results. This is with limited exception of studies that explored place image and identity, as a determinant for tourism value perceptions, which was found as an important factor in their shaping. The limitations of the reviewed studies were identified in applying pre-determined attributes of place image, quality of life, place attachment, benefits and costs, without considering the context of the destination and complexities of its social structures. Moreover, it is not clear if these pre-determined attributes align with what the residents themselves see as important constructs of their sense of place. The existing studies provide very limited acknowledgement of the fact that people's attitudes and intentions are driven by a variety of symbolic meanings, derived from the same place (Chapin and Knapp 2015).

These limitations of using SET as a conceptual framework were found useful for this thesis. As such, this study addresses three main limitations, namely (a) employ qualitative methods of enquiry (Chapter 5), expanding on the existing body of research; (b) consider Layers of Context (LoC) model (Chapter 2) to determine the contextual setting, in which Orkney residents' perceptions are formed; (c) employ place theory (this chapter) to understand the factors affecting these perceptions. This approach will allow considering sub-division and cross-cutting within and between complex and heterogeneous communities,

including differences in culture and perspectives, driven by a variety of sociodemographic factors (Deery, Jago and Fredline 2012 after Jordan 2009).

Addressing these limitations will contribute to bridging the research gaps, identified from the discussion so far. By summarising the literature review, presented in Chapters 2-4, it can be argued that the studies, conducted to date, do not sufficiently address the complexity of contextual circumstances, uniquely affecting each destination. This was confirmed in Chapter 2, where the application of the Layers of Context (LoC) model (Figure 2.1) allowed for systematic analysis of the pertinent contextual features of Orkney Islands, before the in-depth analysis of their unique manifestation in Orkney (Chapters 6-8). It was also confirmed that studies in the context of cold-water islands and archipelagos are limited, thus providing a strong rationale for the choice of Orkney Islands as a case study (1.2, 5.2.2). Chapter 3 expanded the understanding of how the base layers of the LoC model manifest in the tourism context, emphasising the complex nature of the tourism industry and its development in small rural island and archipelago destinations. Due to this complexity and its context-dependent manifestation in local destinations, the existing tourism strategy evaluation frameworks were reviewed. It was, consequently, argued that the current literature has not yet sufficiently addressed place-based sustainable tourism strategy evaluation on a local destination level, one that would consider the specific context of such a destination. Chapter 4, consequently, reviewed the contextuality of tourism development through the lens of place and explored factors that affect residents' perceptions of tourism development in their place. From this discussion, a limitation of the existing literature was recognised in form of lack of in-depth qualitative studies, that consider contextual circumstances, as noted above. Thus, a place-based sustainable tourism strategy evaluation framework is required to address the context-specific sustainability needs of a local destination, which will be done in this study.

This concludes the literature review part of this thesis, and methodological considerations will be discussed next, before proceeding to the analytical chapters.

CHAPTER 5

Methodology

“Critical tourism studies scholars are not a homogenous group; they range from activist champions and critical analysts, to theorists, to passionate igniters of hope – the last category representing those academics who are fully aware of the problems faced by the communities they study but choosing to focus on finding pragmatic solutions” (Pernecky 2020, p.660).

The above quote illustrates the researcher’s positionality in this study, where knowledge of a problem for the sake of knowledge itself will make only a limited impact, and actionable knowledge can create more benefits. This position indicates the philosophical stance that underpins this research, discussed in this chapter, and the methodological approach the study takes as a result. This chapter will also introduce the research design, including the chosen methodological approach, the initial conceptual framework and methodological reflections following the changes the framework has undergone during this study. It will address any applicable ethical considerations and discuss in detail the data collection and analysis processes.

5.1 Philosophy

Diversity of the tourism industry as a research subject, and the subjectivity of tourism experience, are discussed in academic literature as arguments that shift

from positivism, frequently employed in tourism research, to more broad philosophies is needed (Walle 1997; Hollinshead 2006; Ainley and Kline 2014). It is discussed that tourism, traditionally based within social sciences, includes a varied range of disciplines, from economics and management to politics, sociology, history, geography and anthropology (Downward and Mearman 2004). With this variety of subjects embedded in tourism studies, it is argued that a 'new' research approach should be taken, incorporating reflexive, value-driven and critical ways of thinking (Ateljevic et al. 2005).

According to Riley and Love (2000, p.165), other social disciplines have already accepted qualitative approaches as an alternative to the "master paradigm' of positivism". Walle (1997) also provides marketing as an example of a discipline utilising such approaches to manage a variety of problems within the industry, arguing that tourism follows the same path. Thus, qualitative methods are employed in complex social settings when an understanding of a certain phenomenon is required, and context and natural environment are vitally important for this understanding (Riley and Love 2000). Often associated with interpretivism as a philosophy underpinning this approach, qualitative methodology allows researchers to interpret or "make sense" of subjective positions regarding what is being researched (Saunders, Lewis and Thornhill 2019, p.179).

However, qualitative methodology has received some degree of critique. The main disadvantages of this approach can be seen in what in effect makes the advantages of a positivist/quantitative one. These include the production of non-generalisable, subjective knowledge, difficulty in making predictions, time-consuming analysis, and lower credibility for financial and administrative decision-making (Johnson and Onwuegbuzie 2004). It is also argued that a significant problem of the qualitative approach is the failure to justify the applicability and soundness of chosen methods, which often results in misinterpretation and confusion (Stoffelen 2019).

Nonetheless, while conducting the literature review, the pilot study and refining the research aim and objectives, it was concluded that a qualitative approach would be more appropriate (5.2). Yet, it is believed that pragmatic philosophy provides a valid guide for this research, and, despite the interpretive nature of

the chosen methodology, pragmatism as a philosophical standpoint is better suited to guide this study. The next subsections will provide an additional review of interpretivism and pragmatism as philosophies that both can be seen as applicable to this study, as well as critical discussion on the appropriate approach.

5.1.1 Interpretivism

Ontologically, interpretivism means that reality is understood and perceived differently by different individuals (Veal 2017), where the nature of reality is complex, involving a mix of processes, experiences and practices, socially constructed by the cultural context of the individual (Saunders, Lewis and Thornhill 2019). Researching such complex topics as sustainable tourism and sense of place, understanding and interpreting the realities is seen as crucial for achieving the aim of the research. Moreover, conducting interpretive research goes beyond causal relationships between concepts of the study, and looking at their manifestation in the specific context (Chowdhury 2014). In the case of the present study, and as noted by tourism scholars (for example Adie, Amore and Hall 2020; Butler 2018; Hardy and Pearson 2016), understanding and considering context is vitally important.

However, in addition to understanding the phenomenon, this research aims to create a practical solution to a complex context-dependent problem. To meet this challenge a pragmatic approach must be taken.

5.1.2 Pragmatism

Pragmatism is a relatively new philosophy, which considers “theories, concepts, ideas, hypotheses and research findings not in an abstract form, but in terms of the roles they play as instruments of thought and action, and in terms of their practical consequences in specific context” (Saunders, Lewis and Thornhill 2019, p.151). Among other characteristics, it strives to find workable, practical solutions and a compromise between philosophy and action, it views reality and knowledge as influenced by action experienced by humans, recognises the natural and physical world as important, promotes pluralism and eclecticism, and takes value-driven research approach (Johnson and Onwuegbuzie 2004). Valid knowledge, according to pragmatism, not only relies on applying theory and

logic but on real-world experience and a useful, practical solution for real-world issues (Veal 2017).

Based on the above, a pragmatic philosophical position can be beneficial for this research. As evident from its aim and objectives (1.4), the study seeks to create a practical solution to a contemporary real-world problem, as well as advance the knowledge in the theoretical realm, as opposed to creating knowledge as a sole purpose. However, in tourism research pragmatism is seen as a philosophical underpinning in mixed method application (Veal 2017), and only limited examples of positioning solely qualitative research in pragmatism were identified (see Haid, Albrecht and Finkler 2021). Nonetheless, this idea was advanced more substantially in other disciplines, such as information systems (Goldkuhl 2012) and organisational research (Kelly and Cordeiro 2020), therefore can be considered for tourism research as well.

Goldkuhl (2012) argues, however, that both interpretivism and pragmatism paradigms are driven by knowledge creation, however, interpretivism values the knowledge itself, whereas pragmatism uses it as a tool for change. Table 5.1 demonstrates the proposed comparison between interpretivism and pragmatism.

	<i>Pragmatism</i>	<i>Interpretivism</i>
<i>Ontology</i>	Symbolic realism	Constructivism
<i>Empirical focus</i>	Actions and changes	Beliefs (socially constructed cognition)
<i>Type of knowledge</i>	Constructive knowledge	Understanding
<i>Role of knowledge</i>	Useful for action	Interesting
<i>Type of investigation</i>	Inquiry	Field study
<i>Data generation</i>	Data through assessment and intervention	Data through interpretation
<i>Role of researcher</i>	Engaged in change	Engaged in understanding

Table 5.1: Pragmatism vs interpretivism: ideal-typical differentiation (Goldkuhl 2012, p.142, Table 1)

Among other differences, the author suggests that the “scientific knowledge from pragmatic research should also be valuable for practices outside the studied ones”, connecting scientific and practical knowledge for the benefit of specific and general practices (Goldkuhl 2012, p.141). Such knowledge can be seen as action knowledge, that, guided by pragmatism, enables to study of a variety of opinions and positions of different participants (Kelly and Cordeiro 2020).

It can also be noted from Table 5.1 above, that pragmatism implies that the researcher is engaged in change, as opposed to mere understanding (Goldkuhl 2012). Pragmatism also enables the adoption of a reflexive approach based on the specific context of the study and can guide the refinement of research objectives, decide on appropriate methods of data collection and analysis, as well as identify participants who can best contribute their practical knowledge and represent a variety of opinions (Kelly and Cordeiro 2020).

That said, it is possible to combine elements of pragmatism and interpretivism in a single qualitative study. Goldkuhl (2012) argues that research can adopt a main paradigm and draw on specific elements from another paradigm to enrich it. Therefore, the present study, adopting pragmatism as a base research philosophy, allows for interpretive elements, such as the interpretation of social constructs and participants' worldviews (Chapters 6-8). Arguably, one can accept that mixing principles of two philosophical stances, similar to mixing methods or data sources, can also be seen as a pragmatic approach to achieving the objectives of research. With this understanding, the methodological approach can now be discussed.

5.2 Methodology

Guided by the chosen philosophical position, a multi-method qualitative approach was adopted to meet the objectives of this study. Qualitative approach is becoming more prominent in tourism research (5.1). As argued by Sharpley (2014) and Deery, Jago and Fredline (2012), a qualitative approach can help unravel the complexity of residents' perceptions of tourism benefits and impacts, casting a brighter light on the reasons behind their attitudes towards tourism development, which is one of the objectives of this study (1.4).

Guided by pragmatism and elements of interpretivism, this study employs an inductive approach to achieve its aim. Inductive research is driven by the data collected, and theoretical explanations are derived from its analysis (Saunders, Lewis and Thornhill 2019). In such research, the process begins with a research question and, guided by a conceptual framework established during the preliminary literature review and exploratory discussions, uses the themes arising from the data analysis to answer the research question (Veal 2017). As

explained later in this chapter, the conceptual framework is there to assist with the empirical phase of the research, as opposed to being empirically tested and confirmed in a chosen context. However, a deductive element to this study will be added in 9.2, where the final evaluation framework, derived from the inductive analysis, will be applied to the Orkney Tourism Strategy as a case study.

5.2.1 Case study research

According to Yin (2018 p.15), a case study is “an empirical method that investigates a contemporary phenomenon (the “case”) in depth and within its real-world context, especially when the boundaries between phenomenon and context may not be clearly evident”. The author defines several features of case study research, such as the technical distinctiveness of a studied situation with many variables, the merit of developing theoretical propositions prior to conducting the empirical phase (conceptual framework) and using different data sources for the triangulating analysis (Yin 2018). Gerring (2006, p.19) adds that the “case” is a “spatially delimited phenomenon (a unit) observed at a single point in time or over some period of time”, where the geographical boundaries are usually more prominent than temporal.

Despite the appropriateness of this type of research design to the discussed study, it is noteworthy that case study research is exposed to some amount of critique, mainly on the generalisability of the results, inability to go beyond an exploration of a phenomenon, researcher’s bias and confusion with non-academic cases (Yin 2018; Flyvbjerg 2006). Particularly in tourism, Xiao and Smith (2006, p.747) indicate that tourism research is characterised by an overabundance of case study research, “stereotypically perceived as atheoretical, area-specific, one time, and not following methodological procedures”.

Nonetheless, as Xiao and Smith (2006) conclude in their publication, the focus of any critique of case study research should not be about how often such an approach is taken or whether it is theoretical enough, but more about its methodological application, constructively improving its quality. As for the generalisation capacity of case study research, Yin (2018, p.37) argues that it

merits “analytic generalisation” (from a case study), rather than “statistical generalisation” (from a case), using lessons learnt to enrich theory and shed light on similar situations.

5.2.2 Orkney as a case study

The selection of specifically Orkney as a case study for this research can also be seen as “pragmatic/opportunistic” (Veal 2017, p.403), driven by the good availability of published information, access to potential participants via the university’s connections in Orkney, as well as personal interests of the researcher. Moreover, to address the literature gaps regarding local, context-dependent strategy evaluation, Orkney provides a unique case, where the contextual features are both rich and understudied (2.4).

It was also decided to conduct this study as a single-case study, although studying two cases was initially considered. According to Veal (2017, p.402), one of the merits of conducting a case study, in addition to what was already discussed above, is “the ability to treat the subject of study as a whole, rather than abstracting a limited set of pre-selected features”. This means that instead of conducting two case studies on a more superficial level, due to limited resources available to a student to conduct this research (also acknowledged by Yin (2018) and Saunders, Lewis and Thornhill (2019)), one in-depth analysis was performed. This allowed for a deep, holistic understanding of a studied subject in a complex context (Yin 2018; Wang and Ap 2013; Wray 2011; Dubois and Gadde 2002), which created more value for theoretical development and practical contribution. Moreover, as Baldacchino (2006a p.186) notes, “every island is unique”, so their understanding will benefit from an in-depth single case study.

Indeed, Stratford et al. (2011) argue that islands are not mere sites of investigation, but a model for understanding. Here, Orkney is not just a ‘case’ but a model for recognition of the specific context, in which it exists, where relationships between places and people are unique, complex and dynamic. Furthermore, the uniqueness of such relationships does not prevent from using this knowledge in advancing understanding of archipelagos, which can become a *model* for it, by means of learning from their inhabitants, producing knowledge

"with, from and for them", as opposed to "about and on" (Stratford et al. 2011 p.114). Importantly, as discussed in Chapter 4, the reality of this relationship must be "clarified and understood from the perspectives of the people who have given it meaning" (Tuan 1979 p.387). Therefore, this case study employs qualitative interpretive methodology and emphasises the voices of the participants in the presentation of the analytical discussion (5.5.1).

5.2.3 Digital (ethnography)

Before proceeding to the research strategy for this case study, it is worth noting its methodologically applicable connection to the field of digital ethnography (Pink et al. 2016). The primary aim of this study sets it apart from traditional definitions of ethnography, that is studying a culture or a social group (Saunders, Lewis and Thornhill 2019) using an array of methods, such as participant observation and interviews, and "involving direct and sustained contact with human agents, within the context of their daily lives (and cultures), watching what happens, listening to what is said, and asking questions" (O'Reilly 2009, p.3). While this study involves interviews and observations, as will be discussed further in this chapter, and while an in-depth understanding of Orkney as a destination is based on conversations with members of local communities, this study does not aim to study these communities as subjects of this research. Instead, the primary subject of this study is the strategy and the applicable processes around it, affecting and affected by the local community.

However, some aspects of ethnographical methodology, such as learning about the Orkney community to supplement the in-depth understanding of Orkney as a destination, and in particular the digital ethnography methods, have been useful in this study. Digital ethnography is explained by Pink et al. (2016) as ethnography that uses digital technological advances to allow practising the methodology in new ways, taking into account digital environments and tools to obtain an ethnographic understanding of the studied subject. According to the authors, the digital aspect of such methodology does not only mean studying digital worlds (online environments, such as forums or games), digital interactions (such as emails, social media) or digital tools (such as the use of mobile phones in certain communities), and nor does it mean that it is compulsory to use digital research tools for such studies. On the contrary, one

can study a digital community or environment using non-digital methods, or employ digital methods to study a subject that is not primarily embedded in or contextualised by its digital environment (Pink et al. 2016).

This latter situation is seen as applicable to this study, and it is deemed important to emphasise the role of digital research methods and tools in this project. While in any contemporary research some use of digital tools will always be present, including digital journals and books, search engines and databases, such as Scopus or Google Scholar, the present study employs digital technology for its data collection and analysis to a greater extent. Two methods in particular must be discussed – using Zoom/MS Teams to conduct the interviews and using digital photography as a note-taking tool during observations.

Pink et al. (2016) note that in digital ethnography the contact with participants is often mediated by a digital medium. Indeed, as will be discussed in 5.4.1 below, 28 out of 31 interviews in the main data collection phase were conducted using Zoom/MS Teams, recorded (with informed consent from all the participants, see 5.6) and subsequently transcribed from these videos, assisted by Panopto (5.5). This allowed the researcher to reach out to the participants more effectively, due to greater scheduling flexibility, and ask the questions more efficiently, thus putting participants at ease, contributing to a more engaged and informative conversation. For example, sharing a screen to show specific pages of the studied strategy for participants to reflect on, instead of putting a burden on participants to read the relevant pages beforehand, print them out or have them prepared in any other way. Moreover, in one instance, the informed consent process took place during a recorded Zoom session, effectively recording this consent digitally, rather than a paper copy of the consent form.

Pink et al. (2016, p.3) also note, that “ethnographical writing might be replaced by video, photography or blogging”. In line with this idea, as well as the pragmatic stance of this study to find the most appropriate methods of gathering information to reach the aim of the research, digital photography was employed during observation field trips to Orkney by the researcher, as a main medium of gathering rich data, in addition to note taking (also digital). This approach will be described further in 5.4.2.

In addition to these two digital aspects of the data collection, all the auxiliary processes throughout the research were almost exclusively reliant on digital tools. From literature search and access via online databases, libraries and publishers to making contacts with participants via LinkedIn, Facebook and/or emails – much of this study was conducted digitally. This is of course with the notable exception of physical travel to the destination, in-person interaction with locals and visitors during those trips, conducting three interviews in person, using a small number of physical books in the literature review and in-person presence on the university campus and in supervisory meetings when COVID-19 restrictions allowed.

5.3 Conceptual framework

Conceptual framework is one of the most important elements in any research (Veal 2017). The rationale for devising a conceptual framework for a study is that by organising the relevant concepts and defining relationships between them, such a framework can guide the study by narrowing down research questions and objectives (Durberry 2018), defining propositions to inform the data collection and analysis (Yin 2018), building hypotheses (Dul and Hak 2007) and provide a foundation for the entire study (Wang and Ap 2013).

The conceptual framework may combine exploring theoretical and practical sources of information to decide on study propositions (Yin 2018; Dul and Hak 2008). In addition, Yin (2018) suggests that conducting a pilot case study can be beneficial for developing data collection tools (such as interview questions) as well as clarifying the conceptual framework, devised from theory and practical material review. The conceptual framework for this study was derived from the literature review, the pilot study and the existing generic evaluation frameworks, discussed in 3.3, as follows.

5.3.1 Pilot study

Conducting a pilot case study is seen as beneficial for further development of the protocol of the main study (Yin 2018). As Saunders, Lewis and Thornhill (2019) advise, pilot study helps clarifying additional data requirements, duration of the questionnaire (or interview), clarity of supportive documentation, such as

consent forms and project briefs, as well as quality standards for access negotiation and interview conduct.

In addition to the methodological reasons, the purpose of the pilot study was to enrich the researcher's knowledge in the general context of the Scottish tourism industry, similar to "exploratory discussions" mentioned by Saunders, Lewis and Thornhill (2019, p.183). In particular, it was decided to learn more about the national tourism strategy – Scotland Outlook 2030 (SO2030) (Scottish Tourism Alliance 2020), and its relevance locally, in Aberdeenshire. Therefore, seven pilot interviews were conducted between May and August 2021 with tourism industry stakeholders in Aberdeenshire, on regional and national levels.

Aberdeenshire on the local level was chosen due to "convenience, access and geographic proximity", as advised by Yin (2018, p.107). While, in line with the main argument of this thesis, it is acknowledged that understanding the contextual circumstances of Aberdeenshire will not be able to assist in understanding the context of Orkney, the pilot discussions were able to provide a broader understanding of tourism industry in Scotland on national, regional and local levels – a useful exploratory step, especially given that the researcher had limited involvement in tourism industry in Scotland prior to this study. Conducting these discussions in and about the area that is familiar to the researcher, as well as having access to the stakeholders who were willing to contribute, confirmed the applicability of Aberdeenshire for the purpose of the pilot study.

Table 5.2 includes the key information on these interviews¹⁰.

¹⁰ PI – Pilot Interview

Code	Organisation	Interview date	Sector	Questionnaire
PI-01	STA	27/05/2021	Private	Strategy Makers
PI-02	Visit Aberdeenshire	01/06/2021	Public/Private	General
PI-03	VisitScotland	11/06/2021	Public	Mixed
PI-04	Braemar Community Limited	17/06/2021	Third/Private	General
PI-05	SENScot	27/07/2021	Third	General
PI-06	Aberdeenshire Council	28/06/2021	Public	General
PI-07	Cairngorms Partnership	12/08/2021	Private	General

Table 5.2: Pilot interviews (author)

The interviews were conducted online via recorded Zoom (6 interviews) and MS Teams (1 interview) calls. The length of the interviews varied between 45 minutes to 1 hour and 15 minutes. Two types of interview questionnaires were used in the pilot, one with more generic questions about opinions about SO2030 and the post-pandemic 'new normal' of the tourism industry in Scotland (Appendix 3). The second questionnaire, Strategy Makers, included more technical questions on the strategy development process and was used in interviews with stakeholders who directly participated in SO2030 development, which provided a strong background to this strategy evaluation research (Appendix 4).

Following their completion, the interviews were transcribed and uploaded into NVivo software. The text was then coded using open coding technique (Corbin and Strauss 2008). The purpose of this initial coding was to organise and restructure the data (Stoffelen 2019), as well as identify concepts and emerging themes (Veal 2017). Following this initial stage, the codes were reorganised into concepts (for example emergent themes of COVID-19 challenges and opportunities were organised under the concept of 'new normal') and the data was reviewed again and 'coded-on' where required. This resulted in full data coding and organisation of the interviews' text into relevant themes and concepts, ready for analysis.

These exploratory discussions with Scottish and Aberdeenshire tourism industry stakeholders provided the researcher with an in-depth understanding of the industry, especially in such turbulent times of the COVID-19 pandemic, increasing the researcher's confidence in the studied subject. Moreover, the knowledge gained in these conversations underpinned several questions, used in the interviews of the main study about Orkney, contributing to understanding of the following topics:

- (a) Sustainability and sustainable tourism definitions by local residents.
- (b) Post-pandemic 'new normal' in the tourism context (see 5.7.2 for changes in the inclusion of this topic in the analysis).
- (c) Strategy-making process and its implementation.
- (d) Stakeholder engagement, in particular community engagement.
- (e) Tourism governance on national and local levels.

In addition to the industry knowledge, the pilot study contributed to the researcher's technical skills in conducting interviews, underpinning the preparation for the main study. To this end, the pilot study showed the duration of the majority of the interviews exceeded the initially planned 30-45 minutes. The interviews were then extended as required, with the participants' consent to continue. Thus, the interviews in the main study were planned for 45 minutes, with a contingency time of additional 15 minutes. As these are semi-structured interviews, the discussed topics may expand beyond the prepared script, therefore setting a contingency time will be beneficial. The technical aspect of online interviewing was useful as well, allowing the researcher to gain experience in facilitating semi-structured interviews in this online environment, as well as managing online recordings, transcription and usage of the NVivo software for coding and thematic analysis.

The consent form was also trialled during this pilot study. All participants consented to use their name, position and organisation in any research outputs, however, it was highlighted by one of the participants that the views they expressed were their own and not a formal position of their organisation. This was addressed in the updated consent form, used in the main study (Appendix 13). A participants' log was also created, in which the relevant consent preferences were recorded during both pilot and main studies.

5.3.2 Building the conceptual framework

Following the analysis of the pilot interviews, the initial conceptual framework was prepared, to guide the subsequent stages of the study. Importantly, as this research takes on a qualitative, inductive approach, this conceptual framework provided the initial basis for the study and was expected to evolve during the data collection and analysis phases (Veal 2017; Dubois and Gadde 2002). This conceptual framework synthesises the relevant sustainable tourism and strategy evaluation literature (3.3) and lessons learnt from the pilot interviews (5.3.1) into a *provisional* evaluation framework to guide the data collection. Appendix 5 includes the full framework and Figure 5.1 provides its visual illustration.

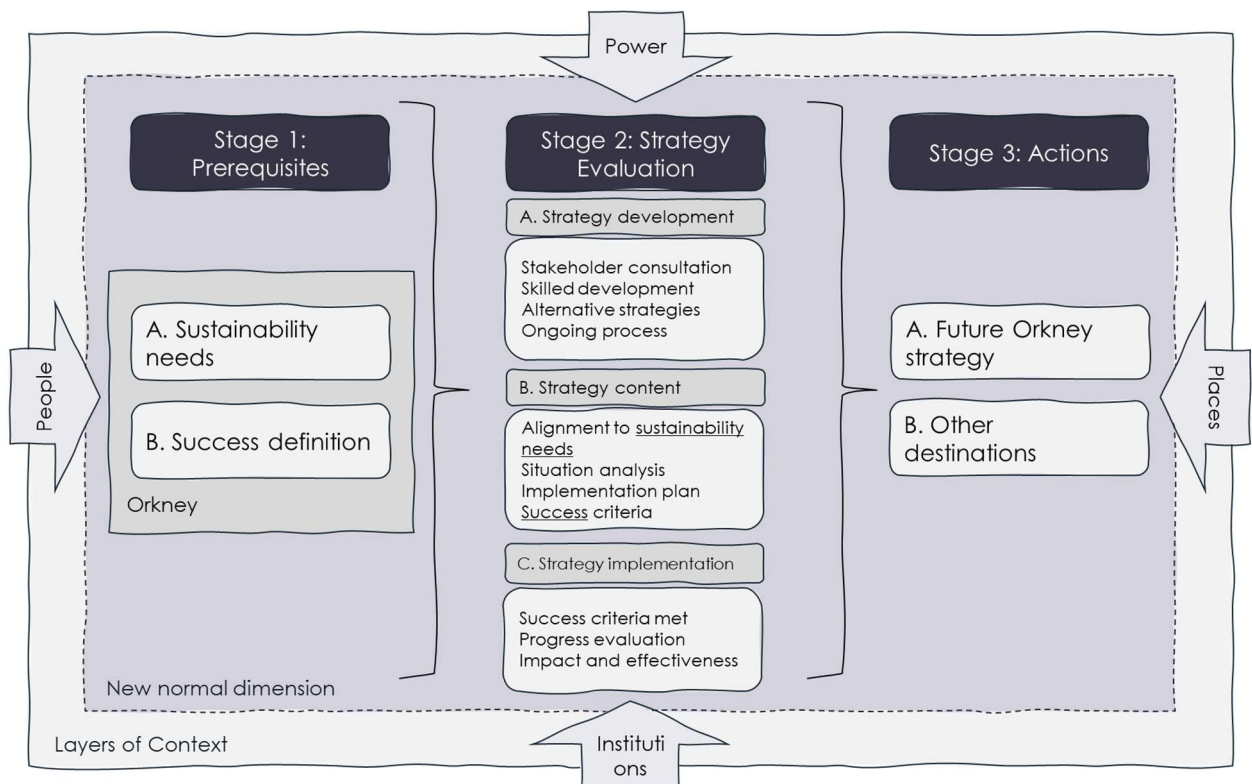


Figure 5.1: The Conceptual Framework (author)

To ensure that all relevant information from these sources is included in the framework development, it was decided to apply coding to the relevant texts in NVivo (Corbin and Strauss 2008). The process of coding and cataloguing the data allowed organising its outcome (the codes) into sections and sub-sections, as illustrated in Figure 5.2 below.

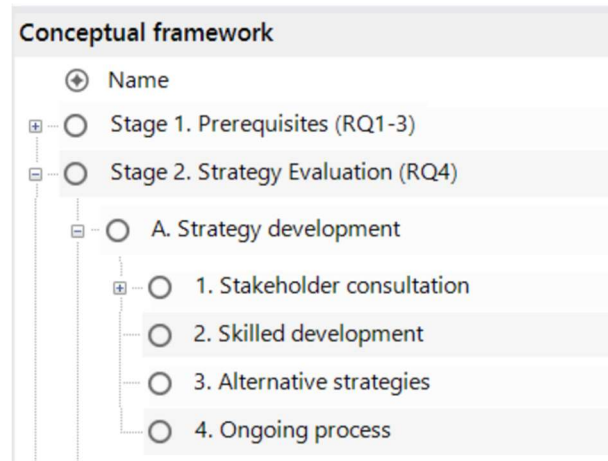


Figure 5.2: Example of the NVivo coding structure (author from NVivo)

This coding structure was then used to structure the Strategy Evaluation criteria (Appendix 5), which were derived from the coded information per each category. For example, the quote “A process exists for checking the accuracy and appropriateness of destination promotion and information” (Global Sustainable Tourism Council 2019, p.6) was coded into “Marketing” code, and adapted to evaluation criteria “EC68: Does the strategy include/reference process for assessing relevance and accuracy of marketing materials?”.

As was noted in the previous section, some requirements for strategic planning were repeated in different sources, most commonly stakeholder engagement, strategic long-term vision and sustainability needs. On the other hand, some requirements were mentioned only in specific sources. Therefore, this coding process allowed for recognising similarities and differences and incorporating all the relevant requirements into a single list of evaluation criteria. Figure 5.3 below illustrates an example of the Evaluation Criteria structure and its alignment with the coding structure in NVivo.

1	2	3	4	5	A
1	Evaluation Criteria				
2	Stage 1. Prerequisites (RQ1-3)				
31	Stage 2. Strategy Evaluation (RQ4)				
32	A. Strategy development (<i>max. score = 10</i>)				
33	1. Stakeholder consultation				
34	EC1: Was the stakeholder map developed prior to consultation?				
36	EC2: Was there a sufficient stakeholder consultation process?				
43	2. Skilled development				
48	3. Alternative strategies				
51	4. Ongoing process				
56	B. Strategy content (<i>max. score = 176</i>)				
203	C. Strategy implementation (<i>max. score = 24</i>)				
232	Stage 3. Recommendations (RQ5-6)				

Figure 5.3: Example of the provisional Evaluation Criteria structure (author)

However, it is important to note that following the export of the NVivo structure, a number of minor adaptations were made to ensure readability and usability. For example, it was decided to include 'QA and accreditation' and 'Wider Policy Integration' as separate themes, in addition to 'Policy framework', and not as its sub-themes. In addition, some evaluation criteria were added, from the literature review and preliminary discussions, such as themes 'Success criteria met' and 'Implementation progress' in the Strategy Implementation domain, which were not created initially in the coding structure.

In the planning stage of this study, the purpose of this conceptual framework and its Evaluation Criteria was twofold. Firstly, it aimed to establish propositions for this study (Yin 2018; Dul and Hak 2008), which are the *provisional* Evaluation Criteria (EC) derived from academic and industry literature (discussed in 3.3). During the first stage of the data analysis (Stage 1: Prerequisites), these evaluation criteria were planned to be reviewed and updated to tailor them to the specific context of Orkney Islands. Secondly, the proposed evaluation criteria, together with the prerequisite information, allowed for determining what data needs to be collected to tailor the framework to Orkney and to perform the evaluation itself (Stage 2: Strategy Evaluation). The evaluation according to those tailored Evaluation Criteria was planned to inform the analytic generalisation to wider contexts, as well as provide recommendations for subsequent strategies in Orkney (Stage 3: Recommendations).

However, despite the rigorous formulation process of this framework, and its value for the preparation of interview questions (5.4.1.3), the Evaluation Criteria and the evaluation approach were found not useful for Orkney strategy evaluation, due to the results of Stage 1 of the study (Chapters 6-8). This is discussed in more detail in 5.7.3. This initial framework also referred to the New Normal – post-pandemic context of the Strategy, which was later deemed less important for this study (5.7.2). Layers of context, however, played a crucial part in it, as well as elements of people, place and power (linked to the element of institutions).

5.4 Data collection

As mentioned previously, one of the merits of case study research is the ability, even necessity, to use multiple sources of information to reach its objectives (Yin 2018; Veal 2017; Wang and Ap 2013). For this case study, the data is gathered via interviews and observations, to inductively inform the strategy evaluation framework, used for analysing the Orkney Tourism Strategy. To address the Orkney layer of context (Figure 2.1), it was decided to interview members of Orkney communities and its tourism stakeholders, to understand how they define sustainability in the Orkney context, and what drives their attitudes on tourism development in Orkney. However, the tourism stakeholders did not include visitors to Orkney, since the aim and the objectives of this study were to determine the sustainability needs of Orkney by those who reside there and are directly affected by sustainability benefits and impacts of tourism to their destination.

The information gathered from these sources is organised in a case study database, to ensure a “separate and orderly compilation of all the data from a case study” (Yin 2018, p.131). This is done to improve the reliability of the case study research and provide the opportunity to the reader of a final report (in this case - thesis) to review the raw data in conjunction with interpretations and conclusions (Yin 2018), should this be required. For the purpose of this project, NVivo software was used as a database. The following sub-sections will explain each data source.

5.4.1 Interviews

Semi-structured in-depth interviews with industry stakeholders were used to obtain primary data for the study, the purpose of which is “guiding responses but without closing down avenues of explanation that might arise in the dialogue” (Beedie 2018, p.87). This is the main method of data collection for this study, supported by observations (5.4.2). The interview checklist was developed in line with the research questions and objectives, guided by the conceptual framework and lessons learnt from the pilot study, conducted during the first phase of the project (Yin 2018). This semi-structured method of data collection is especially valuable when the obtained information is expected to be different from subject to subject (Veal 2017).

5.4.1.1 Sampling

The main data collection for this study included 31 semi-structured interviews with 32 Orkney tourism stakeholders (one interview was conducted with two people simultaneously). The interviews included people with different levels of involvement in the tourism industry, enriching the study and providing a deeper understanding of the complex context of tourism development (Farmaki 2015). The study sample of interviewees was identified using a purposeful sampling technique for the initial respondents, and snowball sampling where key informants suggested additional participants (Veal 2017). The purposefully sought participants included the strategy-makers (1.2.6) - members of Destination Orkney Partnership from the following organisations¹¹, presented in Figure 5.4 below.

¹¹ Scottish Natural Heritage (now NatureScot) withdrew from the partnership in early 2022, and therefore their representative did not participate in the interviews. Instead, a participant from joint project between NatureScot and RSPB was recruited, to shed light on the position of environmental organisations, active in Orkney.

- Destination Orkney (Ltd), representing members of the tourism industry
- Orkney Islands Council
- VisitScotland
- Highlands and Islands Enterprise
- Historic Environment Scotland
- Scottish Natural Heritage

Figure 5.4: Destination Orkney Partnership members (Destination Orkney Partnership 2020, p.5)

In addition to the strategy-makers above, specific groups of stakeholders were also purposefully sought (such as farmers, nature protection organisation, participants from non-Mainland location etc.), where additional participants were identified by asking recommendations from existing participants in a snowball technique. Therefore, once the information from a certain group of stakeholders was gathered and was deemed sufficient to enrich the understanding, the researcher could concentrate on other groups. If the data were deemed insufficient, further participants from the group were approached. It was also important to include participants from public, private and third sector organisations, however meeting this objective was difficult due to the availability of participants and further complication of multiple occupations (5.4.3).

However, it was not expected to reach *data* saturation in this element, meaning “degree to which new data repeat what was expressed in previous data” (Saunders et al. 2018, p.1897). In other words, the “heard it all” conclusion was not sought (Morse 2015), nor a “complete description of all aspects of the phenomenon” (Malterud, Siersma and Guassora 2016, p.7), since the variety of opinions among a large number of stakeholders could be infinite when the opinions could vary among groups, individuals, professions, locations or any external factors (such as different stages of COVID-19 pandemic). Instead, it was important to collect rich data from a variety of participants representing different groups of stakeholders to allow for saturation, as defined by Morse (2015, p.587), where saturation of “characteristics within categories” is achieved to understand the phenomenon and “enlighten” the researcher. Thus, the data gathered allowed the researcher to contribute to the understanding of the phenomena with these new insights by drawing conclusions and general

understandings within the categories, instead of individual cases (Morse 2015; Malterud, Siersma and Guassora 2016). Therefore, the goal was not a specific number of interviews, but rather a variety of stakeholder groups, based on their occupation, degree of involvement in the tourism industry, as well as location and origin.

As discussed in section 5.6 below, it was decided to maintain the anonymity and confidentiality of all participants, regardless of their consent to disclose personal information, such as name, organisation and role in it. Therefore, the attributes of the participants, presented in Table 5.3 below, include their main occupational sector and degree of involvement in tourism industry, instead of stating their organisation or business. This has not only ensured anonymity and confidentiality of the participants, residing in a small community and working closely together, but also allowed to accommodate instances where participants explicitly stated that they present their individual views and opinions, and not that of their organisation.

Code	Location	Tourism involvement	Main sector	Origin	Questionnaire
MI-01	Orkney Mainland	Directly	Public	Incomer	SM_01
MI-02	South Ronaldsay	Indirectly	Public	Incomer	ALL_01
MI-03	Orkney Mainland	Indirectly	Public	Incomer	SM_01
MI-04	Orkney Mainland	Directly	Public	Incomer	SM_01
MI-05	Orkney Mainland	Indirectly	Public	Native Orcadian	SM_01
MI-06	Orkney Mainland	Indirectly	Public	Incomer	SM_01
MI-07	Non-Orkney	Directly	Public	N/A	NAT_01
MI-08	Orkney Mainland	Directly	Third	Incomer	ALL_01
MI-09	South Ronaldsay	Directly	Private	Incomer	ALL_01
MI-10	North Ronaldsay	Indirectly	Public	Native Orcadian	ALL_01
MI-11	Orkney Mainland	Indirectly	Public	Native Orcadian	ALL_01
MI-12	Orkney Mainland	Directly	Public	Incomer	ALL_01
MI-13a	Westray	Directly	Private	Native Orcadian	ALL_01
MI-13b	Westray	Directly	Private	Native Orcadian	ALL_01
MI-14	West Mainland	Directly	Private	Incomer	ALL_01
MI-15	Orkney Mainland	Indirectly	Public	Incomer	ALL_01
MI-16	Kirkwall	Directly	Public	Incomer	ALL_01
MI-17	Orkney Mainland	Indirectly	Private	Incomer	ALL_01
MI-18	Kirkwall	Indirectly	Private	Native Orcadian	ALL_01
MI-19	East Mainland	Indirectly	Private	Returning Orcadian	ALL_01
MI-20	Orkney Mainland	Indirectly	Public	Incomers	Mixed
MI-21	East Mainland	Indirectly	Private	Returning Orcadian	ALL_01
MI-22	Kirkwall	Indirectly	Private	Native Orcadian	ALL_01
MI-23	Orkney Mainland	Directly	Private	Incomer	ALL_01
MI-24	West Mainland	Indirectly	Private	Native Orcadian	ALL_01
MI-25	Shapinsay	Directly	Private	Incomer	ALL_01
MI-26	Hoy	Not involved	Third	Returning Orcadian	ALL_01
MI-27	Orkney Mainland	Directly	Private	Incomer	Mixed
MI-28	West Mainland	Wants to be involved	Private	Incomer	ALL_01
MI-29	West Mainland	Not involved	Public	Returning Orcadian	ALL_01
MI-30	Orkney Mainland	Indirectly	Third	Incomer	ALL_01
MI-31	Non-Orkney	Indirectly	Private	N/A	Mixed

Table 5.3: Main study participants

Summary of participants' attributes is presented in Appendix 9, and more details on the interviews themselves can be found in Appendix 10. Information on the interview questionnaires is presented in section 5.4.1.3 below.

5.4.1.2 The participants

Sociodemographic characteristics were not explicitly sought during data collection; however, origin and location played a key role in this thesis. It, therefore, was important to note these attributes (see Table 5.3 above), which was done by asking "please tell me about yourself" before the thematic discussions. All participants referred to their place of residence, i.e. which island of Orkney they live in. However, those residing in the Mainland did not always specify which part of the Mainland, therefore more specific location was noted in the attributes only if it was provided by the participant. The information on the origin was provided by the participants themselves in the discussion narrative or by answering a direct question.

At the design stage of the study it was important to record the location of the organisation/individual the participants represented ('local', 'regional', 'national', 'global'). However, some participants, representing national and regional organisations (MI-03 to MI-06) themselves reside locally, so it was decided to classify them as 'local', since they are members of the Orkney community for the purpose of this study. As discussed in 5.7.1, as the data analysis progressed, it became apparent that concentrating on the voices of members of local communities, in all degrees of involvement in tourism, is most suitable and useful to achieve its aim and objectives. The conversations with the national/global participants (MI-07 and MI-31), therefore, were used to enrich the researcher's understanding but were not used in the data analysis, presented in this thesis (apart from limited input into Orkney Strategy evaluation in 9.2).

Participants who consented to disclose their industry/organisation were often employed in additional types of businesses or organisations, in addition to the tourism sector. This is in line with Baldacchino (2012 p.112), who argued that "role diffusion", "role enlargement" and "role multiplicity", such as working beyond one's job description, under loose supervision, and having more than

one occupation, is common in small island jurisdictions. Table 5.3 above, therefore, illustrates the primary occupation as a degree of involvement in the tourism industry ('directly', 'indirectly', 'wants to be involved', 'not involved'), whether through primary occupation or not.

5.4.1.3 Data requirements

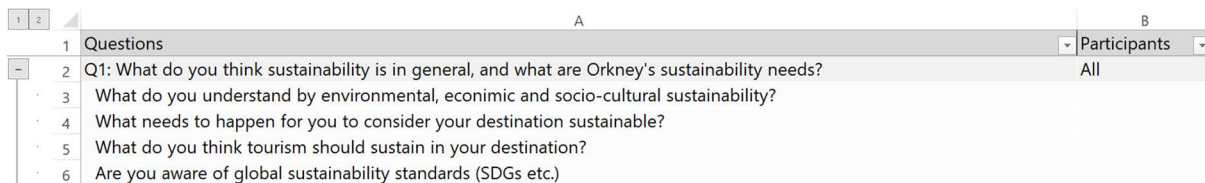
Participant categories were created to account for the fact that not all the participants will be able to provide information on all topics. Therefore, it was decided to allocate the participants into three categories – Strategy Makers (SM), national-level stakeholders (NAT), and everyone else (ALL). Interview questionnaires were developed accordingly for each group, and presented in Appendices 6-8. Table 5.3 above, as well as Appendix 10, demonstrate which questionnaire was used for each interview. In some interviews mixed questionnaires were used, such as an interview with a Destination Orkney Limited representative, to deepen the understanding of all the processes, pertinent to the Strategy development. Moreover, a separate questionnaire was prepared for the consultant, who advised Destination Orkney Partnership on the Strategy update post-COVID (see 5.4.3 for reflections on including non-Orkney stakeholders). This is because of the higher value of these interviews due to the position of the participants and their role in the strategy-making process, and the objective to obtain as much useful information as possible to understand the strategy-making process and enrich the in-depth knowledge of Orkney as a destination.

The questions to guide the semi-structured interviews were developed using the conceptual framework (5.3.2), where under each Prerequisite theme and Evaluation Criteria, detailed 'data requirements' entries were added, as illustrated in Figure 5.5, where lines 45-47 demonstrate such data requirements entries (see Appendix 5).

	A	B	C
1	Evaluation Criteria	E	Interviews
2	Stage 1. Prerequisites (RQ1-3)		
31	Stage 2. Strategy Evaluation (RQ4)		
32	A. Strategy development (<i>max. score = 10</i>)		
33	1. Stakeholder consultation		
43	2. Skilled development		
44	EC3: Was the strategy developed by an appropriately skilled team?	Y	
45	Who was responsible for the development of the strategy?		SM
46	Why they were chosen to do so? What relevant skills they have?		SM
47	Who do you think should be responsible for the strategy development?		All

Figure 5.5: Example of the 'data requirements'

The framework also specified which participants category should be asked for this information. All data requirements entries, including their participant category, were then transferred to a separate list where the final interview questions were developed, by consolidating the data requirements entries into an overarching open question for discussion, using the original entries as prompts. Figure 5.6 below shows an example of a question.



	A	B
1	Questions	Participants
2	Q1: What do you think sustainability is in general, and what are Orkney's sustainability needs?	All
3	What do you understand by environmental, economic and socio-cultural sustainability?	
4	What needs to happen for you to consider your destination sustainable?	
5	What do you think tourism should sustain in your destination?	
6	Are you aware of global sustainability standards (SDGs etc.)	

Figure 5.6: Example of an interview question

The questions were then filtered by participant category and collated into a separate list for each category, where questions marked 'All' were added to all the lists. The interview questions can be found in Appendices 6-8. Although this process allowed for deriving a defined set of questions for the interviews, it is important to note at this point that due to the semi-structured nature of the interviews, the questions were used only as a guide and prompts for the conversations.

5.4.1.4 Process

The interviews were conducted between January and September 2022, with 28 out of 31 interviews being conducted online via Zoom or MS Teams. Appendix 10 includes the interview details. The interviews lasted on average just over an hour, with the shortest being around forty minutes and the longest just over one hour and a half. Since the interview questionnaires were prepared as a guide only, allowing flexibility in interview direction, some conversations were directed by the participants themselves. For example, during the conversation with MI-23, only the first question was asked ('what do you think sustainability is and what are Orkney's sustainability needs?'). This prompted the participant to speak for the extended duration of the interview about various issues, ideas and events relevant, in the participant's opinion, to the topic. From the researcher's

perspective this was also deemed as an important and valuable insight into Orkney's unique layer of context (Figure 2.1), allowing for understanding the power dynamics between various stakeholders, certain legacy processes relevant to the strategy making, and the context of sustainability outwith and within the tourism industry in Orkney. Interview MI-22 presented a similar challenge, as well as an opportunity, to learn more about contextual features of Orkney, albeit not fully covering the prepared topics for discussion.

The two conversations noted above were participant-driven to a greater extent than others, however majority of the conversations brought up topics that were not initially included in the questionnaires. It is worth noting one particular topic that was not explicitly included in ALL or SM questions – the topic of community. Although the questionnaires prompted to ask about community involvement in strategy decision-making and whether the strategy objectives fitted local community values, after the first interview it was decided to add the questions 'Can you describe/define Orkney community?' and 'What does community mean to you?', which made a significant contribution to the researchers understanding of Orkney's context.

All interviews were recorded, with online interviews recorded in both video and audio files, and in-person interviews were recorded as audio files only. Following the completion of each interview, the recordings were uploaded to Panopto¹², which was used by the researcher to assist with transcription. All interviews were transcribed verbatim, and participants' names were anonymised by replacing the name with the assigned code MI-01¹³ to MI-31, with the participants from the interview MI-13 were assigned codes MI-13a and MI-13b, since they participated in the interview together. A sample of the interview transcript is presented in Appendix 11. All transcripts were then uploaded to the NVivo database for subsequent analysis (5.5).

Given the information power and richness of the collected data (Malterud, Siersma and Guassora 2016), the researcher was satisfied that the number of

¹² Panopto is secure platform for creating video content, which offers caption generating function, that became the basis for the transcription.

¹³ MI – Main Interview

interviews conducted was sufficient for the purpose of this study. However, to increase the validity and reliability of the data, information from an additional data source – unstructured observations - was gathered.

5.4.2 Observations

“Interviews with individuals provide the pieces of the jigsaw and these pieces are then fitted into the ‘picture on the box’ which is gained through observation.” (Mulhall 2003, p.308)

While interviews were the main source of primary data for this research, it was decided to include an observational element, where an observer seeks to enrich their understanding of the studied subject, develop explanations and complement or illustrate the data gathered via another method, such as interviews (Veal 2017; Yin 2018; Mulhall 2003). In this study, it was decided to conduct two unstructured observations at different points of the study, as discussed later in this sub-section. According to Mulhall (2003, p.307), an unstructured observation:

- provides insight into interactions between dyads and groups.
- illustrates the whole picture.
- captures context/process.
- informs about the influence of the physical environment.

Such observations are in contrast to structured observations, associated mainly with positivist philosophy, conducted against predetermined protocols (Veal 2017; Mulhall 2003), instructing what to observe and when, often applying quantitative analysis to the findings (Veal 2017). In this study, the purpose of the observations was to observe the context and the physical environment and illustrate the themes discussed during interviews. In line with the interviews, an interpretive stance was taken to the observations, when the researcher aimed to interpret the behaviours or situations described by participants (or experienced by the researcher herself, as addressed further in this section).

Due to their inductive nature, the observations allowed the researcher to explore the case study flexibly, to gather rich data for the analysis. Moreover, contemporary, real-world setting of case study research, direct observation can become an integral part of the research (Yin 2018). This supports an interesting

point conveyed by Donmoyer (2000, p.63) that case study research “allows us to look at the world through the researcher’s eyes and, in the process, to see things we otherwise might not have seen”. Dubois and Gadde (2002) also note that observations can expose new data and encourage new questions for the interviews in case study research. Therefore, two field trips were made to the case study area, as follows:

Trip	Dates	Areas visited	Type
Trip 1	11 th July 2021 – 21 st July 2021	Orkney Mainland, Hoy, Westray, Papa Westray, South Ronaldsay	Exploratory
Trip 2	18 th June 2022 – 30 th June 2022	Orkney Mainland, Rousay, Sanday, South Ronaldsay	Illustrative

Table 5.4: Orkney field trips (author)

Trip 1 was conducted before the data collection began, following the decision to use the Orkney Islands as a case study. The purpose of the trip was to explore the physical area, visit the main attractions, understand the geography, weather, and transport links and experience the destination from a visitor's perspective. The gained knowledge and understanding helped the researcher during the interviews when participants would refer to certain locations or environmental conditions, to express confidence and knowledge in the discussed topics, thus gaining trust and rapport with participants for richer information collection (Malterud, Siersma and Guassora 2016). In addition, it was planned to make connections with members of local communities for potential participation in the interviews. This trip was conducted during the COVID-19 pandemic when travel restrictions were temporarily lifted following the second lockdown.

Trip 2 was conducted towards the end of the data collection, with the purpose of conducting a number of face-to-face interviews and obtaining illustrative material to support data already collected during interviews. Following the conversations during this trip, two additional participants were recommended, interviews with which were later conducted online to complete the main data

collection. Moreover, since this trip took place after COVID-19 restrictions were ultimately lifted, it was important to compare the case study area with the previous visit during the pandemic, when no cruise ships were allowed and the tourism sector was maintained by independent visitors, albeit in smaller numbers as well. This allowed a clearer comparison between the situations with and without volume visitors, and reduced number of independent visitors, as well as restrictions on the local population. Thus, a number of differences could be observed, such as the return of cruise ships, busier attractions, the return of festivals and a generally larger number of people on the streets (Chapter 8). These observations, among others, were recorded via photography and field notes, as discussed below and added to the case study database in Nvivo for analysis.

5.4.2.1 Photography

As was noted in 5.2.3, photography can be seen as a digital method of ethnographic writing (Pink et al. 2016). In this study, a large number of digital photographs (as well as videos) were taken during both field trips to Orkney, using both professional DSLR camera and the researcher's iPhone. The researcher took photographs of anything she deemed of interest both to her memory and understanding of Orkney as a place where people travel, live and work, and to illustrate topics or situations discussed during interviews. This resulted in over one thousand raw photos from each trip, to which the following inclusion and exclusion criteria were applied:

Exclusion: Duplicates and most photos of nature, landscape and visitor attractions' interior, except for only to illustrate certain areas or sites.

Inclusion: all photos where the following features were present: streets (busy or quiet), pavements (busy or quiet), car parks (busy or quiet), roads (wide or narrow, busy or quiet), interpretation and information materials on sites, sites themselves (busy or quiet), paths (conditions), transport (cruise ships, ferries, buses etc.), features that illustrate Orkney community (such as mobile library, 'blackening' wedding tradition, containers on the ferry, or items in Kirkwall library).

This sorting process resulted in 98 photos from the first trip and 224 from the second trip included in the database. Basic metadata for each photo was also recorded and included date and time of when it was taken, location and camera used. This information was included in the NVivo classification sheet, which can be found in Appendix 12. The difference in the number of photos from relatively similar trip is because Trip 1 was the first trip for the researcher to Orkney, not just as a researcher but as a visitor. Therefore, it meant that the trip was more of an exploratory, 'touristic' nature, where the researcher took less purposeful account of the trip, with more emphasis on getting to know the destination, its people, places and landscapes. This resulted in more photos that didn't fall into the inclusion criteria noted above. Trip 2 had a more purposeful nature, when the researcher had more specific needs to document, such as anchorage of a cruise ship, streets and carparks (that interviewees often mentioned) etc. Nonetheless, results from both the exploratory and the illustrative trips were found invaluable to complement the main data collection.

It is important to reiterate here, that taking photographs was not the primary objective of the observation phase, but only the means to chronologically and accurately document the observed material (similar to how a pre-digital researcher would write a detailed field journal). The majority of these photos were not included in the final thesis or any publication but were used by the researcher to write up her field notes and add to the final analysis together with the data gathered from other sources. This is important not only methodologically, but also from the ethical considerations' perspective, namely participants' informed consent matters. This is discussed in 5.6.1.3.

5.4.2.2 Field notes

As Mulhall (2003) explains, ethnographers usually approach field note writing in one of these two ways: field notes as a main essential purpose of observational activities and field notes as a secondary supportive activity to the participating and immersing oneself in the studied culture. During the observations phase of this study, the latter position was taken, where experiencing, understanding and to some extent participating was more important than producing extensive pieces of writing.

It was also important, however, to ensure the validity of the final field trip account by making accurate records of notable events, places and situations that the researcher intended to record and/or found useful once in the field. This is where the digital photography approach, discussed above, took on the role of taking detailed notes of events and places, where this was applicable while freeing the researcher to be immersed in the activity instead of stepping back to take notes. For instance, instead of describing in writing the situation in the car park of Stones of Stenness, a photo was taken *in situ*, that showed not only the situation, but also day, time, weather conditions and other ambient features that may or may not be useful for the subsequent analysis. Photographs also allowed the researcher to record the chronological sequence of events during a given day, providing reliable evidence for the writing up activity, as well as an audit trail for the reader, should this be required (Yin 2018).

This writing up activity took place after the return from the field trips. Similar to how an observer would write up their final notes from draft notes taken in the field, in this study final field notes were written up using the information from the photographs. Mulhall (2003) also notes that while writing up notes *in situ* or closely following the observational activity allows for recording as many details as possible, there is merit in writing up after some time of reflection, albeit it will need to rely on the memory of the researcher to remember the details. Here it is argued that it is possible to overcome this challenge by relying less on a memory but on photographs taken, addressing a methodological gap, recognised by Basil (2011), where the visual aspect of observations has been underutilised in observational research. Moreover, by looking through photographs, it is possible to evoke the memories of the events, allowing the researcher not only to accurately record observed situations but also record her own reflections (Basil 2011), thoughts and feelings, deepening the understanding (or identifying gaps in it) and providing richer information for the data analysis.

5.4.2.3 *Role of the researcher*

The role of the researcher is often considered when planning observations (Saunders, Lewis and Thornhill 2018). The illustration below demonstrates the applicable typology of the researcher's role in observations.

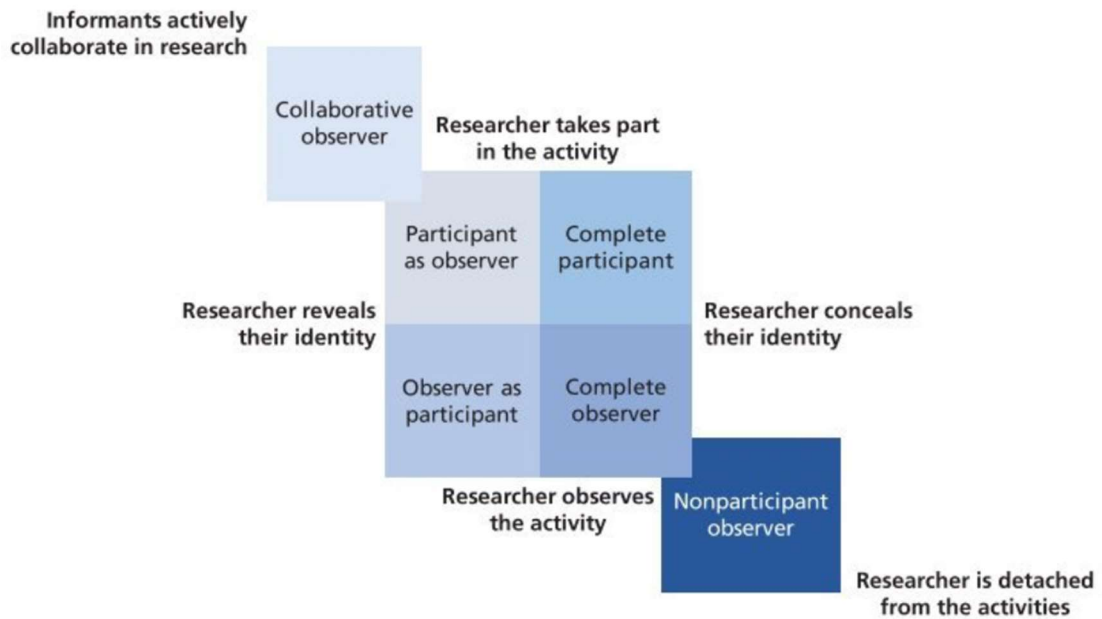


Figure 9.4 Observer roles

Source: © 2018 Mark Saunders, Philip Lewis and Adrian Thornhill

Figure 5.7: Observer roles (Saunders, Lewis and Thornhill 2018 p.388, Figure 9.4)

In this study, direct (Yin 2018), informal unstructured observations (Veal 2017; Saunders, Lewis and Thornhill 2018) were conducted, where the researcher covertly observed public spaces, such as streets, carparks, and visitor attractions. Since these were public spaces, no access negotiation was required. Moreover, individuals were not primary subjects of observations, therefore informed consent was not required (5.6.1.3). The process of observations was for the researcher to walk around and take photos of relevant places to reflect on those later.

This corresponds with the 'complete observer' typology, presented in Figure 5.7 above, where the researcher does not interact with the observed groups. While the researcher did visit the studied places and sites, arguably participating in observed activities herself (such as visiting Ring of Brodgar, or walking down the observed street), there was no intentional interaction with fellow visitors or members of the public going about their business. However, on occasion, the researcher could engage in an informal conversation with a staff member of a visitor attraction, in which case an overt introduction was made, and the purpose of the visit was explained. For example, during the first visit to the Ring of Brodgar in 2021, an informal conversation with two HES staff members took

place. The researcher asked questions about the site and tourism in Orkney, but this was not a part of the formal data collection, it was not recorded in any way and the staff members were not identified by name, photos of them were not taken and the recollection of the conversation was only described in field notes afterwards.

In addition to her role as an observer, the researcher can play a role in the information that is derived from these observations. Mulhall (2003, p.310) writes that “the practices of researchers within the field – how they present themselves, collect data, write notes, analyse – will be fashioned both by their particular disciplinary interests and by themselves as people”. Meaning, that the researcher will inevitably affect the outcomes of the observations by applying her own reflections, interpretations and prior knowledge to the information. It is important to acknowledge this, but also remind that observations are only one part of this multi-method study, and information gathered from the interviews will help to reduce the researcher’s bias and strengthen the validity and reliability of this study (Yin 2018). Having said that, this pragmatic interpretive research will always include a degree of researcher’s bias, therefore a reflexive approach is necessary.

Section 2.3 saw a call to study islands and archipelagos on their own terms, allowing the voices of those who inhabit them to dominate their research in the attempt to decolonise archipelago research (Stratford et al. 2011). However, the researcher’s understanding of islands and island life was limited prior to her first trip to Orkney in 2021. Therefore, applying reflexivity in this study is vital, to account for the influence of the researcher’s social position and prior knowledge on interpretations and explanations in this study. Drawing on Lichterman (2017 p.38), and given the interpretive stance, the author offers interpretive reflexivity, showing the readers “how we came up with our interpretations, how we made mistakes and lucky guesses along the way to capturing other people’s meanings”. Therefore, throughout this thesis, several vignettes with author’s first-person reflective account are included.

5.4.3 Challenges

Several challenges were met during this main data collection phase. The main difficulty was creating an inclusive representative database, where participants from a variety of locations, occupations and industry sectors would be included. While the resulting database presents a wide variety of stakeholders from many different locations and occupations (5.4.1), it is noted that two groups of stakeholders could be better represented:

- 1) Group 1: Participants from outer isles (outside the Mainland).
- 2) Group 2: Third-sector organisations (such as local development trusts or community groups).

In the case of Group 1, out of 29 participants who reside locally in Orkney, only 7 were from non-Mainland locations (17%). While this ratio is nearing the overall population of Orkney (25% of people reside in the outer isles – 1.2.3), it is acknowledged that more insight from varied communities in the outer isles would have been beneficial to deepen the analysis of the inter-island diversity in the archipelago.

In the case of Group 2, and linked to the point above, Development Trusts, operating on several islands of Orkney, were contacted and invited to participate in the study. However, due to the limited resources, none of the members of these organisations were able to participate, with one confirming:

“Our Directors are volunteer[s] only, so I suspect an hour for this might be a big ask as we do not deal with tourism.” (personal communication by email. 09 February 2022)

The topic of volunteering in rural and island communities is also mentioned in 6.5.

5.5 Data analysis

The data gathered from the sources named above was inductively analysed using the thematic analysis method. This process included reviewing the gathered data (interview transcripts, field notes, photography) for themes to identify patterns, analysing the recurrent themes, as well as allowing for flexibility in data interpretation (Saunders, Lewis and Thornhill 2019). Coding

and cataloguing were performed to methodically organise the gathered information and allow its classification, helping the researcher with the subsequent analysis (Veal 2017). Using this approach, the data gathered from all sources was first reviewed, a coding procedure was applied (Corbin and Strauss 2008) and emergent themes were identified (Veal 2017).

5.5.1 Data usage and presentation

Since this study was aimed at understanding the perceptions and attitudes of members of the Orkney community, the presentation of the data analysis in Chapters 6-8, as well as some elements of Chapter 9, was underpinned by quotes from the interviews throughout. To emphasise the importance of participants' contributions, and balance the power relations between the participants and the researcher (Lichterman 2017), it was important to underpin the interpretations and explanations by the voices of the respondents. The interpretations, made by the researcher based on her own observations, were clearly identified as such. Moreover, as discussed in 5.4.2.3, reflexive vignettes were offered where appropriate, as elements of interpretive reflexivity (Lichterman 2017). As noted in 5.4.1.4, the interviews were transcribed verbatim, however, for the clarity of the presentation and the message in the quotation, any auxiliary element of the speech (repetitions, stutters, non-word vocal expressions), were removed, with no additional manipulations. Reference to the speaking participant was added to each quotation, and anonymised into a code (5.4.1.2).

5.6 Ethical considerations

Ethics is "the rules, standards and principles that dictate right, good, and authentic conduct among members of a society or profession" (Fennel 2009, p.213, cited in Frechtling 2018, p.1055). In research, these ethical standards and principles apply to individuals and animals involved in any way in the research, as well as the environment that can be impacted by the research (Veal 2017). Different stages of the project will require certain ethical considerations, such as freedom of choice, informed consent, risk of harm, honesty and rigour, as well as the social benefit of the study and researcher competence (Veal 2017, p.112). Saunders, Lewis and Thornhill (2019), additionally, emphasise

negotiating access to data as a critical part of the ethical considerations of any research.

5.6.1 Data access and collection

In this case study, the purpose of the data collection was to gather the opinions of various stakeholders on sustainable tourism subject in Orkney, including their understanding of the relevant concepts, their involvement in strategy development and implementation, and feedback on these processes. Several ethical considerations were made to ensure no harm is done to the participants, subjects and the researcher as a result of this data collection.

5.6.1.1 Anonymity and confidentiality

Although the research did not aim to gather any confidential information from any of the participants, some exposure to such information was inevitable. In Orkney, the organisations and individuals associated with them are working closely together on many aspects of tourism development, and often know each other personally, therefore they might know who is participating in the project and may identify a respondent by reading the published information. As this research is aimed to study an ongoing activity in a real-life setting, involving participants who are actively working on it, the risk was considered that should any controversial or conflicting opinion be obtained, published and become identifiable, it may harm the working relationship between organisations and individuals. This may also lead to potential harm to the research, thus affecting the researcher and the PhD team.

To mitigate this risk, care was taken to ensure anonymity and confidentiality, especially where the individuals have conflicting opinions and share some information on relevant organisations or activities, which is not available publicly. This was addressed in the interview consent form (Appendix 13), and sent to all the participants before the interviews, to ensure their understanding of the data processing and risks that might be involved. The majority of the participants have consented to have their name, role and organisation published, with four participants asked to review the direct quotes before publishing, should they be used. These responses were logged into a log, maintained by the researcher, and stored in a secure file repository. However, during the data

analysis, it became apparent that the anonymity of all participants, regardless of their consent to disclose their personal information and attribute their responses and direct quotes to them, must be maintained. Therefore, all participants were assigned a code, corresponding to their interview number (5.4.1, Appendix 10), which was used as a reference to any information obtained directly from them.

5.6.1.2 Literature and documentation

Some participants have chosen to send extracts or draft documents for the researcher's reference. Additional care was taken with this information that is shared but not yet publicly available (such as draft versions of the Strategy updates or action plans), ensuring that it is not used unless explicitly allowed by the participant, or until formally published online.

The data gathered through internet-mediated access included publicly available strategies, policies, guidelines, industry reports etc. These are readily available on relevant websites for public access. All academic literature was accessed from relevant publishing sites via a university licence. Any news articles and other relevant media (social media, TV reports etc) were accessed via publishing sites. All sources of information were acknowledged appropriately in line with referencing guidelines. Consent was not required from the originators of these materials to use them for the research, since the materials are publicly available online or accessed via licence. The research was not aiming to access private organisational data (such as financial reports) or any internal documentation, therefore physical access to organisations was not required.

5.6.1.3 Photography

It is widely noted that explicit informed consent is required from people appearing in photographs, even in the case of public spaces (Yin 2018). Indeed, several photos chosen for this study included individuals on the streets, car parks or visitor attractions (5.4.2.1). In such situations, a major difficulty arose since this was impossible to obtain informed consent from every person in the photos. To overcome this difficulty, a number of considerations were made. Firstly, in line with Baxter et al. (2015) and following Harper (2005 p.759), it was agreed that it is not likely to harm individuals featured on street photography in public spaces, "showing normal people doing normal things". In

addition, as Harper (2005) notes, it is generally accepted that such places could invite public photography.

Secondly, the photos were reviewed to assess the visibility and identifiability of individuals in the frame. It was concluded that while the majority of selected photos did not include individuals at all, those that did include showed individuals simply walking on the streets of Kirkwall or participating in a group visit to visitor attractions. Some photos, in particular those from visitor attractions, were taken from a distance, which made the individuals unidentifiable. Similarly, some photos showed the individuals from the back. Only one photo of a group of young people was taken up close (the 'blackening' ritual) and in this case explicit verbal consent was obtained from the group to take the photo of them. It was decided to use these photographs given the above.

Thirdly, as previously explained, the photos were taken as a tool for the researcher (for her eyes only), and were not intended to be shown to the public, contrary to a photo-elicitation study, for example (see Baxter et al. 2015). This is with the exception of illustrations included in this thesis, the stakeholder report (which will be prepared and disseminated following the completion of the degree), or any other publication based on this study. In such cases, further risk assessment was performed to ascertain any potential harm to individuals. Where such risks were identified, measures were taken to mitigate those, such as blurring the face of the individual or car's registration plates. Nonetheless, in one instance the researcher deliberately decided not to take a photo in the first place, albeit the situation was interesting and a photo of it could have illustrated it better than a paragraph of words. However, the situation was delicate and created an argument between two groups of visitors, and photographing it would require an informed consent, which was not an appropriate request to make at that point.

5.6.2 Data storing

Ethical considerations need to be taken when storing data during the project and after it has been completed (Veal 2017). Although, as was mentioned earlier, while the research was not aimed to collect and analyse personal, private and

sensitive data, some personal data was inevitably present. Personal data is the information that allows directly or indirectly identify the individual (Saunders, Lewis and Thornhill 2019). Such data is protected by the General Data Protection Regulation EU 2016/679 (GDPR), which is implemented in the UK by Data Protection Act 2018. Principles of this Act include lawful, fair and transparent use for explicit purpose only, adequate and for no longer than necessary, and handled with appropriate security measures in place (Gov.uk 2018). The data gathered for this project was securely stored on cloud premises (OneDrive) under the university's IT protection and security. The access to this repository is password protected, allowing access only to the researcher. The personal data is anonymised when used in data analysis and reporting (5.6.1.1), and any files containing this personal information will be stored separately from the responses, to prevent identification. These measures will help to protect all the research data during the project and after its completion. In compliance with the Act, the data will be deleted if requested by the owner of the data to do so.

This is also important to acknowledge any conflict of interest that may arise from this research. The research is not funded or sponsored by any organisation, affected by or participated in the research, therefore no conflict of interest can be recognised. It is also not expected from this research to have significant commercial potential, therefore no additional protection is required.

5.7 Methodological reflections

Guided by pragmatism and interpretivism (5.1), this study has the philosophical underpinning to decide on the most appropriate methods to achieve its aim, as well as use a critical approach to deepen the interpretive and inductive analysis of the gathered data. Therefore, as the data analysis progressed, a number of critical and pragmatic decisions were made, to benefit the outcomes of the enquiry. The researcher's reflection on these decisions is presented below.

5.7.1 Non-Orkney participants

As mentioned in 5.4.1, two participants in the interviews did not reside in Orkney (MI-07). The initial aim of the MI-07 interview (CEO of VisitScotland¹⁴)

¹⁴ Both MI-07 and MI-31 consented to disclosing their name, role and organisation.

was to gain the perspective of an external stakeholder of Orkney tourism on tourism development in Orkney and other Scottish islands and to understand his perspective on the alignment between the national tourism strategy to the Orkney tourism strategy. The conversation was very helpful to put Orkney tourism development in a national context. However, as the analysis progressed, it became more important to concentrate on the opinions and perceptions of Orkney residents, who became the sole focus of this study. For similar reasons, the responses from MI-31 were not included in the data analysis, since the participant was not a member of the Orkney community. This participant, representing a global tourism consulting organisation – The Travel Foundation, provided consulting services to Destination Orkney Partnership during the Strategy update and Action Plan development post-pandemic. While not included in the analysis, this conversation had a significant impact on the researcher's understanding of the strategy development processes, power dynamics and reasons for delays in the Action Plan release (mentioned in Chapter 9).

5.7.2 COVID-19 and the 'new normal'

This research project began in October 2020, when the COVID-19 pandemic was at its peak. The initial research proposal, context for this study and the conceptual framework, were centred around the impact of the pandemic on tourism, sustainability and its implication on tourism strategies. The studied strategy was released shortly before the COVID-19 pandemic was announced, therefore detailed planning and implementation were put on hold. While it is acknowledged that time gaps between development and implementation for any reason must be avoided to ensure cohesive and continuous stakeholder participation, and generally to use the 'momentum' (Albrecht 2010), the unprecedented impact of COVID-19 on the tourism industry and all other spheres of life could not be foreseen. Although several global events were affecting the industry previously, as Gössling, Scott and Hall (2020) argue, none of them had such an impact as the current COVID-19 pandemic, due to the nature of the virus and the measures imposed by governments, restricting travel and contact. This has had a major impact on the tourism industry worldwide, immediately projected onto individual locations, and its impact on the Orkney tourism industry was also acknowledged.

Despite the significant effect of the COVID-19 pandemic on the lives and livelihood of many, by the time the data analysis commenced (January 2022) it was no longer at the forefront of the discussions, comparing to the pilot study (5.3.1). While the question about the 'new normal' (Appendices 6-8) was offered to all the participants, the answers did not indicate a significant weight of the pandemic's consequences on the discussed topics. This is with a few exceptions: (a) economic impact on businesses and recruitment challenges going forward (7.2.2); (b) lack of visitors and sense of place (8.2.2); (c) sustainability agenda, which was prominent already before the pandemic (7.2.3). Therefore, while the COVID-19 pandemic still provided one of the contextual features of this study, and referred to throughout where relevant, it was no longer emphasised in the objectives of the study. It was decided that other, more significant issues, that were at play before the pandemic and continue to affect the sustainability of tourism development after its conclusion (such as place, power and archipelagic context), deserve more explicit attention of this study.

However, it must also be acknowledged that from the researcher's perspective, the pandemic restrictions brought significant opportunities. Due to the digitalisation of communication, remote working, and normalisation of online meetings, 90% of data was collected using Zoom/MS Teams. From ease of recruitment and access negotiation (Saunders, Lewis and Thornhill 2019) and video recording opportunity, which later proved very useful during the transcription stage (5.5), to eliminating budget considerations and overall time management for this phase of the study. It allowed progress with data collection despite the restrictions, making it more convenient for the researcher, as well as the participants (5.2.3). Notwithstanding the advantages of online interviewing, it was found very useful to have three interviews in person. Firstly, it allowed the researcher to visit two important places in person – Destination Orkney Limited offices in Kirkwall, and RGU Orkney offices in Stromness. The visit to the working farm for the MI-28 interview was also very useful, as it gave a significant context to one of the largest industries in Orkney and to some of the challenges the rural communities are facing.

5.7.3 Evaluation framework

As discussed in 5.3, the conceptual framework for this study underpinned the provisional evaluation criteria, as well as guided the development of interview questionnaires. The qualitative interpretive approach of this study, however, led to conclusion that some features of the framework were no longer the most appropriate guiding principles to reach the aim of this study. Three elements for this decision can be identified (in addition to the 'new normal' context, as discussed above), as follows:

(1) Interpretation of 'why', rather than reporting on 'what':

It was deemed significantly more important to concentrate on the sense of place attributes and value perceptions, than technical sustainability indicators or direct opinions on the strategy. After all, it is the *why* question that was important, more than *what* – why the perceptions are the way they are, rather than what those perceptions are in the first place. The *what* was important during the data collection, and to underpin the inductive thematic analysis.

(2) Development, content, implementation

The literature contends that strategy implementation is often more important than the strategy itself, and more research is required on it (Dodds 2007; Albrecht 2010, 2017; Guo, Jiang and Li 2019). Indeed, as evident from the conceptual framework (5.3), Stage 2 of the process included three evaluation parts – development, content and implementation, promising to address this concern. However, during the study, it became clear that it is not possible to analyse the implementation of the strategy, since it has not yet begun and the action plan for it has not yet been released. The development stage of the strategy was noted in its analysis (Chapter 9), however, it was decided not to split the discussion into 'development' and 'content', instead providing a holistic analysis of the strategy as a reflection of the strategic planning process.

(3) 'Success' and other data

Also evident from the framework that the element of 'success' in Stage 1 was planned to underpin the subsequent evaluation framework in Stage 2. Similar to the above points, this element did not appear in the final evaluation, since other

factors at the root of the perceptions of success were found to be more important. This brings this reflection to the final point, summarising the development of this study. The wealth of data collected based on the evaluation framework enabled rich and in-depth analysis to reach the root cause of the residents' perceptions of tourism and the need of Orkney to become a sustainable destination. While not all the data was systematically reported on in the analytical discussion, it was used to inform the analytical results of this study.

5.8 Conclusion

This chapter presented philosophical and methodological considerations and processes for this study. The applicability of taking both pragmatic and interpretive ontological stances were discussed, and their underpinning of the chosen methodology was evidenced. The practicalities of data collection and analysis were also discussed, and the importance of interpretive reflexivity was highlighted. The methodological complexity of this study was demonstrated and reflected upon, to ensure transparency of the approaches taken. With this understanding of the research positionality and approach, the analytical chapters can be presented.

CHAPTER 6

Sustainability and Sense of Place

This chapter presents an interpretive analysis of the relevant attributes of Orkney communities and their relationship with their place. The importance of this analysis, and its presentation at the beginning of the analytical part of this thesis, is twofold. Firstly, this is in line with the positionality of this study that the voices of the people who are affected by tourism are represented at the centre of this study. Secondly, in line with concepts of place, discussed in Chapter 4, the interaction between people and place is what transforms a *space* into a *place* by assigning it meaning or value (Tuan 1977). It, therefore, creates a unique layer of context of Orkney as a *place*, through which the tourism strategy must be viewed, to ensure it addresses the needs, determined by this interaction. This unique layer of context is the last layer of the Layers of Context model, presented in Figure 2.1 in Chapter 2 and repeated as Figure 6.1 below, emphasising the unique layer of Orkney Islands.

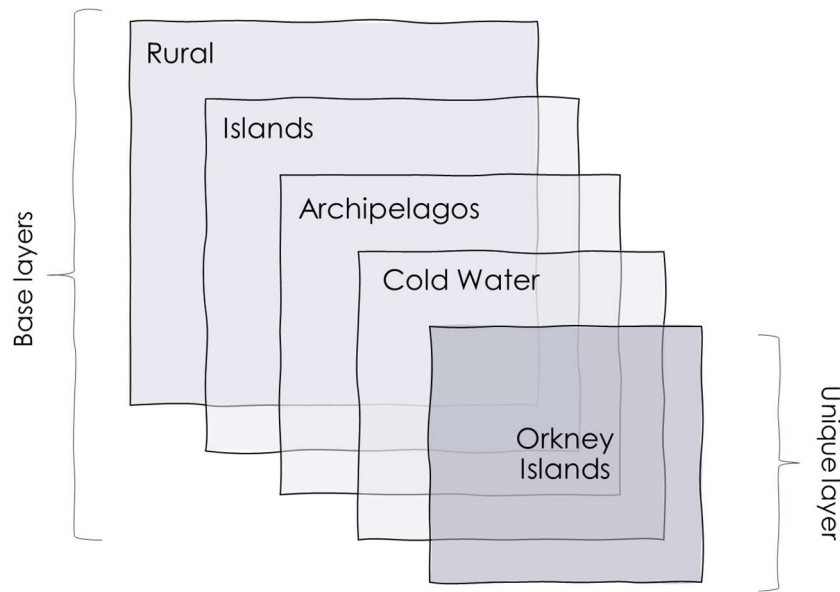


Figure 6.1: Orkney Islands layer of context emphasised (author)

To remind the reader, from the reviewed literature (Chapter 2) it was concluded that while destinations with similar geographical layers of context (rural, islands, archipelagos and cold-water islands) will have shared characteristics and face some common challenges, the last layer of context will determine how the features of the common layers are manifested in Orkney, as a result of the people-place interaction. This chapter will introduce Orkney people and their relationships with Orkney as a place, to determine the attributes of place attachment, place identity and therefore the sense of place. This will inform the subsequent analytical discussions in the following chapters.

The discussion begins with a review of residents' perceptions of sustainability in Orkney. As noted by James, Olsen and Karlsdóttir (2020), while studies on stakeholders' concerns over tourism impact have been conducted, it is yet unclear how the concept of 'sustainability' is understood by the stakeholders in the destination. This analysis, presented in 6.1 is based on the information from a specific question that all participants were asked during the interviews (Appendices 6-8):

Q1: What do you think sustainability is and what are Orkney's sustainability needs?

However, in these semi-structured interviews participants discussed various issues beyond the specific questions provided by the researcher (5.4.1). Therefore, data obtained from other answers were coded into the 'Sustainability needs' concept, where it was deemed appropriate by the researcher.

To understand the reasons for the complex views on sustainability in Orkney, and in line with the discussion in the literature review chapters, an understanding of the sense of place of Orkney residents will then be sought. Lecompte et al. (2017) derived the meaning of sense of place of the residents via in-depth interviews, where the participants were invited to talk about their lived experience in their place, guided by questions on their use of the place. However in this study, the sense of place is regarded as a stepping stone to ascertaining the context of Orkney, underpinning tourism strategy evaluation. Therefore, its understanding was derived from participants' reflections on the strategy and related topics (5.4.1.3).

6.1 Defining Orkney sustainability

While many participants referred to the so-called academic definition of sustainability (1.1), the detailed understanding what this means for Orkney is more complex. Some participants reflected on sustainability of Orkney in a more general sense, and others discussed it in tourism context specifically. Nonetheless, these discussions painted a complex, and at times, contested, picture of what Orkney's people regard as 'sustainable' for their place, in line with previous studies (James, Olsen and Karlsdóttir 2020).

Some participants regarded sustainability as a long-term outlook, relating it to the specific attributes of Orkney, such as natural and archaeological history sites:

"I'm sure there are lots of academic answers to this question, but from a practical point of view, and I would like to see the sustainability embrace the concept of making sure that your environmental capital, in other words, so all the beautiful sites we have here, both the natural history sites and archaeological sites, to make sure that the tourism impacts on those sites is genuinely sustainable and that they are not damaged in the long term by the use of tourists." (MI-09)

In this long-term outlook, more holistic definitions were offered, including the concept of reciprocity, as a prerequisite for sustainability:

“Sustainability is about I think it's about reciprocity, actually. It's about not taking so much to what you take doesn't get a chance to recover.” (MI-14)

In this conversation, the participant provided an example of cruise passengers participating in beach clean activity while onshore, therefore fostering this reciprocal relationship between visitors and the destination. In fact, such practice indeed exists in another cold-water archipelago, Svalbard (Ren et al. 2021). It can also be seen as a reference to the regenerative tourism paradigm, where reciprocity between humans and nature is at the basis of tourism activities (Mathisen, Søreng and Lyrek 2022). Moreover, reciprocity is attributed to the exchange between two actors (here, visitors and local community) in Social Exchange Theory (Ap 1992), as discussed in Chapter 4.

It was also found that ‘sustainable’ is often used as a synonym to ‘environmental’, with terms ‘net zero’, ‘biodiversity’ and ‘circular economy’ often included in the definition. Another very prominent attribute of ‘sustainable’, similar to ‘green’ (7.2.3), is renewable energy. As noted by Prince et al. (2023), wind turbines as symbols of a sustainable future, echoed by another participant:

“So sustainability obviously. Um, the first thing which comes to mind I think for most folk is probably energy and consumables in that sense, and always talking sustainable energy sources and that sort of thing either wind, solar, tidal, um, but also in where we get things made, products made, [...] all these various elements that lead to sustainability.” (MI-30)

However, Orkney’s physical environment and its visual appeal are seen as sustainability indicators as well, whereby the large infrastructure developments for the renewable energy industry can jeopardise one of the main attributes of Orkney – its landscapes (7.1.1).

“Well, I think at the moment there's a lot of change or it feels like there's a lot change about to come to Orkney. So those are mostly energy projects. So I think sustainability in those terms means really whether you want Orkney to stay the same in terms of how it looks visually, I think there'll be a big impact.” (MI-19)

Such different meanings of sustainability (renewables vs untouched landscape) illustrate the contested nature of sustainability in Orkney, constituting the contested character of rurality (Heley and Jones 2012). Moreover, in line with Chapin and Knapp (2015), and as will be discussed further, differences in sustainability needs can stem from the difference between place identity, and therefore sense of place, experienced by different people in the same place.

Conversely, as observed by Liu (2003), sustainability is often misconstrued as a predominantly environmental concept, disregarding, at least in theoretical discourse, the social and economic needs. This is as opposed to practical implementation, where the sought-after balance becomes skewed towards economic sustainability (Hunter 1997; Bramwell and Lane 2011; Hall 2011b). Keeping in mind the critique of a 'balance' approach, discussed in 1.1.1, interesting reflection can be made on the opinion of a participant, who by occupation has a degree of responsibility over the cruise sector in Orkney:

"I often use the word sustainability purely to have something that is less impactful upon the environment to be sustainable. I suspect many others say sustainable on pure numbers and volume tourism. So I think it depends how we're looking at that. I think there is a balance to be had, but it doesn't mean that it's a restriction on numbers. It's just the way we do things differently and how we then look to the future." (MI-02)

This opinion, given specifically on the concerns of a large number of cruise calls and visitors, confirms that while the need for environmental sustainability is acknowledged ("is less impactful upon the environment"), the prevalence of economic need will be stronger ("it doesn't mean that it's a restriction on numbers"). As Scheyvens, Banks and Hughes (2016) argue, seeking balance is unrealistic, given the tensions between the needs and interests of various stakeholders. In Orkney Harbours' case, a clear financial benefit is derived from the cruise sector (see discussions in 8.2.1 and 9.2), thus resistance towards potential limits for environmental reasons is exhibited, as expected in the current market economy (Higgins-Desbiolles 2011).

Among individual tourism business operators, bias towards economic sustainability (Table 1.1), meaning 'sustaining tourism', instead of using tourism

as a tool for sustainable development (Sharpley 2000; Higgins-Desbiolles 2011; Creaney and Niewiadomski 2016), was also observed.

“Yeah well, sustainability really is just you want business to be able to be ongoing for the foreseeable future, and then this is how would you do that.” (MI-13b)

“Well, sustainability in any industry must be that there's enough people there to make it function, I think, and that includes our own farming sector as well, as the age profile of the farmers just getting older and older.” (MI-24)

Nonetheless, some participants also acknowledged that a holistic outlook is important, “because it conveys the complexity of interlinking systems” (MI-28), which means sustaining the tourism industry without damaging society and the environment, and other industries as well (Butler 2018; Nowacki et al. 2018).

“And just looking after the place where we live, I think to me as a holistic approach. Yeah, we all need to live. But if [profit] was our only focus, I would say it's wrong, you know. It's I love where we live, and I know you want the place to do more than just to survive. You want it to thrive as well, you know?” (MI-13b)

The “love where you live” comment, noted above, links to the argument that to ensure sustainable places and communities, a strong sense of place must be fostered, where reconnecting with their home and heritage (Horlings 2015). Another interesting reflection was offered by the participant, quoted above, in line with the argument that “sustainability is a never-ending journey” (Agyeiwaah, McKercher and Suntikul 2017 p.26):

“Sustainable is a difficult question. I think there's an element, an element of changeable, [...] So historically, Westray was a big exporter of fresh eggs, for example, doesn't do that at all now. So things are sometimes, you know, things are just moving and changing, for whatever reason. [...] So sustainability, it's the moving thing and can you change along with changes that happened - can you change and adapt to that?” (MI-13b)

However, the discussion with some of the participants at times led to categorical opinions about the problematic definition of sustainability and sustainable tourism in general, referring to it as “idealistic” (MI-14), “oxymoron” (MI-14; MI-25) and “useless” (MI-25). As another participant remarked:

"it's almost the word that should be removed from English language, because it's become so... It's a mystery word that no one understands, it's a word which almost has no meaning anymore. It's just it's just used to pad people to make them appear to be ticking boxes, it's ticking boxes". (MI-23)

Another interviewee reflected on the un-sustainability of island living, by definition:

"...the islands are not sustainable because if you wish to live in an island, you are automatically saying that you have a right to demand goods to be delivered to you, and items to be taken further than they need to and distribution networks to be maintained and subsidised and managed for your caprice of living on an island." (MI-25)

Indeed, according to Fraser of Allander Institute (2020 p.21), "Orkney – at 8.7 tonnes (t) – has higher per capita CO2 emissions than the Scottish average of 5.3t.", confirming that the island economy is inherently susceptible to higher carbon costs. However, Ioannides and Petridou (2015) ask if penalising island residents with limited economic opportunities and devastating climate change consequences, simply for being *from* the islands, is fair. The comment above is, therefore, noteworthy, since it refers to *choosing* to live on an island (off an island) despite acknowledged environmental impacts, potentially looking at it from an incomer point of view, underestimating the fact that for some residents these islands are *home* after all.

Nonetheless, the sustainability impacts of the dispersed archipelagic population were acknowledged in literature as well. According to Spilanis, Kizos and Petsioti (2012), delivering goods is not the only challenge, causing strain on the public and private resources and services. Discussing Notio Aigaiio Region of Greece, which includes 40 inhabited islands, the authors explain:

"If all its population was living on one island, a maximum of three ports would be sufficient, while now there are 50, along with 14 airports instead of one, 21 power production plants instead of one, five hospitals instead of one, 90 primary schools instead of 211, 35 waste water treatment units instead of eight, and so on." (Spilanis, Kizos and Petsioti 2012 p.211)

In tourism context specifically, the above quoted participant continued:

“But to then encourage more people to come here to see our island, it's a completely perverse idea in the context of changing our planet and saving our planet and doing things. So tourism, as we understand it, is fundamentally unsustainable.” (MI-25)

Connectivity and transportation, therefore, becomes the major sustainability challenge, not only from an economic and social perspective, as discussed by Currie and Falconer (2014), Baldacchino and Ferreira (2013) and others (see Baldacchino 2015a), but from an environmental perspective as well.

As observed in literature, critiquing the sustainability concept, sustainability needs and indicators vary across disciplines, layers of society and contexts (1.1.2). In addition, Saarinen (2006) argues that local communities might not have the knowledge and understanding of tourism sustainability impacts. Yet, the interviewee explained that the Orkney community in general has a very good understanding of what ‘sustainable’ looks like for Orkney, while also acknowledging that the sustainability attributes are varied between different groups in the community:

“There's just so many elements of the sustainability picture here and I think different pockets of the community are definitely involved in different areas. They're all intertwined. The renewables energy message, it might not be a message for everyone about what Orkney does and how it features. It may be Orkney approach to sort of slow food and drink and that type of sustainability and more on agricultural side as well. But I think it's quite diverse and I think broadly people have a really good understanding of sustainability here and what it takes to live and survive and interact in an island environment.” (MI-29)

However, while varied, these attributes are also closely linked, and it is the interconnectedness of them that supports the overall sustainability of island life. To understand these attributes and the reasons behind them, it is vital to understand how people relate to their place, as a key element of sustainable development (Masterson et al. 2017).

6.2 People of Orkney and their sense of place

In the earlier discussion about islands and archipelagos (Chapter 2), it was argued that understanding layers of context will require insight into how people,

who live there, view, represent and experience the complexity of interrelations between their islands and the relationship of those with their *mainlands* and beyond (Stratford et al. 2011). The concept of “multiple peripherality” was noted (Spilanis, Kizos and Petsioti 2012, p. 202), affecting the sustainability of the archipelago and its communities. Attributes of islandness were also discussed, including dependency on nature, weather and fellow community members (Conklin 2007), to overcome vulnerabilities and maintain resilience towards numerous challenges many island communities are facing (Campbell 2009; Hall 2012).

In Chapter 4 the relationship between place and people was explored. Stronger place attachment among rural communities (Belanche, Casaló and Rubio 2021), island community identity and its effect on attitudes towards tourism (Nunkoo, Gursoy and Juwaheer 2010) were noted. However, such relationships, albeit theoretically acknowledged, will manifest in a variety of ways, unique to each archipelago and its context (Stratford et al. 2011). In Orkney Islands, these relationships are complex, and the notion of community is represented strongly in Orkney and woven into the conversations with the participants and observed by the researcher during her fieldtrips. The term ‘community’, therefore, was found to best represent the relationship between the Orkney archipelago and people who live there.

However, the semi-structured interview schedule did not originally include specific questions about ‘community’, apart from a discussion prompt “Does it [the strategy] fit local community values?” (Appendix 6, Q3) and “How local community consultation was conducted?” (Appendix 7, Q6). The term ‘community’ was unpacked further only depending on time and the overall direction of the conversation, providing an interesting and deep insight into Orkney. Therefore, while all the participants reflected in one way or another on the community role in strategy development, with many participants delved deeper into a wider discussion on community. Moreover, the researcher observed special enthusiasm and willingness to talk about this subject, alluding to the high-value participants place on the sense of community in Orkney, willingness to belong to and identify as a part of it, and share such feelings with an outsider (here, the researcher). Overall, 17 participants provided information

on the character of the Orkney community, and 15 participants provided their definition of community, whereas the remaining participants used the term in their answers while not explicitly providing definitions or attributes. Alongside the specific questions, themes relevant to this topic were identified from the conversations overall, and coded accordingly (5.5). The results of this analysis and its interpretation are presented here.

Prior to delving into the definitions and attributes of the Orkney community, however, the author would like to offer a piece of reflection on these conversations and the subsequent writing up process of this section.

As a non-island resident, I did not have first-hand experience of island life and island communities. In these conversations, I found that this gave me both an advantage and a disadvantage. On the one hand, I was able to ask questions, that might have sounded obvious to those who have more knowledge and understanding of the attributes of island life and its communities, allowing for more rich and in-depth data. On the other hand, it created a very complex picture, which was difficult to convey in words and statistical information. This complexity, and my personal detachment from the practicalities of island life, beyond academic involvement and observation visits, created an anxiety about doing injustice to the people of Orkney and their feelings and opinions of THEIR place. Therefore, this section is intended to illustrate the most prominent attributes of the Orkney community, rather than to produce a statistically accurate result (Grydehøj (2008) presents a similar reflection). This is while also acknowledging that (a) this was learned from 31 conversations, and others might have different opinions; (b) the reality is significantly more complex than a collection of attributes; and (c) the representation of the Orkney community, while based mostly on the account of local residents, has inevitably a degree of my own interpretation.

Vignette 6.1: Outsider

6.3 Origin and identity

To begin the exploration of Orkney's sense of place, the place identity, in its person-centred form (4.1.2), is discussed. As introduced in 1.2.3, Orkney population is diverse, constituting people from different backgrounds and sociodemographic attributes. The diversity of groups within Orkney society is

reinforced by a plurality of identities, often based on their origin, but also their relationship with Orkney as a place, its history and heritage (Lange 2006). It is argued that origin is seen as a driver for place attachment and place identity (Hernández 2007), which in turn steers perceptions and attitudes towards tourism development (Wang and Chen 2015), affecting the sustainability of these development efforts (Rasoolimanesh et al. 2015).

In addition to those rooted in Orkney for generations, there is a significant number of residents who moved in from other areas of Scotland and the UK¹⁵, mainly England. From the available data, dating back to the Scottish census in 2011 (National Records of Scotland 2015), it can be learnt that 22% of Orkney's population was of non-Scots origin, whereas 80% of those (or 18% of the total population) were born in England. This attribute of Orkney society is not unique to Orkney and is only slightly above the overall % of non-Scots and English residents in all Scottish isles – 21% and 16% respectively. However, the % seems to depart from the national statistics when it comes to Orkney's outer isles. From the same statistical source, it is learned that all Orkney non-Mainland islands positioned well above the total % of non-Scots and English residents, with islands Eday, Rousay and Stronsay heading the chart with figures over 50% for non-Scots and above 40% for English residents. Figure 6.2 illustrates these numbers.

¹⁵ According to National Records of Scotland (2022), the total population of Orkney increased by 17.3% between 2001 and 2021, which is the 2nd highest increase among all 32 local authorities in Scotland during that time.

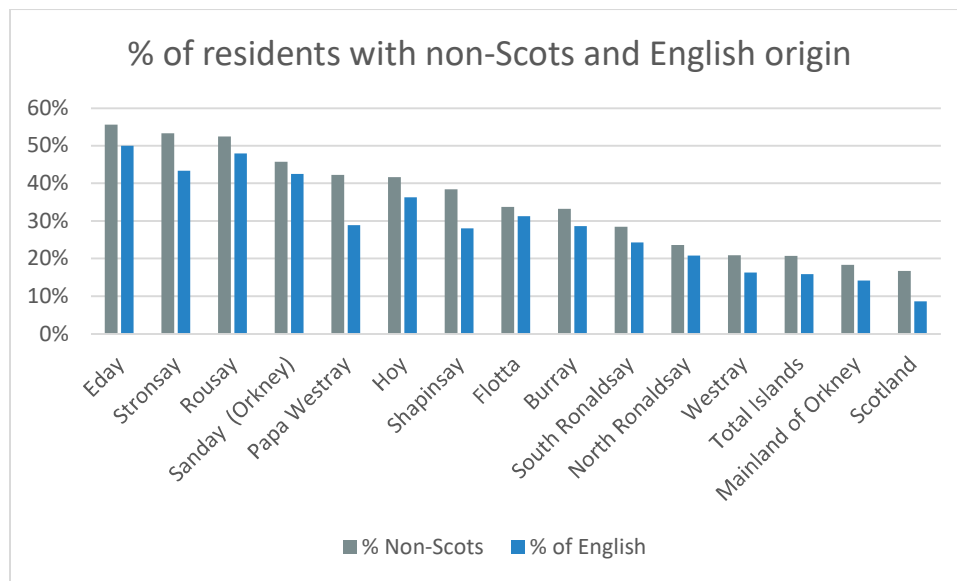


Figure 6.2: % of residents with non-Scots and English origin (compiled by author from 2011 census data, National Records of Scotland 2015)

Moreover, the statistical information, provided above, does not indicate how many people were born in Orkney, and therefore can be regarded as *native Orcadians* (some opine that this origin – and therefore Orcadian identity - can only be claimed if the person’s family lived in Orkney for several generations, as noted in 6.3.1). This also means that potentially the number of *incomers* could be higher than the census data is able to show, considering migration from other areas of Scotland. Such composition of the society contributes to many other attributes of the Orkney community and the opinions of what Orkney is and what it should be.

As Lange (2006 p.152) observes, Orkney, its heritage and its identity are much-studied subjects, therefore it is not attempted to contribute significantly to the already “impressive” discourse. It is, however, intended to understand the relationship between Orkney people and Orkney as a place, where, as will be evident from this discussion, identity plays a significant role. Therefore, three major identity groups were distinguished in this study, recognising that the composition of Orkney society is more complex and intertwined than this

distinction. For the purpose of this thesis, however, these groups are based on origin, and include 'native Orcadians', 'incomers' and 'returning Orcadians'¹⁶.

6.3.1 Native Orcadians

Native Orcadian identity can be seen as a person-centred place identity, whereby a person's identity is formed because of their relationship with the place (Hernández et al. 2007; Proshansky 1978; Lewicka 2008). In this case, Orkney residents identify as natives to the place they originate from, not only by birth, in the dictionary definition of the word 'native' (Cambridge Dictionary 2023b), but more aligned with the definition of 'indigenous' (Cambridge Dictionary 2023a), emphasising not having moved to Orkney from elsewhere for several generations. As reflected by a participant from England, who recently moved to Orkney after living briefly in the Scottish Highlands:

"...there's still a massive, truly Orcadian community and one that is very proud of its Orkney heritage. I've seen regular debates on Facebook, which always make me smile, about what makes a true Orcadian. How many generations back do both sets of grandparents need to be, to truly be Orcadian? And it's not just about being born here. It's about two or three generations back on both sides being Orcadians, both being there to be truly Orcadian." (MI-30)

The participant also reflected on what such pride might signify:

"So I think it's a very proud but also delicate community, that's very worried about being diluted and losing itself because it's not very big and the world is getting smaller. And I think they're worried about losing themselves in it. But in the same breath, are one that are very open and want to show off where they live because they love it." (MI-30)

The word "diluted" in this quote has been used previously in discussions on Orkney's indigenous identity. Lange (2006 p.151) explains that this concern stems from the exposure of Orcadians to the outside world, where tourism, as well as incoming residents, are seen as an "encroachment of modernity", in a

¹⁶ From here onwards these terms are used, in line with what these groups of residents most often call themselves and each other. The term 'returning Orcadian' is proposed by the author to distinguish native Orcadians that lived away from Orkney before returning.

society where the past is often more valuable than the present. This, in turn, results from the defensiveness of that same past, manifested in elements of heritage, such as traditions, accent and ancestry (Lange 2006). As a native participant, who lived away from Orkney for a long time before returning, remarked:

“I think Orcadians are very proud. I think they can also be quite defensive about the community as well. Um, so there's a, this maybe sounds a bit... conversely, there is a slight defensiveness, but also this openness and wanting to know you and welcome you...” (MI-29)

As argued by Lewicka (2008), those with a stronger attachment to a specific place usually display a stronger interest in heritage and past, and their own roots in this place. Another native participant confirmed this, linking the pride in Orkney heritage to the native Orcadian identity:

“But one thing we do have in Orkney is we have a strong community where we still have a lot of Orcadians, a lot of local people... we're proud of our local heritage and our way of speaking.” (MI-22)

This pride is partially driven by Orkney's Nordic heritage (equal to 'Viking', according to Lange (2006)), which is widely recognised and celebrated in Orkney society. However, the recognition is rooted much deeper in the native Orcadian community, who argue for their close relations with Norway on a genetic level.

“There's a genuine, genuine relationship between Orkney and, well Bergen really, Orkney and Norway. And it's based on common heritage and on genetics. And so, anybody from Scandinavia will automatically be very welcome here.” (MI-22)

This confirms the interesting and critical discussion by Lange (2006 p.151), on how Orkney identity is shaped by its *heritage* (in Lange's argument, as opposed to *history*), where “focusing so heavily on a past separated from historical process implies a denial of the present”. This is interesting in the context of this thesis, since such a notion can directly affect perceptions of the benefits and impact from tourism development, as will be discussed in the following chapters.

Indeed, the events from the bygone age of the establishment of Scottish rule in the archipelago still affect the relationship with Scotland (McClanahan 2004), and the attitudes of some Orcadians towards Scots:

“Orcadians have been told by their history and their heritage that life was good in Orkney until the Scots showed up, and this can translate into prejudice against Scottish people today” (Lange 2006 p.152)

Even in 2023, at the time of writing, Orkney Islands Council set to vote on a motion to gain political autonomy from Scotland, and their willingness to become an autonomous territory of Norway instead (6.5.1.1). Nordic heritage is commonly reflected in Orkney’s place names, dialect, and traditional events, such as Ba’ game on Christmas day (Towrie 2023b) and the flag (Figure 6.3), called St Magnus Cross, which features the Nordic cross (Flag Institute 2023).



Figure 6.3: Flag of Orkney (Flag Institute 2023)

Orkneyinga Saga – an Icelandic saga that tells a narrative of the Earls of Orkney between 10th-13th centuries, still influences Orkney identity to this day, evident in the popularity of the names from the Saga for Orcadian boys (Downes and Gibson 2019), and establishment of Orkneyinga Trail and Orkneyinga Saga Centre as visitor attractions (Orkney.com 2024b). Nordic and Viking motifs are often embedded into the branding of Orkney products, to distinguish them from others, especially Scottish products, as was the case of Orkney tweed (Pedersen and Peach 2018) and Orkney 2025 Island Games (Figure 6.4).



Figure 6.4: Orkney 2025 Island Games logo (Orkney Island Games 2023)

Despite that Lange (2006) discusses Neolithic heritage as another point of departure for the past-driven identity of Orkney, in addition to Viking, in the present study this was not as prominent among native Orcadian participants. Moreover, richer attributes of heritage and island identity were observed on the islands, outside the Mainland. These topics will be discussed in the following sections. From the above discussion, however, it is evident that native Orcadian identity is firmly based on social attributes (accent, ancestry, names, traditions), ingrained in Orkney's heritage, as was observed in earlier studies in other places (Stedman 2006; Soini, Vaarala and Pouta 2012).

6.3.2 Incomers

Despite the long residence of many of those who moved to Orkney from elsewhere, and their active participation in Orkney life, they are considered as 'incomers', creating an interesting relationship within Orkney society. This includes a special term applied to the incoming residents - "ferry loupers¹⁷", albeit used less at present:

"You know, it's, you know, you don't hear 'ferry-louper' now, but it was quite common when I first started coming here." (MI-25)

During several interviews with the incomers, the reason for their move to Orkney was mentioned. While some (or their families) came to work in the oil and gas sector, when the industry was booming in the North East of Scotland since 1970' (Butler 1997), many decided to move following visits as tourists before making the decision.

"And I'd probably never have moved to Orkney, because I came initially as a tourist." (MI-14)

In this context, several remarks were made by the participants regarding the ability of Orkney to "capture people's hearts" (MI-09), or as another participant put it:

"There's something about Orkney that gets under your skin and that's it."
(MI-27)

¹⁷ In Scots and its dialects 'loup' means 'jump'.

This alludes to the apparent romanticisation of Orkney, where its perceived qualities are associated with the rural idyll (Panzer-Krause 2020; Shucksmith 2018), and what Lange (2006 p.139) discusses as “bleeding history”, as will be unpacked below. Moreover, the element of ‘crossing’ evidently has a role to play, since it can act as a push (escape the mundane) and pull (to the different, calm, remote) factor (2.3.2). While these authors discuss ‘crossing’ as a driver for visiting the islands, in Orkney a visit often triggers the decision to move to Orkney more permanently, as noted above.

One of these attributes of crossing is a dependency on natural forces, where weather becomes a decisive factor for many day-to-day activities, to a much greater extent than on a mainland. Several conversations with the participants (native and incomers) mentioned differences in attitudes between residents and visitors towards a slower pace of life, dependency on weather and general *smallness* of Orkney and its communities. The participants mentioned the laid-back attitude of Orkney residents towards weather disruptions (MI-22) and others told a story of visitors who became “so chilled out in comparison when they came”¹⁸ (MI-13b). While this account by MI-13 is about visitors, it alludes to what may be associated with the element of crossing (in Westray’s case, multiple crossing), and eventually may drive some of those visitors to come back and settle. The giving into the elements as an attribute of the sense of place in coastal communities was also noted by Lecompte et al. (2017). This was also experienced by the researcher, as presented in Vignette 6.2.

I was scheduled to fly to North Ronaldsay – the northernmost island of Orkney, for a one-day trip. Upon arriving at the airport, I was told that the flight was being delayed due to foggy conditions, and we would be notified once the pilot decided when it was safe to fly. The wait turned into a curious ethnographic experience, as I later wrote in my 2022 field notes:

“It was fascinating watching the people. For Sunday’s flight there were a few people, who all knew each other, but didn’t seem to be relatives, just neighbours or members of the same community perhaps. There was a young woman with a baby, and while waiting for the flight, she just took out her

¹⁸ Extract from interview transcript including the account in full can be found in Appendix 15.

laptop and said "Right, shall I work a bit?", she sat and did some laptop work, while others in the group played with her baby. They all seemed so chilled, no rush, no frustration about the delay. They just sat there, some on the floor, with their things and laptops, having a quiet chat or just working. They weren't bothered at all by the long delay and uncertainty whether the flight will go ahead or not.

[...] How island life is different from what I, as a mainland dweller, am used to. Everything is much slower, calmer. People are aware that they are dependent on the weather and nature, and there is nothing they can do about the fog, or wind or cold. And I, as a tourist, inevitably will start behaving in the same way. The group of tourists that were supposed to travel with me were, of course, a bit disappointed, but one lady said something like "ah well, what can you do" and that they did have a plan B in case they couldn't fly. I guess this is why people do move to live in such remote places, for this sense of giving in to the forces outside of your control, stop fighting for what you think you should have and just take things as they are. I haven't seen even a tiny sign of stress anywhere in that airport, despite multiple cancellations. And what was really surprising for me personally, I was calm too. I don't remember being upset or stressed at any point during this experience and I just took it as an opportunity to learn and then change plans and find something else to do. Ah well."

Vignette 6.2: Airport

This dependency on natural processes, the weather and seasons are seen as attributes of islandness, according to Conkling (2007). It is therefore evident, also confirming Conkling's (2007) argument, that the incomers, at least those met at the airport (Vignette 6.2), have adopted these attributes in shaping their *islandness*, manifested in the laid-back attitude to things outwith their control. Moreover, weather, as noted by another incomer participant, is also seen as an attribute of Orkney's place identity, in its place-centred meaning (Peng, Strijker and Wu 2020):

"If ever I'm asked about the weather in Orkney, I say the weather here is perfect. It's not always good. But if it was consistently good, the beaches would be surrounded by big hotels and the sand would be full of broken glass. And there'd be stag parties coming here from all over and there'd be

McDonald's and Burger King and everything else. So, the weather's perfect. Not always good, but it keeps Orkney as Orkney." (MI-08)

This opinion is a useful example of another common attribute of Orkney's sense of place – its uniqueness, experienced by both incomers and native Orcadians.

Archaeology and natural heritage are also featured in several conversations, mostly in connection with tourism development and its impacts on sensitive historical and natural environment (Chapters 7 and 8). Additional observations were made by the researcher, in informal conversations with two archaeologists during her visits to archaeological sites Ness of Brodgar and Swandro on Rousay. Both were incomers and spoke with notable passion about their work, and how important it is to preserve this history. As noted in the fieldnotes:

"While the students took off the stones one by one from the top of the structures to fill in the wheelbarrow, the archaeologist told me about the dig very passionately." (Fieldnotes, June 2022)

Interestingly, however, from these conversations, it was not evident that the archaeological sites, including the infamous Heart of Neolithic Orkney, were regarded as symbols of Orcadian heritage. Of course, these monuments and their historical significance were widely acknowledged, and the need to preserve them was widely expressed. However, their contribution to sense of place was more prominent as *landscape* heritage, rather than *people* heritage. As argued by Braaksma, Jacobs and van der Zande (2015), historical monuments, featured in the landscape, contribute to the overall aesthetical appeal of that landscape, and construct meaning of the place, hence contributing to the sense of place (Tuan 1977). Here, their contribution to Orkney place identity was more strongly felt as "bleeding history" (Lange 2006), where their presence *per se* in such great quantity is more significant than their historical relation to modern Orcadians. Yet more importantly, these findings to a certain extent confirm the observation by Lange (2006 p.150), who argued that many Orcadians (without specifying their origin) adopt the "for-others" (tourists) identity of Orkney, based on commodified heritage, embodied by these monuments. In this thesis, however, it is argued that the "for-others" identity includes more than the world-famous historical monuments, but other elements that construct the sense of place of Orkney residents (Figure 6.9).

Adoption of this “for-others” identity among the incomers can also be seen in attachment to physical landscapes with uninterrupted views, quiet environment and freedom, as noted also by Lecompte et al. (2017) elsewhere.

“Orkney, apart from all the archaeology and wonderful natural heritage in the rest of it, Orkney at its simplest is Big Sky Country. You know, there are so many places where you can see such a long way far further than you can see in most of, you know, when you go to Scotland, you can't.” (MI-23)

Thus, it can be argued that incomers’ place attachment and the sense of place is largely based on Orkney’s physical attributes, which contribute to their perception of free, wholesome and authentic life, different from their place of origin (Shucksmith 2018). As noted by several authors, these attributes align with the attributes of a ‘rural idyll’, often perceived by urban dwellers, attracted to relocate to these areas in search of the romanticised rural (Peng et al. 2018; Shucksmith 2018; Panzer-Krause 2020). That is not to say, however, that all incomers do not see the *un*-romanticised picture of Orkney with an array of social challenges, in line with Csurgó et al. (2023). Most of the participants from the incomers group were acutely aware of the challenges, such as poverty, housing and outmigration from the outer isles. As an incoming resident described his experience to the researcher in a personal conversation during the second field trip:

“He said that although there are some problems, hearing the quiet and the birds is better than sirens of a big city.” (Fieldnotes, June 2022)

The attachment to the physical attributes of Orkney, however, was also echoed by other participants, who are not incomers (also observed by Csurgó et al. 2023), particularly those who left Orkney and came back to settle in the archipelago.

6.3.3 Returning residents

During the data analysis, it became evident that another group within the Orkney community can be distinguished by its attachment and passion to Orkney, which deserves a separate mention. There is no statistical information regarding how many native Orcadians left Orkney and came back following years of absence. However, it was found that those who provided information that

allowed the researcher to place them in this group (no such specific question was asked, see 5.4.1.2) have interesting relationships with Orkney as a physical place and Orkney as a social construct. On the one hand, they exhibited strong connection to Orkney heritage and pride in belonging to the Orkney native community, which seemed to be the cornerstone of identity for these participants.

“But now I'm like an ambassador. It sucked me right back in and I'm really proud of Orkney and the island. I love living here, I don't want to be anywhere else.” (MI-29)

On the other hand, they exhibited strong place attachment, rooted in Orkney's environment and physical landscape, in addition to Orkney's social and cultural landscape. One of the participants (quoted earlier speaking about the native community), talking about his grandchildren coming to visit him in Orkney, said:

“Well, they've [the grandchildren] got a lot of freedom, you see. I think that's probably Orkney's biggest asset. You know, if you come from a city or some busy place, Orkney's got this sense of freedom, when you can just go anywhere you like. You know, you can go to our beach and there's nobody else on it. When there's two other people you would say it was busy. That's because, that's because the islands have so many beautiful places to go to the beach. The puffins and seals and sea mammals and. And in the summer, it's light so much you can just go out at any time of day and it's beautiful. So I think people definitely got a sense of freedom here.” (MI-22)

Such a sense of place, with strong place attachment and place identity, rooted in both physical and social attributes of Orkney, is based on all three elements of the conceptual model, proposed by Raymond, Brown and Weber (2010). These comprise personal (place identity and dependence), community (social bonding) and natural environment (nature bonding) contexts (Raymond, Brown and Weber 2010). Although perhaps such a holistic sense of place is simply determined by the fact that these residents have left and returned, and their place attachment has resurfaced stronger and fuller. As Tuan (1979 p.411) explains, “it is possible to be fully aware of our attachment to place only when we have left it and can see it as a whole from the distance”.

It is worth noting, however, that there will be those who are not native Orcadians but have lived in Orkney since childhood, left and then came back. While there was only one participant who explicitly identified with such a situation (MI-27), the acknowledgement of this is important, as well as understanding that there might be other situations, perhaps even contradictory, that will exist within the Orkney community.

6.3.4 Relationship between natives and incomers

Despite the debates regarding *nativeness*, person-centred place identity (Hernández et al. 2007; Lewicka 2008), in one way or another connected to Orkney, is found among incomers as well. As explained by a participant, an incomer, who plays an active part in Orkney society:

“But there is, there are two Orkney identities. It does say Orkney identity of everyone who does live here. And I think most people do find the sense of identity after being here for a few years. But you would never, here you would never dare to call yourself an Orcadian and that's just the people who were born here. Whereas in Shetland, if you've been there long enough, you will get identified as a Shetlander.” (MI-25)

Interestingly, however, throughout the interviews, no negativity was observed on the part of incomers towards this peculiarity of relationships within Orkney society. What was mostly observed is understanding and indulgence of such notions, which seemingly did not diminish from the sense of place and willingness to take an active part in Orkney's life.

“Orcadians are generally very welcoming people. There's... you don't feel that you're being just considered as an outsider and not involved. I think that's one of the great things about Orkney is that the incomers are generally welcomed. There are issues, things like that. But I think that's certainly one of Orkney strong points.” (MI-08)

As per the above quote, however, despite the mostly positive rhetoric regarding identity and belonging throughout the interviews, there were a number of notable exceptions, that revealed some challenges, relevant to this thesis. Firstly, despite the general cohesiveness, it was noted that the division between two main groups (natives and incomers) has become more prominent, especially

on Facebook. Interestingly, the participant who brought the issue up is a native Orcadian:

“...there is a feeling of “them and us” creeping in, which is a really bad thing... And there are people like me that have been here for generations and there's people at my wife who, you know, came from [redacted to ensure anonymity]. So, you know, it's... If you want a community to survive, it's got to have members, it's got to have people living here. And so if you want the islands to survive, it needs population.” (MI-11)

This supports Tuan (1979) argument, that identity is reinforced in the presence of threat, testing the boundaries of the *being*. Secondly, an interview with another native Orcadian brought to light a more significant manifestation of this issue. The participant spoke extensively about romanticising the islands, which is exhibited by a “disconnect” and “unrealistic understanding” of what island life is and what an island community is, by some incomers (MI-10). As put by the participant:

“I really find that a huge problem when we're talking about developing areas and trying to attract people to live there, when they have a completely unrealistic romanticised view and not really grasping the realities or what community means.” (MI-10)

The participant emphasised their concerns regarding romanticising the islands and how such an idealised picture brings about the above challenges of disconnect from a community that exists in the place and realities of island life. As per Smale (2006 p.377), romanticising places “perpetuates inequalities for marginalized groups”, supporting the concerns of the participant. Emphasising the lack of “deep community roots” and the absence of a “very wide network of different kinds of people” by some new residents, this opinion reflects the importance of social attributes to the native population, that are seemingly less prominent among the incomers, who lean on the more *romanticised* identity of Orkney.

As was also mentioned by the participant, and later observed in Fogle (2023), native Orcadians see themselves living *in* the islands and see incomers living *on* the islands. In line with Ronström (2011), such distinction refers to being an integral part of the landscape and being within the community for the native

Orcadians, which is difficult for incomers to understand (Fogle 2023). This can also be supported by the argument made by Relph (1976, cited in Smale 2006), that stronger feelings of identity with the place are evoked when a person feels more *inside* the place.

On the other hand, another participant, an incomer, remarked on a disconnect of the native Orcadians, specifically the Orkney Islands Council (in the participant's view representing the native population) from what is in the best interest of Orkney. The participant highlighted freedom as Orkney's main asset, which is being taken for granted by, in his example, the Council:

"They [the council] were always pursuing jobs and money... They think that is more important than anything else. Whereas you talk to any one of the people that just move to in the last 10, 20, 30 years, most of them have come here because of these freedoms, the things which Orcadians fail to recognise and take for granted, the things which bring people here, the fact that you know, you don't lock the doors. The fact that if your children go out, you don't have to see your children six hours a day, you don't worry about that at all." (MI-23)

This opinion seemingly accuses the OIC (and, by reference, the native population) of pursuing developments that do not go hand in hand with the essence of Orkney, as perceived by the incomers, thus, in the participant's opinion, misunderstanding what Orkney is. This confirms the argument by Soini, Vaarala and Pouta (2012), that those socially connected and rooted in the place (here the natives), see the place as a *dwelling*, whereas those with less social embeddedness in the place (here incomers) value it as static and non-changing, with a clear opinion on how it should be. While the authors spoke specifically about landscape, this can be applied to Orkney as a place, since "landscape is concerned with and manifests in the various forms of the complex interrelationships between people and place" (Gkoltsiou and Terkenli 2012 p.147). On the other hand, this can be seen as an illustration of that same romanticising notion, where some incomers have an idealised picture of Orkney ("you don't lock the doors") (Csurgó et al. 2023; Stedman 2006), whereas the reality is that the islands need "jobs and money" to be sustainable.

Findings from this section support previous studies, illustrating that shorter-term residents (new residents, second-home owners, tourists) assign more meaning to the physical landscape and natural setting, whereas native or long-term residents value social aspects more (Stedman 2006; Soini, Vaarala and Pouta 2012). Chapin and Knapp (2015) observe that for long-term residents, the place evokes feelings of place dependency and place identity, whereas newcomers attach more to a place's aesthetical and symbolic characteristics. Interestingly, however, Hernández et al. (2007) argue that such differences in place perceptions are not driven by length of residence, but by *nativeness* to the place. The authors found that the physical characteristics of a place may strengthen the place attachment of immigrants more than that of natives (Hernández et al. 2007), with natural landscapes becoming a key element in developing migrants' sense of place (Faulkner 2023).

This also alludes to the relationship between relocation and sense of place, as was noted by Bernardo and Palma (2005). This study may be an indication that passion for Orkney as a *place*, is more prominent among those who made an active decision to move (or move back) to Orkney, in comparison to those who reside in Orkney as given, either by birth or by circumstances outwith their immediate control, and who more likely to base this passion on *people* of Orkney, rather than *place*. This contributes to understanding *why* residents perceive development (or change) to their place the way they do, as was encouraged by Deery, Jago and Fredline (2012) and Sharpley (2014). The theme of residents' perceptions will be unpacked further in the following chapters.

6.4 Islands

In addition to Orkney's population dispersal across its islands, demonstrated in Table 1.3, information regarding the island population was obtained during the interviews. While there is yet no available statistical data to confirm this (it will be confirmed once 2022 census data is released), one of the participants remarked:

"...whilst Orkney as an entity is increasing in the population, the islands, I think virtually all of the islands, would have reduced over the same period that the Mainland or the general population of whole of Orkney has increased." (MI-18)

There are several reasons for such population distribution, including a decline of a once dominant agriculture sector, reduced access to services and schools, and deterioration of the public transport network (Lange 2006). Such a centralised population is not unique to Orkney, albeit more acute than in some other archipelagos. In Orkney's neighbour Shetland, for example, 82% of the population reside in Mainland Shetland (Population Data UK 2023), and the urban archipelago of Malta, where 92% of its residents live on the main island, also called Malta (Baldacchino and Ferreira 2013). In the Azores, on the other hand, around 55% of the population is concentrated in São Miguel, where the administrative centre is based, as well as the main air gateway to the archipelago (Baldacchino and Ferreira 2013). In the Faroe Islands, 40% of the population resides in the capital town of Tórshavn, with the rest of the population dispersed around its 17 inhabited islands (Føroya Landsstýri 2023; Hagstova Føroya 2023), most of which are connected by fixed links¹⁹ as a means for decentralisation (Ankre and Nilsson 2015). The disproportionate population dispersal is one of the key features of archipelagos, that has consequences for social, economic and environmental sustainability, as well as tourism development (2.2.2, 2.3.3). Nonetheless, despite demographic challenges, people who live in these small peripheral islands of Orkney, form strong and distinct communities.

"I think that's [community] a really beautiful thing for in Orkney, and that's why I love being here, and that's what one of the things I love about living in small islands. And I think it makes a very kind and worthwhile way of living."
(MI-10)

According to the participants, there is a distinct community on each island, and sometimes even each part of the island (largely when speaking about the Mainland and the distinction between Kirkwall and its other areas). Indeed, as written by Fowles (1978 p.56), quoted in Conkling (2007): "There is the marked individuality of islands which, we should like to think, corresponds with our own; their obstinate separateness of character, even when they lie in archipelagoes [sic]". In Orkney, the distinctiveness of island communities was largely

¹⁹ Fixed links – bridges, tunnels and causeways between islands

attributed to the fact that they are geographically isolated from other communities, regardless of the connectivity between their islands. This isolation results in people coming together to overcome collective challenges and hence reinforces the community bond.

“...community is just the sort of group of people you're surrounded with. And I mean, we all have our own parishes and the communities, and certainly in the isles, they tend to be the strongest because they're sort of I mean, they're isolated and they have, I mean, it's great that they've got sort of community funds and things and they club together and do things as a community and everyone to sort of supports each other.” (MI-21)

Moreover, such a sense of community is reinforced by heritage, collective history and folklore. As was explained by a participant, referring to the “teu-neems”, or nicknames, associated with each district (Towrie 2023a):

“Each island is also associated with a creature and so forth.” (MI-25)

This island community identity is maintained and reinforced through initiatives, such as heritage centres, visited by the researcher in Westray, Sanday and Rousay. In the fieldnotes from her trip to Westray, the researcher reflected:

“I went to Westray Development Trust museum, which was open, and had a very long visit, looking at all the well preserved history of farming, fishing and the community of Westray, from years past (literally Ice age) to the modern days, clearly showing the connection between what people did then and now. It was very interesting to see how proud of their heritage the community is, and how they invite the visitors to engage with it.” (Fieldnotes, July 2021)

This pride in their community heritage was clearly seen in the outer isles as well, and indeed in conversations with the participants. The respect for the distinct identity of the island communities was illustrated by one of the interviewees, residing in the Mainland:

“...it wouldn't be right for me to say anything about their community. But I, I know that each of the islands has very distinct culture and community and identity and traditions as well, which I think is another thing that's part of Orkney's make up. Yeah. Is that there are all these differences as well. You can experience something quite different wherever you go.” (MI-29)

These distinct community identities are also manifested in the island-island relationships (Stratford et al. 2011), in day-to-day situations, as was brought by one participant, residing in Shapinsay. The participant described an argument that arose between two neighbouring islands regarding a ferry vessel that was taken from a route to one island and put on a route to another, leaving the first island “stuck with the old, the big boat” (MI-25). The participant remarked:

“I live on the isles, and isles are different, and people identify as coming from Shapinsay or from Rousey... So, you know, there's rivalries between the islands and the communities, but the communities are strengthened by this and each share each one.” (MI-25)

These island-to-island relationships are also observed by the willingness to travel to and between the outer isles of the archipelago for leisure purposes. Curiously, according to the participants, Orkney residents do not engage greatly in local travel. As was learnt from one interview:

“Yeah, but I think that's something that Orcadians do as well. Well, we don't always explore.” (MI-29)

In addition, another participant noted that this is often seen amongst the Mainland residents, who do not venture out to the isles:

“I have a problem with normally where people in Mainland Orkney have never actually visited any of the islands, they've only ever lived in Mainland Orkney. I find this incredibly frustrating.” (MI-10)

This is important since the perceived lack of interest by the Mainland residents towards the islands can create an image of division and disconnect, in the seemingly cohesive community. This is, however, not entirely what Baldacchino and Ferreira (2013) describe as ‘rivalry’ in their Azores case study (albeit some historic rivalry exists, as discussed above), where rivalries are between several islands in the archipelago, driven by their power in political, religious and cultural domains. In Orkney, the main contention point is the perceived exclusion of the outer isles from decision-making, predominantly conducted *by* and *for* Mainland, residents of which are sometimes accused of having perspectives that must be challenged (MI-10).

"I used to really feel really bad about it, if I had and islander [Westray] saying, you know, basically, nobody's really understood the North Isles from the central Orkney [...]. And the only thing is, after being involved in tourism for quite a while now, I'm slightly more inclined to agree that we do feel it's more centralised." (MI-13b)

In tourism context, this leads to disparity in investment in infrastructure and facilities, and thus unequitable benefits distribution from the large numbers of visitors arriving, mainly, to the Mainland. This subject will be unpacked further in Chapter 7.

The above discussion about island communities in Orkney is very brief, compared to what the relationships, identities and their manifestation in each island are (also acknowledged in 10.5). While these unique attributes merit separate in-depth research, this introduction is intended to set the scene for the discussion on their role in sustainable tourism development in Orkney.

6.5 Community as a whole

"I found it so fascinating, just that sense of community that just kept coming across everything in Orkney, something that I never knew to this extent." (Fieldnotes, July 2021).

Earlier in this section the differences between different groups and communities were discussed, based on the location (islands) and origin (natives and incomers). Despite the variety of backgrounds, it was clear that however 'community' is defined and wherever its members are coming from, is vitally important attribute of life in Orkney, and that there is one whole Orkney community.

"Community is quite defined, there is a very intense community spirit in Orkney." (MI-25)

As was discussed earlier in this chapter, pride in Orkney as a place and Orkney as a people was exhibited by the participants throughout the interviews, as well as informal conversations with locals. This passion was also demonstrated by the willingness to share such feelings and opinions about their community, which is vital for the relationship of local residents with visitors and, thus, tourism development in their destination. This and the attitudes of the residents towards

tourism will be explored further in Chapters 7 and 8. Here Figure 6.5 illustrates the word cloud of codes that represent the main attributes of the Orkney community, mentioned by participants.



Figure 6.5: Orkney community attributes (author)

Despite some differences, as seen throughout this chapter, the illustration shows that the attributes provided by the participants (and noted by the researcher) are positive, emphasising the welcoming and helpful character of the people of Orkney. It can be seen here that 'cultural and creative', and 'generous and welcoming' themes were most prominent. As one participant remarked:

"And I think there's a lot of creativity space opened up by [equal, egalitarian, caring community] as well, and you have these beautiful, you know, a culture of traditional music and things like that, you know, in art and you know, you have all these skills that are handed down. And I think. It, by default, having these sort of communities just opens it up, and I think that's what makes Orkney so rich and we're getting something right in Orkney in terms of culture." (MI-10)



Figure 6.6: Creative community in Orkney. Left: Creative Trail sign in Birsay. July 2021; Right: Arts and Crafts Fair, St Ola Community Centre, Kirkwall. June 2022 (author)

As was observed by the researcher herself, this creativity, driven by passion for Orkney, is cultivated from a young age, and proudly exhibited in community, heritage and art centres throughout the archipelago. For example, Figure 6.7 below shows the display of visual arts by pupils in local secondary schools, illustrating landscapes and places of Orkney, expressing their relationship with Orkney and its physical environment.



Figure 6.7: Local school pupils exhibition in Pier Arts Centre, Stromness. July 2021 (author)

On another occasion, the researcher reflected in her notes about her visit to the Rousay Heritage Centre:

“There was an exhibition of school pupils about “what is important and special about our islands?”. With beautiful drawings they told all the important things: the sea, our families and homes, the crofts and standing stones, the sea glass and the beach, the seals, the oystercatchers and our friends, the boat, the shop for food, the puffins and the flowers. And much more.”

(Fieldnotes, June 2022)



Figure 6.8: School exhibition in Rousay Heritage Centre. June 2022. (author)

In this exhibition, more emphasis was given on the sense of community, and the neighbours and amenities of their island, together with the surrounding nature. For the younger generation, it seemed, the physical and social environment of Orkney were developing as strong place attachment and place identity elements, forming their sense of place.

Generosity and the welcoming attitude of Orkney people towards each other and visitors were also noted by many of the participants. Throughout the interviews, the importance of this generous and welcoming image of Orkney came through clearly, whether explicitly in the answers, or implicitly within the narrative of the conversations. This attribute of the Orkney community is crucial for tourism development discussion, reflecting community attitudes towards tourism and their support for tourism development.

"[...] I think people often quite like meeting new people and welcoming them. I do think there's a sense of hospitality naturally within the islands. People are quite curious." (MI-26)

Several other attributes were mentioned by the participants, that are noteworthy. These include cohesiveness, despite the differences discussed earlier, and helpfulness of the community in a time of need, in line with Conkling (2007). Open-mindedness and innovation were also mentioned, but at the same time community that is traditional and conservative at times, when "but it's always been done like that" and "but it's never been done like that" are, according to one participant, the "twin curses" (MI-12). As another participant put:

"One of the biggest phrases you'll hear in any island community and Orkney is no different is 'we've always done it that way'. So there's no need to change. We've always done it that way and it's worked." (MI-25)

Understanding these attributes is significant when discussing sustainable tourism development. Such attitudes to change can facilitate or obstruct sustainable tourism development. On the one hand, seeing change as a threat to their place identity (Peng, Strijker and Wu 2020) can affect residents' perceptions towards benefits and impacts of this change (in the case of this thesis – tourism growth), which in turn impacts residents' support for tourism development (4.3). On the other hand, as observed by Baldacchino (2006b), a conservative approach to change, including tourism development, can, in conjunction with weather and distance of cold-water islands, lead to more controlled, more valuable and low impact tourism.

Another attribute that is connected to the traditional and conservative traits of the Orkney community, and derived from the geography of the archipelago, is that each distinct community in Orkney, and the Orkney community as a whole, is its smallness. This comes with several challenges, for the community itself and for its image towards outsiders, which is more relevant for this discussion. While some participants expressed a somewhat humorous complaint about "everyone knows what everyone else is doing" (MI-29) in a small island community, one participant described her experience of questions asked about her community by some outsiders:

"And you know, I remember being asked as a young child, 'oh is everyone inbred here?'... 'Oh wow, there must be more cows and sheep here than people?' And, you know, very obvious questions, you know, and always 'everybody related to each other?', and you think, 'Oh, these are interesting questions'. So I grew up with that kind of thing. 'And do you have electricity there? Do you have running water?' Yes, we do. Yes, we do." (MI-10)

While the participant generously exhibited tolerance and understanding towards such remarks during the conversation, she also noted that "people can be very unthinking", and that in her opinion "that is damaging" (MI-10). Acknowledging this issue with the perception of small island communities by outsiders, including visitors to the islands, is vital. This corresponds to a minority of studies on islands, that argue that the one-sided representation of islands as 'vulnerable' in any connotation of the word (Campbell 2009), can undermine their initiative to define and meet their own development needs (Scheyvens and Momsen 2008).

An additional aspect of the Orkney community is its overall active participation in Orkney life, awareness of what is taking place in their islands, and also being generally very busy. As with many other small, and especially island communities (Baldacchino 1997; Baldacchino 2012), the Orkney community is characterised by people "wearing multiple hats" (MI-27; Fogle 2023).

"Many people in the islands have more than one job and one of them is usually tourism." (MI-15)

As was mentioned in 5.4.1.2, it was difficult to put the participants into 'boxes' of private, public and third sectors, as was initially intended during the design of this study. During the conversations, and as familiarity with the participants developed, it was clear that many had several occupations and roles in the Orkney community. Many participants indicated tourism as a primary or secondary occupation, and some participants indicated three or more roles, some of which are voluntary. This attribute of the Orkney community is important in the quest to understand it in the context of tourism strategy and sustainable tourism development. Firstly, it alludes to the importance of economic sustainability individually and collectively, and the need to diversify income, where tourism plays a major role.

“And then I decided the farm probably needed to diversify a wee bit, for something else, to give the farm the best stability in the future.” (MI-24)

“I guess the advantage that Orkney has is that many people wear multiple hats and understand the other sectors and new perspectives.” (MI-27)

Secondly, while this means that the degree of interest and involvement is high, it creates limited availability for any additional voluntary activities and limited resources to implement change, especially at the grassroots. One participant, discussing this subject, explained that while devolvement of decision-making and change implementation to the communities is the most effective way to do it successfully, this must come with appropriate resources, since there might not be any more capacity for volunteering.

“[...] that's another sort of problem in a community like this [small island community], is that everyone who is volunteering is already volunteering so much that they probably can't really take on anything else.” (MI-26)

Indeed, during the recruitment of participants for this study, members of third sector and community organisations were invited to participate, however, none agreed, explaining it by referring to volunteering workload and deprioritising tourism over other social issues (5.4.3).

6.5.1 Power in Orkney community

Several interesting conversations about who has the power in Orkney community took place during the interviews. The concept of power constitutes one of the themes discussed in Chapter 7, however here some of the main points are included, to introduce the concept of power and its manifestation in Orkney.

Similar to Frisvoll (2012 p.449), who defines power as “something that is insinuated throughout all social activity” (3.2.4), Orkney society exhibits “power as entanglements”, albeit manifested somewhat differently from Frisvoll’s study. Here, power can be found in many aspects of Orkney, such as cultural power, geographical power, organisational power, power in wealth, and power in *loud voices*. Including these attributes here is important, since it enriches the understanding of the communities in direct impact from tourism development and those, whose sustainability needs the strategy aims to address.

6.5.1.1 *Social, cultural and political power*

For example, speaking with passion about a small island community they belong to, one participant reflected on its social and cultural power structure:

“You know, I think, right, retired women run the world in terms of cultural activities. You know, they make everything happen. They take on the emotional work, they take on the organisational burden... But in a way that is the driving force behind a lot of what happens in the community, and it's really cohesive, really working well together.” (MI-10)

The participant also described Orkney society as egalitarian, where everyone is valued and contribute to the community equally and cohesively. Thus, in the participant's opinion, the power lies in the cohesiveness of the community, and this is what makes living in Orkney “worthwhile” (MI-10). However, the egalitarianism and cohesiveness of communities in Orkney are at times challenged by ideas of class division, based on wealth, which affects the development of Orkney in many areas, including tourism. This was noted by several participants, with one of the interviewees referring to the effect such manifestation of power and wealth can have on Orkney society.

“I don't really want to go into the realm of plots, but I think there are some significant powerful stakeholders in Orkney, who would quite like to see Orkney go fully, a lot more independent in its own way, in the same way as perhaps the Channel Islands or the Isle of May. I can see that they would appreciate considerable deregulation. And particular a reduction in taxes.” (MI-14)

In the participant's view, this would increase the class divide in Orkney, by attracting more wealthy residents and impacting the less wealthy communities. Acknowledging that this is currently happening only on a micro-level, the participant argued that such a divide is already taking place in Orkney, with less wealthy residents existing “to more or less serve the needs of the very wealthy” (MI-14). This type of power can impose its ideology onto deciding on the strategic direction, as explained by Tribe and Paddison (2023).

Curiously, at the time of writing up this section of the thesis (July 2023), Orkney Islands Council voted on a motion to explore “alternative forms of governance”,

referring to those that will give Orkney greater autonomy, such as the models of Denmark's Faroe Islands, or UK's Channel Islands (Orkney Islands Council 2023c; BBC 2023). This, according to the Council leader James Stockan, is triggered by the failure of both Scottish and UK governments to support Orkney equivalently to its contribution to the national wealth (referring to its role in the energy industry), especially on the subject of ferry fleet replacement and Road Equivalent Tariff (BBC 2023). Mr Stockan also emphasised Orkney's Nordic heritage and greater alignment with Nordic societal norms as a reason for the motion:

"Our culture, the way we operate, is a very flat society, is a very inclusive society, very much reflects what I find in the Nordic countries, and I would say that that, really, puts us in a different place". (James Stockan, Reuters 2023).

Interestingly, this both supports and challenges the participant's point above. On the one hand, the need for more autonomy is overtly explained by the need to strengthen the financial position of Orkney, potentially empowering those with wealth and oppressing those without. On the other hand, the apparent reason for this is to improve services used by all members of the community (e.g. ferries), thus advancing the social wellbeing of everyone, while also demonstrating the need for decentralisation and supporting the inclusiveness and cohesiveness of Orkney society.

Political and strategic power, according to the participants, is a significant element in Orkney, with the needs of the main centres of population (Kirkwall and Stromness) often at the forefront of policy, development and investment, as well as strategic planning, including tourism.

"But then in terms of who has the power geographically, you know, there's a lot of centralisation. Of course, you talk about centralisation in Scotland, but it's the same in Orkney. The power is in Kirkwall. Stromness are, you know, quite powerful too. But, you know, there's that sort of push and pull of power in those areas. And then, of course, islands are left behind or forgotten about." (MI-10)

Saito and Ruhanen (2017) identify such power as 'coercive', often attributed to public sector agencies (3.2.4). Indeed, Orkney Islands Council possesses a high

level of decision-making power, attributed to the necessity for the public sector to provide stronger support in remote rural areas (Fraser of Allander Institute 2020). Consequences of such centre-periphery relationships in Orkney will be discussed further in Chapters 7 and 8, to explore how they manifest in tourism development.

6.5.1.2 Organisational power - Destination Orkney Partnership (DOP)

Geographical power is closely linked with organisational power, since the physical location of an organisation with power and agency is often in the centres of population, directly contributing to the complex power dynamics between the centres and their peripheries (Bardolet and Sheldon 2008; Favole and Giordana 2018). In the tourism context in Orkney, the organisations holding the power to make decisions on the strategic direction are the members of the Destination Orkney Partnership (DOP), introduced in 1.2.6. The DOP operates on two levels: Lead Officers Group (DOLO) on an operational level, and Strategic Partnership Group (DOSP) on a strategic level, selecting the chair for each group on a rotating basis. While the partnering organisations separately have the power and agency to deliver the strategy, the DOP partnership itself is an unconstituted organisation, and it is not formally assigned any executive powers, apart from “shared vision and a common interest in the management of the destination” (Destination Orkney Partnership 2022b). The decisions are made by consensus, however, the final approval and implementation are decided and managed by each partner organisation separately, within its remit.

This means that while the DOP has the potential to realise the benefits of a partnership approach in strategy *development* (Farmaki 2015; Weaver 2010), it is criticised for the lack of leadership as well as accountability for its *implementation* (3.3), leading to lack of trust in it by some, especially to develop and implement the strategy and sustainably manage the destination. As one participant noted:

“But what seems to be going on is that pass the parcel, that no one wants to take on the responsibility for doing any particular elements.” (MI-25)

This situation is exacerbated by a notable power imbalance between these organisations within the partnership, influenced by the ‘induced’ power (3.2.4) of

those organisations (OIC, HIE, VS) that possess the agency to realise (or not) the chosen strategic direction (Saito and Ruhanen 2017). This power is largely established by the availability of financial resources to fund activities, such as infrastructure development and marketing. In combination with the 'coercive' power of OIC (Saito and Ruhanen 2017), this influences the sustainable development of tourism in Orkney.

Nonetheless, one of the main strengths of the partnership between these organisations, is that despite some of the organisations being regional (HIE) or national (VS, HES), the representatives reside locally (MI-05). Indeed, throughout the interviews with the representatives, their passion for Orkney and Orkney's tourism was clearly observed, and the participants exhibited a high level of awareness and understanding of the issues in Orkney's tourism. However, the views on tourism in Orkney are varied, and perceptions of tourism value are often conflicting and complex (Chapters 7,8), and it is the role of the partnership, and the organisations they represent, to ensure that the complexity is addressed in the most effective way in the Strategy.

6.5.1.3 Power of individuals

While the sources of power, discussed above, stem from communities, organisations and resources, individual power was also recognised, in line with Reed (1997).

"It's such a small community, individuals have a lot of influence. [...]. And you know, you have such strong reputations and respect, high levels of respect for individual people, like local celebrities. But you never call them that, because that's a bit too extreme, but just very 'weil kent folk'²⁰ type of faces, and they have a lot of power." (MI-10)

Another type of individual power was recognised by participants in, so-called, "vocal locals" (MI-04). In this case, some members of the Orkney community, with no particular means to support their power, other than their passion for various issues in the community. These are the individuals who will often engage

²⁰ In Scots and its dialects – "well known people".

in surveys and consultations, overpowering the voices of others with more assertive position (MI-04).

Beyond official consultation, such individual power is often exercised on social media, predominantly Facebook, where topical discussions often take place (MI-11; MI-17; MI-18; MI-22; MI-23; MI-28; MI-30). It appears to be able to empower many members of the community while creating a disconnect with others, who do not engage with social media:

“And really interestingly, with social media, that's just changed the landscape, has added a different dimension. And that sort of shifting the ground a little bit.” (MI-10)

In this remark, the participant referred to the change in power dynamics that social media brought about, with power shifting from the reputation and respect to those who are more prominent on social media. Changes in power dynamics due to social media were also observed in other rural locations by Senyao and Ha (2020). The authors confirmed increased influence on tourism decision-making by the residents, active on social media, counteracting the traditional power of local government.

All these elements of power and their dynamics within the Orkney community and beyond, are an important component in this thesis. As will be seen in Chapter 7, power is a key element that drives placemaking activities in Orkney, often increasing the contested nature of tourism development in Orkney, and affecting its sustainability.

6.6 Place identity and sense of place

“So yeah, it is a pretty magical place.” (MI-28)

Seemingly, place attachment, driving pride and passion among the incomers, is arguably stronger than that of native Orcadians themselves. To quote Putz (1984 p.26) in Conkling (2007 p.198): “one can be ‘converted’ to islandness, and he observes that he, ‘like all converts, burn[s] with a harder flame for island institutions and values than does the natal experience’”. However, as can be concluded from this chapter, this passion towards their “new” island home is neither stronger nor weaker, but different, rooted in different constructs of the

sense of place, experienced by different groups of residents, in line with Soini, Vaarala and Pouta (2012).

As was seen in 6.3, these attributes of Orkney also lie at the basis of place attachment, however, strong place attachment does not automatically assume strong place identity, especially in its person-centred sense, whereby the origin of the person will to an extent determine it (Hernández et al. 2007). In its place-centred sense, however, it could be seen that the place identity of Orkney was strongly developed in all participants, manifested in their passion for Orkney, the clear idea of what Orkney is and how it should be (albeit varied between the participants, as was already discussed). For example, one participant, an incomer, remarked on the perceived value and importance of Orkney in the minds of its residents:

“We're very good in Orkney thinking we're the centre of the universe. Which we are, obviously.” (MI-12)

This remark is important, since it attests to the strong place identity (“we”, “the centre of the universe”), which can be seen as a catalyst for higher interest and participation in matters that concern Orkney’s communities, including tourism development (Lewicka 2008). While this is seen as a positive outcome of such a strong place identity, it can also contribute to *them and us* feelings, when only what is best for Orkney matters. This was noted in one interview, when a participant, discussing the council’s plans to develop more onshore windfarms in Orkney (7.1.1), remarked:

“Or go to Caithness, no one lives in Caithness, no one would notice. Stick up 20 turbines in Caithness and call it the Orkney Windfarm. Do what you like.” (MI-23)

In another example, a participant referred to the lack of visitors during COVID-19 restrictions, which resonated with older generations (8.2), since it matched their place identity, but contradicted one in younger people’s minds:

“So I think there's a lot of closely held ideas of how Orkney should be, and that is tied in with that kind of peacefulness and that that feeling of the environment around them and how busy it is. And for younger people, all they've known as heavy tourist season in the summer, that is their lived

experience of their youth. [...] And I think it was a change for them. Big change. You know, I think, you know, this was a huge shock.” (MI-10)

This confirms several arguments found in the literature. Firstly, it was observed that Orkney's identity in the minds of people was affected by their perceptions of the past, present and future, as argued by Paasi (2001). Accordingly, the participants referred to attributes of Orkney's identity in the past (“for the older demographic, it was a bit more like home” (MI-10)), images of the present (“[t]he quality of life here, the standard of life, our freedoms, our ease of transport” (MI-23)), and utopias of the future:

“It's not unreasonable by 2030 to think that all our ferries, all our aircraft and all our cars will be electric or hydrogen, or both.” (MI-09)

Secondly, it can be argued that the strong place identity of Orkney (however it manifests) in the minds of its residents may be triggered by a feeling of threat from events and developments, that contradict this identity, as noted by Peng, Strijker and Wu (2020). Concern for the inevitable change in the community has been expressed by another participant:

“And it's just a real, everyone will help everyone out really. And that's really lovely. So I think it is different to the rest of the UK at the minute. But whether that will change is... As I say the world gets smaller. That might change. It might become more metropolitan, a little bit more disconnected. But at the moment, I think that everyone's very connected to each other.” (MI-30).

The potential identity contradiction affects the sense of place, when the event or development is perceived as a threat to attributes of Orkney at the foundation of place attachment, challenging the emotional bond with the place, as well as its identity – both constructs of the sense of place (Jorgensen and Stedman 2006). Moreover, since sense of place is the endowment of a place with value (Mulvaney, Merrill and Mazzotta 2020), it can be argued that development that does not align with these values creates negative attitudes towards it among those, whose sense of place was affected (Chapters 7 and 8).

6.7 Conclusions

This chapter introduced the diversity of people in Orkney, and their relationship with Orkney as a place, to form a basis for the subsequent analysis. The discussion highlighted the complexity of views and opinions, wants and needs, reliant on various factors, such as the reason for being in Orkney, the level of engagement in the community and power dynamics within it. It begins with a discussion of sustainability as a concept, from which two insightful conclusions can be made. Firstly, and in line with literature (1.1), sustainability does not have a universal meaning, even in the small community of Orkney. Ranging from abstract definitions of 'ensuring the future' to more applied descriptions, such as 'renewable energy', many agreed that it is important to recognise the complexity and plurality of meanings, and also consider the context, in which the concept of sustainability is discussed (Grenni, Soini and Horlings 2020; Chapin and Knapp 2015). As such, some argue that in the context of an archipelago, 'sustainability', at least in its environmental pillar, cannot be achieved.

Secondly, this complexity and plurality of, at times contested meanings, creates difficulty in producing a comprehensive inventory of the sustainability needs of Orkney, agreeable to everyone. In line with Chapin and Knapp (2015), heterogeneous communities, such as Orkney, are often characterised by contested opinions on the use of resources, leading to different opinions on the meaning of sustainability. To deepen this understanding, the discussion turned to introduce the people of Orkney. It was revealed that place identity, in its place-centred and person-centred senses, is a significant factor in what Orkney people perceive as the most important attributes of Orkney. Moreover, it was discussed that despite the diversity of identities, there are attributes of Orkney that drive place attachment of its residents, related to the Orkney community as a whole. In line with the discussion in 4.1.3, this chapter demonstrated that considering sense of place of Orkney residents, rather than their place attachment or place identity is more useful, since it encompasses both (and more) concepts, as illustrated in Figure 4.1, and provides room for interpretation and critical discussion. It allows for the diversity of Orkney people, and the diversity of their relationship with Orkney as a place, to reveal a complex entanglement of identities and attributes of attachment, place dependencies and

place satisfactions, and a plethora of other elements, that other authors considered (Chapter 4). While such a position might displease those who approach the complexities of life in a purist positivist fashion, it might as well satisfy those authors who call for an interpretive approach. An approach to untangle the complexities of people's relationship with their place, and their perceptions of the value of tourism development, by asking *why* and *how* (see Sharpley 2014; Deery, Jago and Fredline 2012; Smale 2006).

Nonetheless, many of the attributes of the sense of place were seen in other destinations. For example, Lecompte et al. (2017) found many of the same physical attributes at the basis of the sense of place in one coastal community in Brittany, and Campelo et al. (2013) revealed more social attributes, such as time, ancestry and community, in their study of Chatham Islands. Moreover, many of these attributes are underpinned by the concept of islandness (2.3), as a relationship between islands and archipelagos, and people who inhabit them, founded on the characteristics that are commonly relatable across different island communities (Conkling 2007).

However, while many of the attributes are common in many places, it is how their *permutations* shape the sense of place in each contextual setting is the most important (Campelo et al. 2013). In Orkney, as was revealed in this chapter, the plurality of identities and diversity of communities and geographies, create a unique combination of physical and social attributes of sense of place, shaping Orkney as a discrete layer of context, reflected in the sense of place of its residents.

Here it is vital to remind the reader, however, that this analysis is not intended to generalise any of the opinions presented here to the entire population of natives or incomers, or other groups of residents in Orkney. As discussed in Chapter 5, case studies are not intended for statistical generalisation from the case they present, but for analytic generalisation from the study itself (Yin 2018). Such distinction can also be applied to this specific analysis of the variety of opinions, which merits cautions analytic generalisation, rather than claim any statistical applicability. Therefore, indeed there will be a plethora of other opinions within the Orkney community about what Orkney is or should be. Thus, it is possible to illustrate this understanding as a continuum, where how Orkney

is perceived by its people and the variety of attributes that contribute to Orkney's sense of place are positioned between Orkney as people and Orkney as a physical place (Figure 6.9).

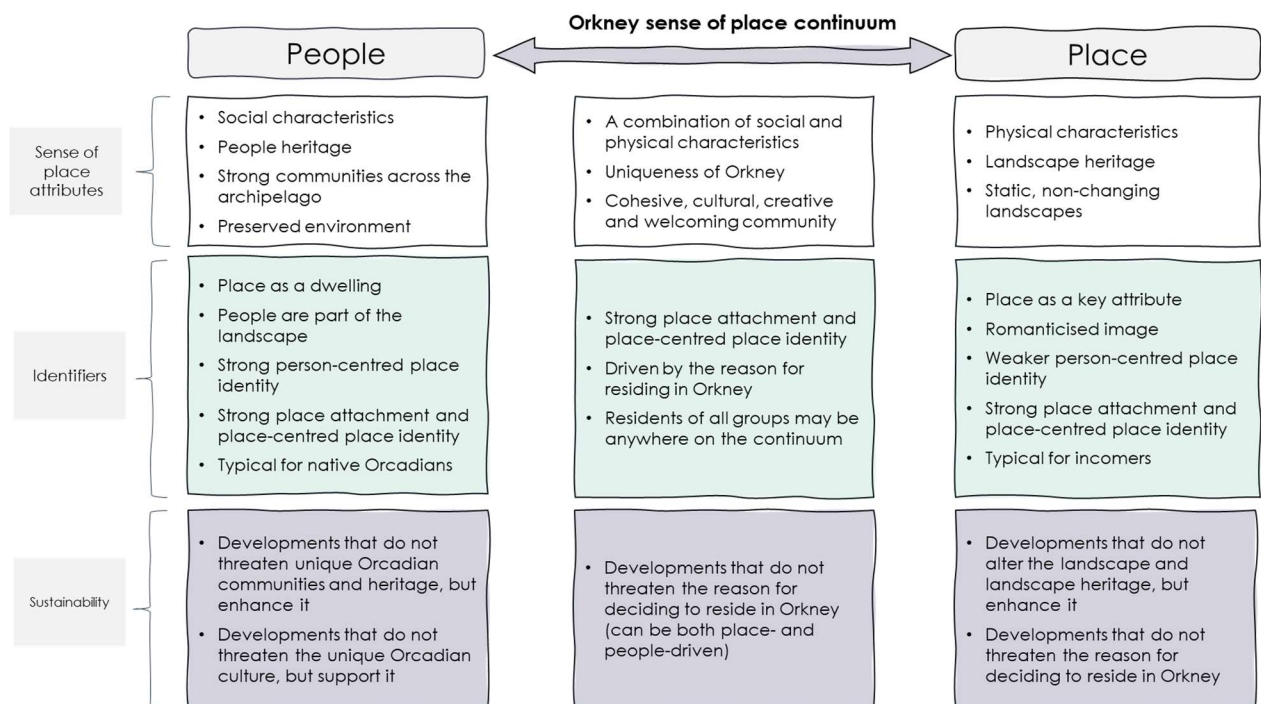


Figure 6.9: People-place continuum (author)

The discussion in this chapter also contributes to understanding what might be deemed sustainable for Orkney residents, based on their sense of place. While specific aspects of it will be discussed in the following chapters, the above continuum illustrates the overall sustainability meaning, amounting to alignment to the sense of place of Orkney people. This illustration also signifies the complexity of voices heard in such a diverse community, all equally passionate, but some very contradictory in how this passion should be implemented. Here it is worth remembering the argument by Peng, Strijker and Wu (2020), where residents' place identity is exhibited more profoundly when it is threatened by change.

"I was born and grew up here, and the changes in my lifetime have been remarkable. And so it's kind of like, well, where is it going to end." (MI-11)

This can explain the overall strong and passionate expression of sense of place by all participants, regardless of their origin, leading to the emergence of the

contested Orkney. This contested nature of Orkney will be reflected in subsequent discussions in this thesis, affecting the residents' perceptions on tourism, their relationship with visitors and, subsequently, their support for tourism development and the Strategy.

CHAPTER 7

Tourism and Placemaking

Tourism is one of the activities that contributes to the economic resilience of Orkney in a changing world (1.2). In practice, tourism development in Orkney often manifests in placemaking, in its tangible and intangible forms, such as marketing and promotional activities, as well as infrastructure and tourism product development, corresponding to Halfacree's (2007 p.127) "formal representation of the rural" (2.1). While these efforts are targeted at growing the important tourism industry, they might not always align with the sense of place, experienced by other members of the Orkney community.

This chapter, therefore, introduces the most prominent features of Orkney's tourism product as placemaking elements of Orkney, which are reviewed against the sense of place, expressed by participants throughout the interviews (Chapter 6). The placemaking elements in this chapter refer to the tangibility scale, devised by Lew (2017 p.456), as presented in Table 4.1, distinguishing between tangible, mixed and intangible placemaking. While the scale, presented by Lew (2017), applies to both bottom-up organic place-making and top-down planned placemaking, or any combination of both, here the main features of planned placemaking are demonstrated (4.2).

The reason for this is twofold: firstly, Lew (2017) observed that most of the placemaking in tourism is planned placemaking, emphasising its intangible elements, such as marketing and branding, and driven by a high degree of government involvement; secondly, the purpose of this discussion is to ascertain the alignment between the sense of place of Orkney people (Chapter 6) and the development direction, driven by those with power and agency (placemaking). It is argued here that understanding the relationship between the two 'places' (sensed and made) is the basis for understanding the sustainability needs, unique to Orkney as a place. Consequently, it is the role of the strategic planning for sustainable destination development to ensure it is aligned with these needs and reflects the values, attached to it by Orkney community members.

7.1 Placemaking and tourism product

Before proceeding to the placemaking discussion, an introduction to Orkney's tourism product is presented, from the point of view of the participants. Throughout the interviews, the interviewees reflected on what characterises Orkney's tourism product. Figure 7.1 illustrates these reflections in an NVivo word cloud²¹.



Figure 7.1: Orkney tourism product word cloud (author)

It can be seen from the illustration, that the participants deemed it important to emphasise Orkney's people, history and culture, the uniqueness of Orkney, and

²¹ 50 most frequent words of 6 letters and longer, excluding stop words, in references coded to 'Tourism product' code in NVivo.

the quality of tourism product. Participants also reflected on nature and landscapes as tourism product, emphasising that it is the combination of nature and culture, that makes Orkney what it is:

“It's our environment, this one of our biggest assets, but it's natural environment or the cultural environment. And the reason that people come to places like Orkney is they want to see unspoiled nature, and they want to see unspoiled, I'm calling it culture.” (MI-22)

Another participant explained:

“[...] our tourism product is, from my perspective, as a wildlife tourism operator, the natural history, the landscape, the seascape, and the archaeological sites and all the cultural sites. So it is a very special place and it's the combination of all these things that makes it so special. There's not just an actual history, and it's not just the archaeology, and it's not just the landscapes, it's everything together. So it's a kind of a kind of holistic picture.” (MI-09)

Many of these features correspond to the attributes of the sense of place, experienced by Orkney people (6.7), with some of the features attest yet again to the contested character of Orkney (such as unspoiled landscapes vs renewable energy). The following sections will discuss these issues in detail.

7.1.1 Industrialisation²² of the landscape

As was noted in Chapter 4, physical environment plays a significant role in place attachment and sense of place, in addition to the emotional component of these concepts (Stedman 2003). Indeed, Chapter 6 demonstrated that physical characteristics of Orkney, dominated by its landscapes, are a major attribute of place attachment, place identity and sense of place, ascribed to Orkney by its people. Therefore, the alteration of landscape due to industrial development, including tourism, can create dissonance with the sense of place, especially for

²² In the context of this discussion, industrialisation refers to development of industries, heavily reliant on infrastructure, which, in Orkney, applies to the energy sector, with emphasis on renewables, and farming industry, as key drivers of the Orkney economy (1.2.4).

those who assign higher importance to the physical attributes of Orkney, on the place-people continuum (Figure 6.9).

Nonetheless, industrial development has been an influential factor in Orkney for millennia, with agriculture and farming dominating the Orkney landscape since Neolithic people resided in these islands (Ritchie 2003). In modern times, it is the renewable energy industry that spreads its influence across Orkney, including its rural landscape. As discussed in 6.1, the definition of sustainable often includes both (or either) elements – renewables and landscape, which can be contradicting, since those valuing static unchanged landscape (Soini, Vaarala and Pouta 2012; Plieninger et al. 2018) often oppose its use for renewable energy projects (Plieninger et al. 2018; Hateftabar and Hall 2023). Industrialisation, therefore, has an impact on tourism product, as well as the sense of place of Orkney residents.

7.1.1.1 Renewables and tourism product

Orkney is currently experiencing several developments in a variety of industries, including the renewable energy industry and infrastructure, that are required for its growth (Fraser of Allander Institute 2020). These developments are driven by the aim to grow the economy, strengthen communities and develop infrastructure, as well as to meet the net-zero target of 2030 (Orkney Islands Council 2023b), which is ambitiously higher than Scotland on a national level.

During the interviews, participants²³ reflected on the impact the current expansion of infrastructure-intensive sectors in Orkney has on its landscape. Most of the interviewees welcomed the opportunity for Orkney to become a leader in renewable energy and its 'green brand' (7.2.3), at the same time acknowledging the impacts these developments have on Orkney as a physical place. However, several interviews highlighted the frustration some residents have with these developments, especially onshore windfarms:

²³ Among all respondents who normally reside in Orkney (30 out of 32 participants, 94%), only 7 (23% of those) reside outside the Mainland (Appendix 9), where most of the industry developments is taking place. Therefore, all reflections on the topic of industrialisation were obtained from those who reside in the Mainland.

“We are talking about the complete industrialisation of the countryside and then on top of that, at least four or five locations these massive, overbearing, soul destroying and sky destroying turbines.” (MI-23)

As was discussed in Chapter 6, landscape plays a key role in sense of place of many Orkney residents, which was also observed in other island destinations. In the Faroe Islands, for example, residents placed a high value on their “untouched, unspoiled and therefore natural” landscape, with renewable energy development identified as a major threat to these landscape values, after tourism (Plieninger et al. 2018 p.166). These concerns are driven by the perceived impact of the development on the residents’ sense of place, which it is rooted strongly in the visual aesthetics of the place (Hateftabar and Hall 2023; Sæþórsdóttir and Ólafsdóttir 2020).

As also observed by Hateftabar and Hall (2023) in other studies, these frustrations are exacerbated in the proportionality between the benefits and impacts of such developments, and therefore what is perceived to be their value to local communities. For example, the development of large windfarms in Orkney takes place against the backdrop of fuel poverty, and very high energy prices, due to weather, old housing stock and lack of mains gas provision (Fraser of Allander Institute 2020).

“Council opening up a wind farm just outside Kirkwall, which is going to be a tremendous shock to the landscape, you know, and the scenery in the place. But we already generate more electricity than we can use here. And it doesn't benefit anyone other than the people who own the wind turbines who make a lot of money of them. But the fuel poverty in Orkney is some of the highest in the country.” (MI-11)

Consequently, as another participant argued, the negative attitudes about such developments could be negated by delivering a direct benefit to the communities:

“People complain about wind turbines. They complain about them ruining the view. But if everybody in Orkney had extremely cheap or even free electricity, you can guarantee that those complaints go right down. So it's the same thing [with tourism], you need to keep the benefits here in Orkney.” (MI-14)

This agrees with Sæþórsdóttir and Ólafsdóttir (2020), who observe that residents can improve their perceptions and support towards industrial changes to their landscape if they receive a clear economic benefit. As will be seen in Chapter 8, where benefits, impacts and values of tourism are discussed, tourism development experiences similar issues, whereby the lack of clear and explicit benefits to Orkney communities creates a more negative perception of tourism value, and therefore negative attitudes among many community members.

Whether it is tourism, or any other development, that has the potential to affect the sense of place, its benefits were questioned against sustainability principles, emphasising the prevalence of economic benefit, and deprioritising social and environmental impacts. As one participant noted:

“And I think with some of these big developments that are being pushed at the moment by the council, it's always the economic benefit or perceived benefit is like a kind of main driver. And then you know that there'll be some mitigation, probably afterwards in terms of environmental mitigation, but yeah, I think it's interesting.” (MI-19)

This aligns with the wider literature critiquing the triple bottom line concept (TBL) in sustainability, whereby by seeking balance, or trade-off, between the three pillars, economic needs will usually prevail and be prioritised (Hunter 1997; Bramwell and Lane 2011; Hall 2011b). As will be seen in 7.3, the outcome of this trade-off is based on the concept of power, where those with power to decide what benefits and values prevail, and those with agency to deliver the developments (which are often the same actors), have the ultimate control over the strategic direction and sustainability of the place.

Nonetheless, some viewed the development of the renewable sector as part of Orkney's tourism offer. To illustrate the connection between uniqueness, nature, sustainability and renewables, one interviewee opined that visitors now look for sustainable attributes of a destination, represented by physical features, such as power generation on buildings and other renewable energy attributes (MI-17). This again points to the contested meaning of 'sustainability', discussed previously. Moreover, the interviewee explained that discussions are ongoing about the creation of renewable trails and adding renewable energy to museum exhibitions, as it is seen as a part of Orkney's culture (MI-17).

To investigate this further, during the observations, the researcher decided to visit a place, where nature, views, archaeology and a wind farm coexist, to visually understand the concerns of some participants regarding the impact on the landscape, but also the relationship with the tourism product. Figure 7.2 pictures the Barns o' Ayre wind turbines, at Point of Ayre in East Mainland, near Newark Beach, and a complex and endangered archaeological site (Orkney.com 2022).



Figure 7.2: Barns of Ayre wind farm, East Mainland. June 2022 (author)

From the researcher's perspective, the turbines did not have a profound negative impact on her sense of place, and quite the opposite, they were seen as integral to the landscape, and not diminishing from it. In her field notes, the researcher wrote:

"The wind turbines were giant, creepy and beautiful, the views were spectacular, the flowers were plentiful and there was even some²⁴ archaeological site there" (Fieldnotes, June 2022)

However, it was also reflected that such an opinion might be because the researcher has not seen this site *without* the windfarm previously, and her sense of place was originally developed *with* the windfarm present. This supports a

²⁴ The significance of the Newark archaeological site was understood by the researcher later, when she came across a special exhibition at the Orkney Museum about it.

finding by Prince et al. (2023), where tourists, who are used to the wind turbines in their home landscape, react more positively to them when they travel.

Some literature touches on tourists' perceptions of landscapes and wind energy installations. Hateftabar and Hall (2023), for example, observe that some visitors perceive wind turbines as distinctive features on the landscape, contributing to its character. Moreover, Prince et al. (2023 p.15) also find that tourists accept wind energy infrastructure as symbols of "rural eco-modernity and sustainable consumption", in the landscape that is bound to change from the "norms of idyllic rurality" into "terrains of global sustainability". From a tourism product perspective, therefore, it is argued that the presence of wind turbines in rural landscape does not usually affect destination choice and intention to re-visit it (Prince et al. 2023). Consequently, the development of renewable energy in the landscape may have a positive effect on tourism, albeit contesting the sense of place of some residents.

7.1.1.2 Farming sector and tourism product

However, it is not only the renewable energy sector that is seen as a contributor to the landscape and physical environment in Orkney. As was introduced in 1.2.4, Orkney's farming industry is one of the strongest economic sectors in the archipelago and thus has a profound effect on Orkney's landscape. The prominence of the farming industry in Orkney is notably different from other Scottish counties, particularly its northern neighbour Shetland, which mostly relies on marine sectors for its subsistence (Butler 1997). The reason for this lies in the climatic and geological attributes between the two northern archipelagos, eventually affecting the soil fertility and providing more opportunities for the land-based economy in Orkney, such as agriculture and livestock farming, than in Shetland (Butler 1997). This difference is reflected in what is traditionally said about it in Scotland – Orcadian is a farmer with a boat, and Shetlander is a fisherman with a croft (Coull 2003; Butler 1997).

This distinct feature contributes to the uniqueness of Orkney in the eyes of its inhabitants, and adds to their sense of place in the form of its landscape, constituting not only the essence of Orkney, experienced by its people, but also

Orkney's tourism product. As a participant from the farming community remarked:

"But they [tourism sector] also need a strong farming sector to run alongside, because if we didn't have a strong farming sector that makes the island look the way it is, we wouldn't get the tourists either, you ken²⁵. I think the two is very important together." (MI-24)

As explored in 2.3.1, landscapes and open spaces, alongside outdoor activities, contact with nature, culture and traditions, and opportunity to spend stress-free time in an 'authentic' environment, are the main attractions of rural tourism (Kastenholz et al. 2012; Fytopoulou et al. 2021). Around the world, however, the rural landscapes transitioning from places of production to places of consumption (Ploeg and Marsden 2008; Mcareavey and Mcdonagh 2011). Orkney, while still holding onto its agricultural essence, is not an exception to this change, as noted by Lange (2006). These landscapes, and the history and heritage embedded in them, therefore, are packaged for tourist consumption (Lange 2006), as evident from various areas on the Orkney.com website (such as Orkney.com 2023d) and @visitorkney Instagram account (VisitOrkney 2023a).

Indeed, the majority of places outside the main settlements, except for RSPB reserves²⁶ and other protected areas, are covered with agriculture and livestock fields. These dominate the landscapes almost everywhere, including in and around most notable visitor sites, as illustrated in Figure 7.3 below.

²⁵ In Scots and its dialects - "you know".

²⁶ Royal Society for the Protection of Birds



Figure 7.3: Cattle and fields surrounding Maeshowe Chambered Cairn, UNESCO WHS. June 2022 (author)

Flat and treeless landscape, constructed of farmland, also dominates many of Orkney's outer islands, such as Sanday, illustrated in Figure 7.4 below.



Figure 7.4: Sanday landscape. June 2022 (author)

When visiting Orkney in 2022 (5.4.2), the researcher observed a curious manifestation of the relationship between farming and tourism product, illustrated in Figure 7.5 below.



Figure 7.5: Group of visitors at Stones of Stennes. June 2022 (author)

The Stones of Stennes site (part of the UNESCO WHS) is situated on a private farmland, where sheep are grazing freely among the ancient monuments and visiting tourists. The sheep, therefore, became a visitor attraction in their own right, and it seemed that some visitors found them as interesting as the stones themselves. The researcher reflected:

On my second visit to the Stones of Stennes that year, I was specifically looking to photograph sheep among the stones, rather than explore the monument and its history, and a late afternoon on a no-cruise day provided me with such an opportunity to have the site entirely to myself. While the stones are majestic and fascinating, the sheep were definitely more attractive to me personally. Reflecting on this experience, I found it interesting that as a visitor I was somewhat undervaluing the Orkney heritage in this way, potentially creating a conflict between my motivation and some residents' sense of place (8.2.2.1). On the other hand, however, I was also acknowledging that the Orkney landscape has diverse use by many groups of its communities, and having an interest in it, as a foundation for the farming industry, may as well align with the sense of place of many Orcadians, who see Orkney's landscape not only as a heritage that needs preserving (see Lange 2006), but as a 'working' part of Orkney life (6.3.4). For that particular visit, however, I decided to put my researcher's hat down and enjoy the visit as a tourist, for whom sheep are just exciting photography subjects.

Vignette 7.1: Sheep

7.1.2 Tourism infrastructure

These landscapes also host tourism infrastructure, the development of which is seen as another tangible placemaking tool. This section will discuss two tourism infrastructure projects in Orkney, their strategic relevance and community attitudes towards these.

While not explicitly noted in Table 4.1, tourism infrastructure encompasses a number of placemaking tools, suggested by Lew (2017), such as pavements, car parks and signage, as well as other physical elements. In this section, two most prominent tourism infrastructure projects in Orkney are discussed. Both of these projects aim to address challenges, such as inadequate visitor infrastructure and significant visitor impact, especially in the busiest sites, as well as maximise opportunities by improving visitor experience.

7.1.2.1 Orkney World Heritage Site Gateway Programme

Orkney World Heritage Site Gateway Programme, known as Orkney Gateway, is a development programme for the Heart of Neolithic Orkney World Heritage Site, funded by the Scottish and UK Governments as a part of the Islands Growth Deal (Islands Growth Deal 2021; Orkney Islands Council 2021a). The aim of this programme is to develop visitor infrastructure in and around three of the main sites in Stennes: Maeshowe, Stones of Stennes and Ring of Brodgar, emphasising the need to improve pedestrian and cycling infrastructure, parking and toilet facilities, information and interpretation and visitor management elements (Orkney Islands Council 2021a).

It is planned that the improvements will enhance the visitor experience, help to protect valuable historic assets and the environment, and reduce the current strain on existing infrastructure, such as narrow roads and small carparks. Figure 7.6 illustrates the gaps in provision, as depicted in the project documents, based on Active Travel Plan (ATP) consultation, aimed at identifying “key barriers and gaps in provision for local community access to the various areas of WHS” (Orkney Islands Council 2021d).



Figure 7.6: Orkney Gateway Project – gaps in provision (Orkney Islands Council 2021d p.2)

Figure 7.7 below demonstrates the narrow road without a footpath or pavement, at the crossing from the carpark to the Ring of Brodgar site (left) and a busy small carpark at Stones of Stennes.



Figure 7.7: Ring of Brodgar crossing (left); Stones of Stennes carpark (right), June 2022 (author)

The Orkney Gateway project was subject to a series of public consultation events in 2021, including a survey and two in-person sessions, where the opinions of

Orkney community members were sought on four options, proposed for this development. While the official consultation report was not yet available at the time of this study, some participants referred to it in their discussions regarding visitor management plans and infrastructure developments. Most notably, one participant expressed a critique of the proposal to open a WHS visitor centre with a café and souvenir shop, run by HES, referring to the changes in HES business approach to more income-centred:

“You know, and they, as a consequence [of the new business approach], and all they really want is the biggest possible shop selling the most possible tat, which they can buy at the cheapest possible rates” (MI-23)

According to the participant, this may threaten the locally run businesses, whereby the large visitor centre will be prioritised in the itineraries over the smaller local shops in Kirkwall and elsewhere. Additional critique was found on social media, in comments on Orkney Islands Council consultation invitations. One member of the Orkney community remarked:

“I went today to the 3 hours of exhibition which is all that the originators of this bizarre project have deigned to grant the people of Kirkwall. A horrific mishmash of misinformation and exaggeration was on display.” (public comment on OIC Updates 2021).

The comment was supported by several other respondents, albeit not in such a categorical way. This links back to the discussion in 6.5.1.3, whereby individual power is fostered by platforms, such as Facebook, where opinions can be voiced, despite the opportunity for a formal public consultation. This example, however, shows that even developments that are aimed at the local communities, not only visitors, propose seemingly useful elements, such as walking and cycling paths around busy spaces, and involve public consultation, still find an amount of resentment, voiced publicly. From other comments, it can be learnt that there is a disagreement with the physical infrastructure, such as footpaths and toilets, concerns over environmental damage and unsuitability for the shorter staying visitors, who might not have time to use the footpaths (public comments on OIC Updates 2021). Overall, however, another comment highlights that these concerns stem from the same issue, discussed throughout this chapter – development vs sense of place:

“One of Orkney's main attractions is that it is different, let's keep it that way or risk losing the reason people come to spend time here.” (public comment on OIC Updates 2021)

In the current absence of the published outcomes of these consultation events, and the final development plan, it is impossible to say if any of these concerns have been considered, and what proportion of consultation respondents constituted the more negative attitudes towards the proposals.

7.1.2.2 Strategic Tourism Infrastructure Development Plan (STIDP)

Another project, developed by Orkney Islands Council, and funded by VisitScotland through their Rural Tourism Infrastructure Fund (RTIF) is the Strategic Tourism Infrastructure Development Plan, or STIDP (Orkney Islands Council 2021c). This plan is one of the twenty-four STIDPs across Scotland, supported by this fund (VisitScotland 2023). The plan includes three stages, Asset Inventory, Interpretation Framework and the Strategic Tourism Development Infrastructure Plan, however at the time of writing only the first stage has been completed (Orkney Islands Council 2021f), with the other two being delayed, due to the need for the Strategic Environmental Assessment (SEA) procedure to be implemented (MI-20; Orkney Islands Council 2022).

The STIDP, through its first stage – the asset audit, is aimed at identifying key strategic infrastructure projects, which are then submitted to VisitScotland and funds are then allocated through the RTIF scheme for their implementation. The process was led by an external consultant and seven strategic infrastructure projects have been identified (MI-04). The final list is not publicly available, but these will include toilet facilities, campsites and other tourism infrastructure, to ensure tourism is developed sustainably (MI-04).

Throughout the interviews, many participants mentioned this plan, as a key strategic document in the tourism context, in addition to Orkney Tourism Strategy, and it is the relationship between both documents that was highlighted as an impeding attribute for the Strategy implementation. This is because both documents – the STIDP and the Action Plan for the Strategy implementation were developed at the same time, yet driven by different organisations and funds, thus differ in remit and timescale. Despite these differences, the scope of

both documents overlaps in the infrastructure context, creating difficulty in realisation. The overlap in the scope for both strategic documents led to the question of why both cannot be joined and implemented together and why the delay in STIDP approval has caused a delay in the Strategy Action Plan release. In conversation with the participant from the Council, however, the reason for this became clear, since “it's not adopted by the council yet” (MI-20).

“So if, for example, a strand of that strategic investment [STIDP] be to, and that's just an example is not in there, to develop a visitor centre in a particular area, that we've not got funding, we've not got a commitment for that yet. So we couldn't articulate that in the plan [Strategy Action Plan] at this stage. But if we did, it would need, it'd probably need a strategic environment assessment. So it's quite convoluted.” (MI-20)

As was introduced in 1.2.6, the improvement of infrastructure is one of the Strategy's objectives, therefore its realisation will inevitably include infrastructure-related actions. This means that any of these actions, identified in the Action Plan to implement the Orkney Tourism Strategy, cannot be approved by the council until STIDP passes the Strategic Environmental Assessment (SEA), delaying the release of the Action Plan. Such circumstances add to the critique of the strategy and mistrust in its implementation (Chapter 9).

Power-driven decision-making is at the centre of another concern regarding the STIDP, manifested in centralisation. As discussed in 6.5.1.2, geographical and organisational power in Orkney is concentrated in the Mainland, leading to disparity in investment and development between the main island and other isles of the archipelago. Indeed, in the case of STIDP, which drives investment of funds into tourism infrastructure, the participants referred to the fact that all the projects in the plan are situated in key sites in the Mainland:

“In the end, that was supposed to have been an inclusive strategic plan for the entirety of Orkney. And then it failed to address the isles almost completely into its final draft.” (MI-25)

Another participant, from the north isles, remarked:

“[...] there was no reason why not to invest or have in the first round of this project and the using this funding to have had a bit of a space to think about the infrastructure for all of the islands because we also have campervans

coming, we also need those waste disposal. We also have heavy footfall on sensitive areas, sensitive sites. So it was I think we were disappointed that that wasn't addressed." (MI-10)

These issues, described by the participant, were experienced by the researcher during the field trips. Most notably these include access track to RSPB Noup Head, where there is no signage to caution drivers on track conditions, suitable only for 4x4 vehicles (also conversation with MI-13b, 7.2.1). In her notes, the researcher wrote:

"I used Google to navigate and it took me to a rough track up the hill, where I couldn't turn back all the way up to Noup Head parking. It was very difficult to drive and very slow, but I saw a few small cars going up and down, so I thought mine can do it too, since I had no choice but continue." (Fieldnotes, July 2021)

The need for better infrastructure was also observed at Start Point Lighthouse in Sanday, where the nearest carpark has only two spaces on a sandy patch of the beach at the end of a single-track road. Moreover, Figure 7.8 illustrates the access to Links of Noltland – a significant Neolithic archaeological site in Westray.



Figure 7.8: Access to Links of Noltland, Westray. July 2021 (author)

Such a centralised approach to placemaking and power dynamics between the islands of the archipelago (also noted by Baldacchino 2015b; Butler 2015b), shapes the sustainability needs of Orkney as a tourism destination.

7.1.3 Festivals and special events

Further on Lew's (2017) tangibility scale are events and festivals, incorporating both the physical environment, and social and cultural characteristics of the place in mixed placemaking activities. This is because rural landscapes provide an opportunity for local communities to co-create activities and events in these landscapes, diversifying the place image from the homogeneous traditional image of idyllic countryside (Aquilino, Harris and Wise 2021). In Orkney, festivals are seen as a tool to showcase local culture to the outside world, as well as bring together locals and visitors in celebration of island life (Orkney.com 2023b, 2023c). The most prominent events are the St Magnus International Festival, Orkney Folk Festival, Orkney Storytelling Festival and North Ronaldsay Sheep Festival, as well as Orkney Nature Festival and others (Orkney.com 2023c).



Figure 7.9: Orkney Folk Festival (Orkney.com 2023c)

While many of the events within those festivals take place in the spaces, created by planned placemaking (such as streets and venues), all are organised by third-sector organisations and community groups (see Orkney Storytelling Festival

2021; St Magnus International Festival 2023), supported by Orkney Islands Council and other funding organisations, as well as donations and paid activities. The events within these festivals showcase local culture, traditions, crafts, food and drink, science and arts. Many involve local communities and schools, and offer activities, embedded in local nature and culture, including walks, family days out, workshops, concerts and talks. The festivals and cultural events are aimed at attracting local as well as non-Orkney audiences, often reaching out internationally to those who are interested in Orkney (Orkney.com 2023c). From the responses that mentioned festivals, it can be learnt that these are viewed positively by locals:

“And then I booked up this year [onto Orkney Folk Festival] and I was just blown away, it was so good.” (MI-27)

It is clear from the reflections of the participants, as well as from reviewing the content of festival pages, both on Orkney.com and the festivals’ dedicated websites, that there is a high degree of alignment with the sense of place attributes (6.7). The festivals embody the uniqueness of Orkney, its special attributes that make it distinct from other places. They promote local culture, heritage and environment, and showcase a local character, while also bringing international attention and economic benefits from the local tourism and visitors outwith Orkney.

“It's also been really good to see the response to the festivals that have been held so far. And although there are obviously lots of local people who attend these, having tourism, visiting performers, it really bolsters these types of events and it promotes Orkney I think in a really good light, sends out good messages and makes them financially viable as well. I think local people have been very excited this year about these things, like the folk festival. [...] People absolutely loved it. So it's really, and performers coming from all over the world, which is fantastic.” (MI-29)

By applying collective community efforts to co-create the events, they can strengthen their sense of place and belonging (Jaeger and Mykletun 2013). Moreover, while most of the activities concentrate around Kirkwall and Stromness, many take place outside the Mainland and reach the islands of the archipelago, such as North Ronaldsay, Westray and Hoy.

“So they've really branched out from something I suppose maybe ten years ago it was very Stromness-centric, but now it's in a lot of the smaller community halls and North Isles and there's usually events in Hoy and so on.” (MI-29)

This encourages the dispersal of visitors and demonstrates less-known areas of Orkney (Jaeger and Mykletun 2013), and therefore distribute the benefits from these events and the overall visitor economy more equitably around the archipelago.

However, two respondents also mentioned some difficulties regarding festivals, affecting the infrastructure, mainly the accommodation offer around Kirkwall during the St Magnus festival in June (Figure 7.10).

“[...] certainly for the likes of when we have St Magnus Festival, it's very difficult to get accommodation anywhere close to Kirkwall.” (MI-08)

“Now we've got St Magnus festival back on again in June, for example. At that particular time, you absolutely cannot get anywhere at all.” (MI-15)



Figure 7.10: St Magnus Festival banners near St Magnus Cathedral, Kirkwall. June 2022 (author)

Yet, while noting these issues, the participants portrayed it as a part of the “big success story” (MI-15) Orkney tourism has been. As Gamble (2021) argues, involving community members in events organisation can ensure the events

embed the values of local communities, as well as encourage volunteering – both, in the author’s view, contribute to the economic success of rural areas. Walker (2019) adds that community-based festivals can make remote rural and island communities more resilient and promote a sustainability agenda.

7.1.4 Shopping

Another example of mixed placemaking is evident around the streets of Kirkwall and Stromness, where the majority of retail activities take place in Orkney, performed by both locals and visitors, in an organic and planned manner. Shopping is another tool, that is employed by Orkney placemakers to enhance the attractiveness of Orkney to visitors and other actors, which can contribute to Orkney’s economic growth. On Orkney.com, the theme ‘shopping’ is featured in the ‘Things to Do’ section, emphasising the uniqueness of this experience (Orkney.com 2023f).

Tourism plays a major role in this type of placemaking, whereby many shops intentionally exist to attract visitors to buy their products. Noteworthy are the jewellery products, that are seen among the most attractive to cruise visitors in Orkney and elsewhere (see Brida et al. 2012), due to the size and symbolic value of the items for visitors, while bringing relatively high benefits to the businesses.

“[...] our town centres, mainly Kirkwall of course, benefit hugely from the summer trade and the jewellery trade, in particular. The creative industries have identified a significant uplift because of cruise, you know, small items that can be bought, taken away, you know.” (MI-20)

In addition to visitor-orientated shops, locals participate in retail as well. Kirkwall High Street is seen as one of the attributes of the sense of place in Orkney, as will be discussed in 8.2.2.2. Although many of the shops are targeting the visitor market, residents are actively encouraged to support local businesses, through initiatives such as Kirkwall Gift Card and Love Local competitions, organised by Kirkwall Business Improvement District (BID) (Kirkwall BID 2023).

More so during the COVID-19 restrictions in 2020-2021, when the visitor market was very low, local shopping was encouraged using initiatives such as prize draws and free parking for the first hour. Figure 7.11 below illustrates signage

on shop windows, as observed by the researcher during her 2021 field trip. Free one-hour parking was also offered in the Summer of 2021 to support local businesses during the pandemic, and is still in force at the time of writing²⁷ from October to April (Orkney Islands Council 2023a). This support, however, was not easily obtained, echoing the critique brought by some authors (see Bramwell and Lane 2011; Higgins-Desbiolles 2011; Ruhanen 2013; Maxim 2016). According to local media, the community and businesses had to negotiate with OIC against the increase in parking charges during a difficult time for businesses (The Orcadian 2021; The Orkney News 2021a).

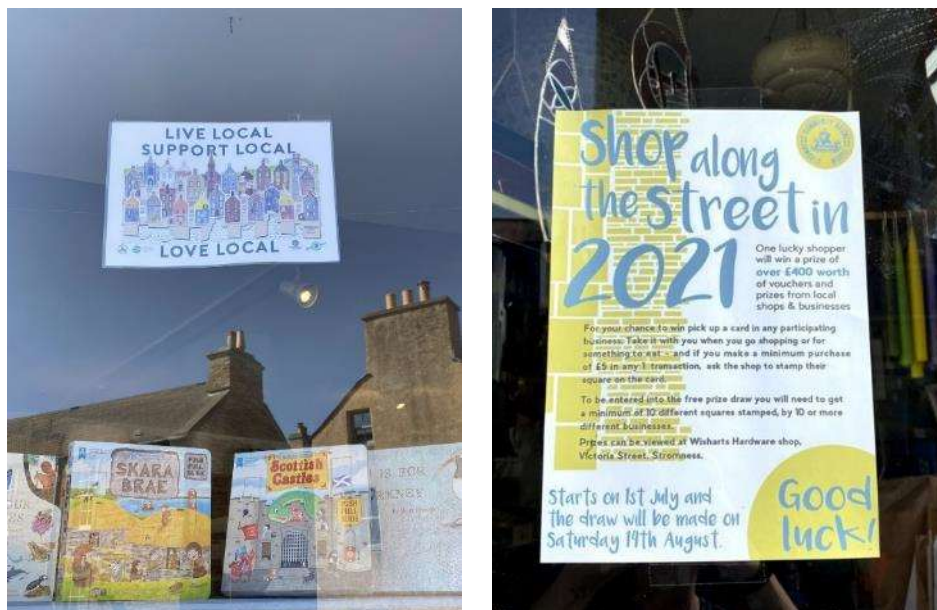


Figure 7.11: Support local shop window signs, Stromness. July 2021 (author)

Another interesting feature observed during both field trips, was the signage displayed on council-run premises, such as St Magnus Café and Community Centre in Kirkwall and Point of Ness campsite in Stromness, that emphasise welcoming locals (see Figure 7.12).

²⁷ Autumn 2023



Figure 7.12: Locals and visitors welcome sign, Kirkwall. July 2021 (author)

Such undertakings by the local authority in Orkney, especially during the COVID-19 pandemic, can be seen as supporting local businesses in the absence of visitors and increase in online shopping (Nanda, Xu and Zhang 2021). However, shopping locally is not only an economic catalyst, but can encourage civic engagement within the community, strengthening the sense of place (Wilson and Hodges 2022). Since local high-street and availability of locally owned shops are seen as contributors to residents' sense of place, it will inevitably be affected by the presence of visitors in these areas as well (8.2.2.2).

7.2 Place branding and representation

As discussed in 4.2.1, place brand is a unique identifiable character of a place, representing its personality and its identity outwards and internally to its residents and users (Kaefer 2021). Place branding, consequently, is a tool, used to visualise this place brand, establish their vision for the future, and attract talent and capital to realise this identity and its ambitions, while also contributing to the global community and the planet (Kaefer 2021). More so in rural areas, where place branding is often used to attract new people to live, work, send children to schools and generally sustain small, often remote, communities (Gulisova, Horbel and Noe 2021). Lind and Lindström (2023) and Jamrozny and Walsh (2008) also note that place branding is different from

destination branding, since it applies holistically to all sectors and activities, such as living, working, investing and visiting the place.

7.2.1 Orkney brand

As learnt from the conversations, the Orkney brand represents Orkney as a whole, rather than specific sectors discretely, to align the values across all industries in Orkney (MI-05). To meet this objective, Orkney.com was created, as a main digital gateway to Orkney, promoting and providing information for those who consider visiting, living, working and studying in Orkney, and providing “a nice feel about Orkney” (MI-05). The website aims to promote “local quality products and services throughout the UK and beyond” and attract people to live and work in the islands by “enhancing the sustainability of our communities” and “promoting Orkney’s way of life and opportunities” (Orkney.com 2023a). The brand is supported by the Orkney logo (Figure 7.13) in all its communication channels, including Instagram and Facebook accounts.



Figure 7.13: Orkney.com logos (Orkney.com 2023e)

Such an overarching approach to place branding and marketing is seen as a positive endeavour by many participants, who mentioned Orkney.com in their interviews, especially since the website incorporated the tourism content from Visit Orkney website in 2018 (Orkney.com 2023a). The main strength of such a resource is being a one-stop shop for all relevant information about Orkney. In the words of one interviewee:

“It's really why everything started to come underneath the Orkney.com banner, that it was really quite complicated before. Like where do you go for your information? Do you go to Visit Orkney, VisitScotland? Orkney tourism marketing group? You know, there was like different brochures coming out for essentially the same thing. So I think that I think that's improved.” (MI-19)

Despite a holistic approach being taken to brand Orkney as a place, rather than a destination (Lind and Lindström 2023), the Orkney Tourism Strategy maintains that “[d]estination marketing will be based on a strong, universally-used brand”, which incorporates distinctive culture, heritage, creativity, food and drink and nature (Destination Orkney Partnership 2022a p.13). It implies, therefore, that marketing, as communication campaigns aimed at specific audiences (Kaefer 2021), is sector-specific, albeit based on the overall Orkney brand. The concept of universally used brand, however, is not agreeable with everyone in Orkney:

“[...] everything I look at it just reading this again, you know, ‘Destination marketing will be based on the strong universally used brand’, I don't even believe it, don't even agree with that, I'm afraid, you know. The niches of the, niches of products that we have here shouldn't, you know, shouldn't necessarily be, shouldn't necessarily be branded in the same way, you know.”
(MI-25)

This emphasises the need to present the diversity in Orkney place branding, which includes not only diverse communities, diverse people, diverse products and attributes of Orkney, but the diversity of its landscapes and islands overall. From reviewing the main branding and marketing channels online, it was found that while most of the content is indeed the Mainland-related, outer isles do feature on the social media channels, especially Instagram (Figure 7.14).

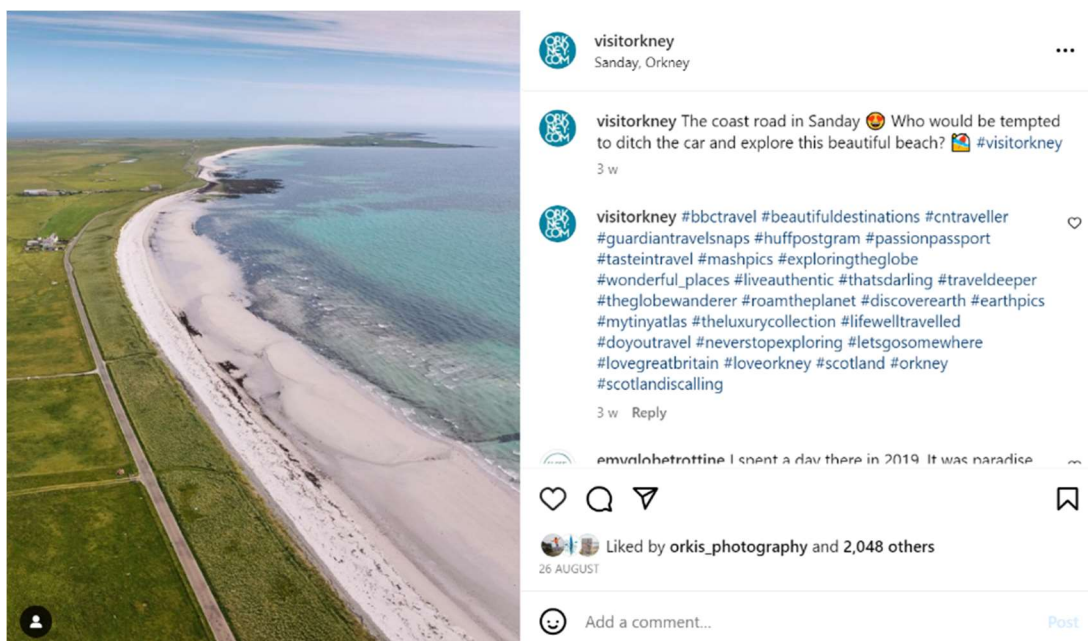


Figure 7.14: Post featuring Sanday by @visitorkney (VisitOrkney 2023b)

However, when discussing the Strategy with the participants from Westray, they reflected on a centralised approach to the document and Orkney marketing in general.

“We did feel that the document that you sent us to read was very Mainland Orkney driven. Absolutely beautiful pictures in it, but none at all from any islands, from the North Isles.” (MI-13a)

On the other hand, as noted by the Westray participants, even when the imagery from the islands *is* used in marketing materials, it often does not reflect the situation on the ground, creating dissonance between visitor expectations and reality. Giving an example of the rough track towards Noup Head lighthouse (7.1.2.2) – one of the most notable and popular sites to visit in Westray, the participant said:

“[...] you go up place Noup Head, which is used in tourism, is one of the main pictures used, if Westray is ever taken into some of the advertising. Only problem is unless, really, you've got a four-by-four vehicle, or that you're really good, fit to walk or go on a bicycle, then it's really out of bounds.” (MI-13b)

This situation confirms the overall sentiment of those residing on the outer isles, regarding the dissonance between the Mainland and the outer isles of the archipelago, discussed elsewhere in this thesis. Marketing is added to the array of themes, where this dissonance is felt. From the branding perspective, however, many in decision-making positions display understanding and need for more emphasis to address the dispersal and benefits distribution issues. As heard from the OIC representative:

“I can probably say this from a council perspective is, will be to encourage coherent marketing of the offer on the outer islands, first of all, to make, you know, the visitor aware that there is in fact things to go and see and do.” (MI-20)

As explained by Baldacchino and Ferreira (2013), some archipelagos encourage visitors to explore the different islands, differentiating the product to appeal to the different interests and financial abilities of visitors. This in turn increases visitor numbers, and length of stay and supports benefits distribution, by focusing on “management of diversity, and on how this condition can be

expected to expand the impact, flavour and appeal of a particular tourist destination” (Baldacchino and Ferreira 2013 p.85).

Branding Orkney as an archipelago and raising awareness that there are seventy islands was also discussed during a number of interviews. MI-01 argued that using ‘Orkney Islands’ rather than ‘Orkney’ in branding and marketing, in the tourism context, will increase awareness of the outer isles and encourage the dispersal of visitors and benefits from the Mainland. MI-04 and MI-06²⁸, on the other hand, stressed that they live in ‘Orkney’, not ‘Orkney Islands’²⁹, and it is less about the name and more about “consistent marketing” of Orkney as an archipelago. Indeed, during the discussions, it was observed that regardless of their place of residence in the archipelago, participants spoke mainly about ‘Orkney’ as a unified entity. As Anderson (2024) writes, referring to Orkney in singular form might be an attempt to align with neighbouring Shetland, “for whom their home has always been neither an island, nor an archipelago, but a land”.

“Yes. So I think that's quite common because most people would just describe it as Orkney I suppose. So when I say the island, I mean the islands.” (MI-29)

The use of a universal brand is seen in other archipelagos as well. In the Faroe Islands, for example, the universal brand (Figure 7.15), albeit addressed mainly to visitors, is established and used in all their marketing channels.

²⁸ Participants, referred to in this paragraph, did not consent to direct quoting.

²⁹ Term ‘Orkneys’ or ‘The Orkneys’ is sometimes used by people outside Orkney, which usually triggers very negative attitudes by Orkney residents, as explained by Anderson (2024).



Figure 7.15: Faroe Islands brand (Visit Faroe Islands 2023c)

“With the words "Unspoiled, Unexplored, Unbelievable" and an "un" prefix in key words in the descriptions, it is emphasized that the Faroe Islands are something you have not experienced before. This sets the destination apart from the "bigger and better" destinations. The Faroe Islands are unique in themselves and different from all others.” (Visit Faroe Islands 2023c)

Most interestingly, the brand is defined and explained in the Faroese tourism strategy implementation report, publicly available, emphasizing that it can be used by everyone in the industry, including encouraging every Faroese to use the brand in any of their networks, events and activities (Visit Faroe Islands 2023c). Such open and accessible brand information was not found in Orkney, arguably missing an opportunity to increase the sense of belonging and collective ownership of the community (Aitken and Campelo 2011), and strengthen their sense of place. After all, as Aitken and Campelo (2011 p.917) argue, a place brand “belongs to the place and its people”. Place brand can be used to unite people and strengthen internal place identity (Aitken and Campelo 2011; Kaefer 2021). Moreover, understanding and putting the sense of place at

the centre of place branding can help determine people's expectations towards the place, and therefore their attitudes towards placemaking (Lecompte et al. 2017), including tourism development.

7.2.2 High-end brand

One of the noteworthy elements of the Orkney brand is its food and drink offer, which can be seen as mixed placemaking (Lew 2017), and relating to the branding of Orkney as a high-end food and drink producer. This representation emphasises the local origin of the produce, whether it is locally sourced or crafted, as well as its connection to the Orkney heritage. Such representation resonated with some participants, who proudly discussed Orkney food and drink as an attribute of its uniqueness, linking to the local industries that supply the produce.

"We also have extremely good food and drink, which attracts a lot of people, so they tend to be happy with that." (MI-22)

"And so we have some of the best in Scotland and the UK fishing and farming, and so the produce we produce, I think that's a big thing when people come here and try and just trying, and they go home, and the first thing to talk about is the quality of what they eat here." (MI-24)

Some participants discussed Orkney food and drink offer and its role in bringing more (financial) value from tourism by creating high-end products to appeal to high-end visitors, as well as exporting outside Orkney. One participant, discussing food insecurity and fuel poverty among many Orkney communities, referring to the opportunity for Orkney businesses to export their high-end products:

"But it's kind of tends to be micro-businesses, and also the food export. And I know it's luxury food that again, most people here can't afford." (MI-14)

This highlights the opportunity for Orkney communities to reap higher benefits from export industries, including tourism, to sustain themselves. This is echoed by another participant, who acknowledged the need for high-end produce to sustain Orkney communities:

"I think then you really need to work on the added value of your product. So whether that's turning Orkney meat into sausages, for example, you need to

hit that higher, that higher selling point. So the best way to make money is the deluxe option. So I think that's an element of really, really high-quality food. We should aim for that high quality stuff because it's the sensible thing to do, and that's what I'm sort of thinking a little bit in the high-end section.” (MI-10)

This emphasis on ‘quality over quantity’ has been adopted in Orkney at least since the beginning of the 21st century, when a decline in the agriculture industry led to the need to market the now smaller-scale produce as high-end, to stay profitable (Lange 2006). This, however, creates some challenges. As one interviewee explained:

“And that [high-end branding] has a massive impact on Orkney, because when really really wealthy people come here, and then the prices of accommodation [rise] because they rarely think about how much they're paying the prices, and then they, yeah, they may think about moving here, and having a second home here and the impact then we talked about the social socioeconomic impact on people is massive.” (MI-14)

Moreover, the desired luxury offer can be detrimental to tourism accessibility, preventing visitors of certain demographics from spending more time in Orkney or visiting the destination in the first place. As one participant remarked regarding the overall perceived affordability of visiting Orkney:

“But one of the challenges, I think one of the key challenges, the affordability as well and that I think you could probably get a lot more people wanting to come and experience the place.” (MI-26)

However, despite the numerous mentions of Orkney food and drink as a unique offer for visitors, a somewhat contradictory picture was observed by the researcher during her fieldtrips. Many places, especially on the islands outside the Mainland, were lacking dining offer. It was especially evident in areas less busy with visitors, such as Sanday or Rousay. In general, it was difficult to find a reliably open café or restaurant outside Kirkwall. The researcher reflected on this as follows:

“Such shortage of open food places was noticed throughout Orkney, perhaps less in Kirkwall, but still much different from cities and towns on Scotland mainland. Opening hours vary throughout the day, with some places

randomly closing or opening at different times. On the one hand this demonstrated this laid-back attitude to many things, so prominent in island communities. [...] On the other hand, albeit connected, these changes are a necessity due to the fact that most of the businesses are ran by owners and families, and there is a tremendous staff shortage throughout Orkney, so keeping business open is sometimes impossible, especially with COVID still around and people get sick all the time.” (Fieldnotes, June 2022)

It was also noted that the food offer in most of the places, visited by the researcher (with the exception of Pierowall Hotel in Westray, which served reasonably priced food from locally supplied fish and dairy) did not feature local produce, despite promises of marketing images, and throughout the interviews. Instead, most of the places offered the traditional menu, not different from elsewhere in Scotland, and local shops, especially out on the islands, were stocked up with mainly Co-op products, with very little local produce. This again is linked to its affordability for local people, and the need to price higher, since the costs to produce food are high, not least due to the small scale and island location (Grydehøj 2011), as well as lack of sufficient local facilities, such as an abattoir (MI-28). This situation adds an interesting angle to the discussion on sense of place and place branding, where despite that many acknowledge that high-end products are not affordable for the locals, high-end branding does not always detract from the sense of place. This might be because the luxury offer of local produce, with its “scarcity, extra value, and high quality” (Mortelmans 2005 p.505), is perceived as a sign of the uniqueness of Orkney, which was observed to be one of the attributes of sense of place (6.7).

The difference between this high-end Orkney brand, as represented outwards to its consumers, and a more complex reality has the potential to create several issues. Firstly, it may create dissonance between Orkney, represented to visitors and potential new residents, and Orkney as experienced by some members of the community, who might not be able to relate to the Orkney *made* by these placemaking activities. However, as noted at the beginning of this section, branding Orkney as a high-end place outward is often a necessity, to attract higher-paying brand consumers, to compensate for the low volume of production and desirable lower volume of visitors, pursuing ‘quality over quantity’ and ‘value over volume’. Secondly, it may affect the visitor experience, if the

availability of unique local produce will not equate to the promotional content. In addition, this disparity can exacerbate the gap between the Mainland and the outer isles, where the food and drink offer is limited, compared to the more visited places, affecting visitor experience as well, leading to visitor dispersal issues and benefits distribution.

7.2.3 Green brand

Another noteworthy element of Orkney branding is the so-called 'green brand', often associated with Orkney. While this is not an official brand message, it was mentioned several times during interviews in relation to environmental sustainability, often manifested in renewable energy projects. These include the Sustainable Aviation Test Environment (SATE), the European Marine Energy Centre (EMEC) and multiple wind energy developments. All these contribute to Orkney brand, seen as "clean and green" (MI-05) and "green destination" (MI-01). Orkney Tourism Strategy uses the term "green destination" in its 2030 vision, stating:

"Using its world-leading renewable energy credentials, Orkney will increasingly be seen as a 'green' destination, prioritising low carbon initiatives and minimising negative environmental impacts." (Destination Orkney Partnership 2022a p.13).

However, the overall branding of Orkney as a 'green destination' is contradicted by the fact that many of its industries, including tourism, pose significant sustainability challenges, contesting the perceived 'green' image:

"On the face of it, you would see an island, a clean, green, fertile, not highly polluted, quite good reputation, and that should be easy to sell, but then if you dig a bit deeper, you start to see that there are big diesel burning ferries coming in and out here all the time with people and product and in both directions." (MI-18)

Interestingly, this was also noted by the participants, directly involved in Orkney marketing and branding. These participants reflected on the "tension" between the green brand and the inherently unsustainable nature of travel (MI-04), especially to the islands, "risking" values of the Orkney brand (MI-05). Explaining their concerns, these participants expressed less favourable views on

cruise tourism, since it contradicts the green brand, due to its environmental impact. Indeed, it was observed that the marketing material, available on a variety of channels managed by the Orkney.com team, does not target the cruise market (apart from business listings, that can offer services to cruise passengers, such as guided tours) and does not include cruise in marketing imagery. Most of the cruise-centred marketing is done by Orkney Harbours themselves, as seen in the example in Figure 7.16. Nevertheless, while promoting cruise and port facilities, cruise-related marketing content also attempts to align with the overall sentiment to reduce the number of large cruise ships and create more demand from smaller ships (Orkney Harbour Authority 2023c), bringing fewer visitors who are perceived to bring more value to the islands (James, Olsen and Karlsdóttir 2020).

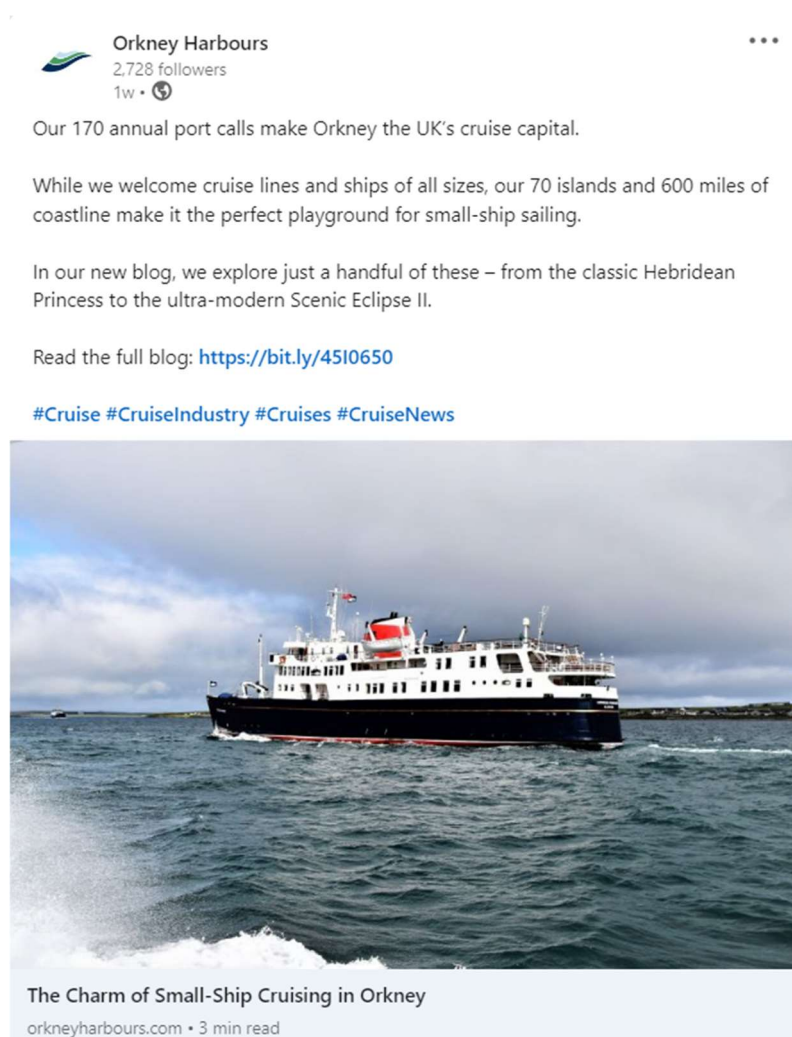


Figure 7.16: Cruise-related post on LinkedIn (Orkney Harbour Authority 2023d)

As mentioned in 4.2.1, place branding can be driven by political interest, whereby it conveys selected attributes of the place to advance the, often economic, agenda of the brand initiator (Lecompte et al. 2017). In the context of cruise tourism, one participant acknowledged the power of the Council:

“But maybe it would, you know, the harbours department [of the Council] obviously are making good money from cruise ship stopping, so, why would they want less? You know, if it's economic benefit is the main driver, then you know. And the money's good. Why, why stop it? Yeah, maybe a bit cynical, but...” (MI-19)

Another participant, residing in Westray, contended, reflecting on the lack of investment in tourism infrastructure in outer islands:

“But there are, there's money being poured into things that I would say, it's a bit glitzy. Lacks a little bit of substance, but it will have the buzzwords at the time. But as a result, there's some foundational stuff it's beginning to collapse.” (MI-13b)

To illustrate the element of power, as applicable to the significant power holder in Orkney – OIC, an example from the farming industry can be useful. As the participant, a local crofter specialising in sustainable farming opined that in the efforts to reach its economic and net-zero ambitions, the Council prioritises developments that contribute to the economy *and* has perceived environmental benefit (such as renewable energy). In contrast, developments that have less economic power, but are also important from a sustainability perspective, are discounted:

“Because [...] if you're going to be truly sustainable, we need our own abattoir. We need anaerobic digestion on every island. You know, we don't just need one. Yes, a big one at Hatston. But no, no, no, no. That's not sexy.” (MI-28)

Contributing to the contested brand of Orkney is also the dissonance between ‘green’ as an element of placemaking, and ‘green’ as a feature of Orkney landscape. As one participant reflected:

“I mean, it's green rolling hills, they have no trees, basically. I mean, that is a very fertile island, compared with lot of other islands here in Scotland. And

so I think that enhanced by [farming]. I mean Orkney is looking great. It's very green now, and it's looking very, very good right now." (MI-24)

On the other hand, a participant, reflecting on post-COVID-19 changes in sustainability awareness, connected the desire for lifestyle change, sustainability and industrialisation, showcasing how the "green credentials" (MI-01) of Orkney and the 'sustainability' narrative are used to attract people to Orkney:

"So I don't think it had the same jump start reaction it's had in other parts of the world is it could have. Because I think this community was already on its way. There was already large numbers of wind turbines that were up privately as well as commercially. EMEC obviously has an enormous base here and they're one of their main reasons for existing is that kind of thing. And a lot of folk, I think proportionally a higher percentage of folk that live here already live here because they want that different lifestyle." (MI-30)

Here, as well as in many Orkney branding materials, the meaning of 'sustainable' is equated to renewable energy developments, which is often manifested in placemaking elements, such as wind turbines, as indicators of sustainability. Consequently, from the above quote, it can be discerned that "wind turbines" is also an indicator of a "different lifestyle", contrasted to the one elsewhere, where they do not feature prominently in the landscape (such as in urban environment and more densely populated areas). However, branding message such as 'renewable energy', which is seen as one of the main drivers for a sustainable future (Peake 2018), are not always aligned with the sustainability definition, and sense of place, expressed by other participants (Chapter 6). As discussed in 7.1.1, the development of the renewable energy sector, prominent in Orkney's landscape, is criticised by some members of the Orkney community, driven by the lack of direct benefits and its effect on the sense of place for those, who attribute it more strongly to physical elements of Orkney. The 'renewable energy' message, therefore, can be seen as a top-down effort to align the Orkney brand to the needs of external stakeholders, such as Governments, investors and wider non-Orkney public, to drive people and capital to Orkney as a main agenda, as opposed to alignment to the needs of members of Orkney community. What this trajectory omits, however, is the wider meaning of 'sustainable', beyond the buzzword or a term that would appeal to those who can bring economic growth to the destination. The implications of such a

sustainability narrative can be deemed unsustainable from the community perspective, bringing issues, such as gentrification and impact on sense of place.

7.3 Conclusions

This chapter has introduced the most prominent elements of Orkney planned placemaking, relevant to the tourism industry and sustainability discussion. These include developments that take place in rural landscapes (thus affecting both the sense of place, as well as tourism product), such as industrial developments, tourism infrastructure, and mixed placemaking activities, for example, festivals and shopping scene. On the intangible end of Lew's (2017) scale, these elements include Orkney representation in branding and marketing activities. From the discussion in this chapter it can be seen that the contested character of Orkney is reflected in placemaking, revealing two interesting conclusions. Firstly, there is a dichotomy between how Orkney is represented in the placemaking and how Orkney is understood, or sensed, by some of its residents. Secondly, an element of power can be recognised in this dichotomy, to advance the desired placemaking agenda. This *place dichotomy*, fuelled by power dynamics between stakeholders, drives the residents' perceptions towards tourism to Orkney, and therefore their support for tourism strategy.

7.3.1 Place dichotomy

The dichotomy, or contested meaning, of Orkney as a place was already evident in Chapter 6, where different definitions of sustainability and different attributes of sense of place were recognised, driven by sociodemographic characteristics of Orkney residents and its rural cold-water archipelago context. The present chapter allowed for deepening this understanding of the contested nature, by reviewing placemaking narratives of Orkney and residents' perceptions of their value.

From the discussions, presented in this chapter, it was revealed that landscape plays an important role in defining the meaning of Orkney, where it constitutes the sense of place of some residents, by adding aesthetic value and creating the sense of freedom, quiet and 'green' (Chapter 6). This is contested by those who see landscape as an opportunity for another type of 'green' – manifested in renewable energy elements in the landscape, as tangible placemaking, often

dominated by wind turbines. This contested meaning of 'green', and therefore the meaning of 'sustainable', causes tensions between some groups of stakeholders, driving negative perceptions towards many forms of development that take place in the landscape.

These negative perceptions are further exacerbated by the unclear tangible benefits from these developments. It is understood that if the benefits from the development were clear, even if it impacts the sense of place, they would be perceived as more valuable, since perceived benefits have a stronger effect than perceived costs (Nunkoo and Ramkissoon 2011). Moreover, the term 'green' was *double contested* by reflecting on its relevance to the tourism industry. It was discussed that Orkney's perceived 'green brand' does not align with the environmentally impactful nature of travel, especially with the element of 'crossing', which is at the basis of island and archipelago tourism (2.3.2).

The dichotomy between Orkney as a place sensed by its residents and represented in mixed and intangible placemaking was also evident, albeit not to the same extent as in tangible placemaking. Here, two main issues were raised. Firstly, the use of iconic imagery in Orkney place branding and marketing was seen as an element of centralised placemaking, increasing the disparity between the Mainland and outer isles of Orkney. It was contested by those, whose perception of Orkney stretches beyond the "totemic sites" (MI-09), especially among those who reside on outer isles. Secondly, the branding of Orkney, emphasising its high-end products, can increase the gentrification of Orkney, leading to issues such as high housing costs, population disparity and demographic decline (Shucksmith and Rønningen 2011). This is seen as another component of romanticising the islands, referred to by some participants, further expanding the disparity between different communities in Orkney.

Of course, and in line with Farrell and Carr (2022), the difference between sense of place and place representation in a variety of placemaking activities in Orkney is not equally perceived among communities and other stakeholders. While such dichotomy can be identified by some members of the community, who feel that Orkney branding and other consumer-facing activities do not accurately represent Orkney as they see and feel it, others see alignment between how Orkney is represented and how they experience it. This can be seen as merging

of “for-self” identity with identity “for-others” (Lange 2006 p.149), whereby the line between the place sensed and the place represented becomes blurred. Since Lange’s study, which concentrated solely on history and heritage, the situation has arguably become even more complex. Now, new elements are introduced to the ‘for-others’ identity, such as ‘green’ renewable energy developments, and ‘high-end’ products, made and marketed to attract wealthy visitors and new residents.

7.3.2 Power

As argued by Lecompte et al. (2017) in the place branding context, place representation is often driven by specific needs, identified and promoted by more powerful stakeholders, which can be contested by other stakeholders, if it does not align with their needs (Klijn, Eshuis and Braun 2012). The very essence of power, therefore, is linked to place, reflected in often competing goals, needs and claims for its use (Codina, Lugosi and Bowen 2022). Those with power can underpin the strategic planning with their ideology, in which case the strategy will be more profoundly aligned with their needs and interests (Tribe and Paddison 2023).

Codina, Lugosi and Bowen (2022) argue that the assertion of power is driven by social, economic and political motivations of stakeholders, reflected in their perception of potential benefits and costs, associated with the place. This assertion of power is often manifested by “‘hegemonic’ representational practices” (Codina, Lugosi and Bowen 2022 p.882), some of which can be evident in Orkney as well, as discussed in this chapter. According to Lew (2017 p.452), top-down planned placemaking activities “reflect the norms of social and political structures beyond the indigenous and local community”. In this light, the values, assigned by those with power and agency to plan and implement these placemaking elements in their tangible, mixed and intangible forms, are often more prominent.

In the tangible placemaking, two main points of contention here were recognised. Firstly, the centralised approach to tourism infrastructure development was discussed, which exacerbates the disparity between the islands and their communities. This not only creates tangible economic and

demographic challenges but also contests the attribute of cohesiveness (Figure 6.9), where Orkney is seen as a single entity ('land', 7.2.1), rather than a collection of islands with disparate communities. Secondly, the pursuit of the economic benefit of placemaking activities, despite their effect on the sense of place of some residents, was identified in the discussions. This was also manifested in the renewable energy development, as well as the development of other sectors, such as cruise tourism (Chapter 8).

The element of power was also noted in the apparent pursuit of economic benefits on the account, as some argued, of social and environmental sustainability, in the mixed and intangible placemaking activities. This was evident in the 'quality over quantity' or 'value over volume' approach to place branding (7.2.2), which stands in striking contrast to the ever-growing cruise tourism industry, as will be discussed in the next chapter. In addition, some participants reflected on the threat such branding might impose on the social sustainability of the Orkney community. This threat may manifest in gentrification and the issues that come with it, as noted above.

Ap (1992) identifies power as a key variable in the exchange between hosts and visitors, according to the social exchange theory, whereby an actor with lower power may feel disadvantaged in the exchange relationships. From this chapter, however, it can be understood that in Orkney's case, the power manifests not so much between locals and visitors, but between locals and those in charge of placemaking, which then affects the exchange between the locals and the visitors, as discussed in the following chapter. This can be regarded as a *three-actor exchange*, whereby power dynamics between two actors (community and 'placemakers') affect the exchange between them and the third actor (visitors). Figure 7.17 illustrates this understanding.

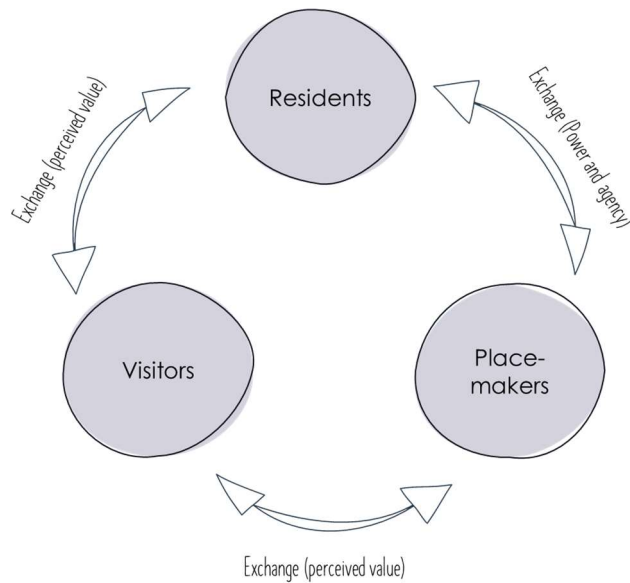


Figure 7.17: Three-actor exchange (author)

According to Ap's (1992) formation of exchange relations, power means possession of resources, that the other actor needs, forming dependency relations between them. In this situation, the power to decide the course of development of tourism lies with those who have the agency (capability) to plan and deliver the development (4.2). Application of this power, therefore, determines whose needs this development is set to satisfy and whose *value* it is designed to increase, and how the benefits of this activity are distributed. This follows Lew's (2017) argument, that power dynamics between actors can be understood by how placemaking is manifested. As Fincher, Parry and Shaw (2016 p.521) say: "Place-making is a contest over whose vision dominates, who has the resources to influence and who speaks, finances, designs and implements". Therefore, power dynamics between the community and placemakers influence the exchange between them, via the third party (visitors), whereby satisfaction from this exchange is manifested in the attitudes of the community towards visitors. Therefore, the next chapter will discuss the relationship between Orkney residents and visitors, exhibited in their perception of the benefits and impacts of tourism to the islands.

CHAPTER 8

Tourism Value

So far, two key elements of this study have been discussed. The first element is the sense of place of Orkney residents, reflected in the diversity of sustainability needs and opinions on what Orkney is and what it should be (Chapter 6). The second element is to what extent the formal representation of Orkney as its placemaking processes is aligned with the said sense of place (Chapter 7). From these discussions it was concluded that the alignment is far from absolute and that three factors affect it: (a) attributes of Orkney that construct the sense of place, underpinning the (b) perception of benefits and impacts of the placemaking by residents (their value, as per 4.3.2), shaped by (c) power to decide on placemaking goals and benefits distribution. This is illustrated in Figure 8.1.

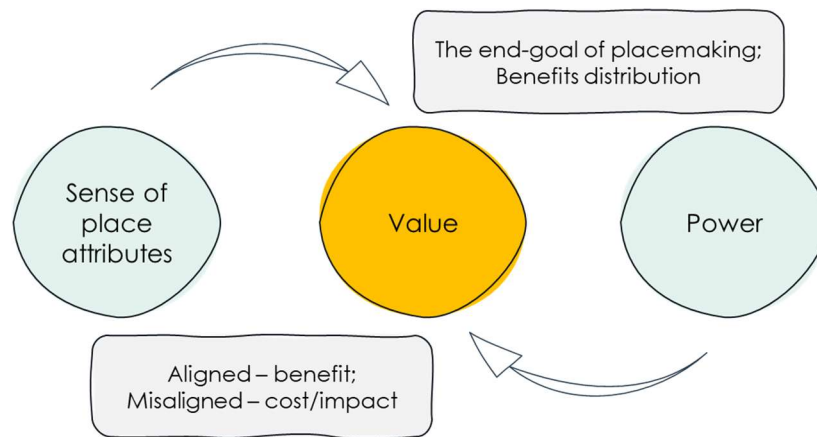


Figure 8.1: Alignment factors between the sense of place and placemaking (author)

It was also concluded that value (b) and power (c) underpin the three-actor exchange between placemakers, residents and visitors (Figure 7.17). In this exchange, residents' perception of visitors' value is driven by the need for sense of place (a) alignment. On the other hand, placemakers' perception of value, is driven mainly by economic goals, which are not always aligned with residents' needs, especially when the resulting benefits are not clearly evident (7.3.2). However, the placemakers are able to advance their needs and values more prominently by exercising their power, thus reinforcing the negative attitudes of some members of the Orkney community. These negative attitudes, in turn, contribute to the lack of support for tourism development and mistrust in the Strategy, as another manifestation of the top-down placemaking.

While in Chapter 7, the exchange between residents and placemakers was at the centre of the discussion, this chapter aims to deepen the understanding of the exchange between Orkney residents and visitors, and residents' perception of the value of visitors to Orkney. The findings of this section are based on the relevant input from the participants about visitors and benefits from tourism (thus, from visitors), as well as some available statistics for context. Moreover, it includes relevant information from observations, conducted by the researcher during her field trips to Orkney, and informal conversations with other visitors during those trips.

Prior to this discussion, however, several limitations to the information presented here should be noted. Firstly, the statistical sources are scattered and provide at times conflicting information. Information on volume tourism, apart

from cruise calls and passenger numbers, is available only from the Orkney Volume Tourism Management Study (Staiano and Matthew 2017), conducted in 2017, using data collected before that. Information on independent visitors is available from the 2019 Visitor Survey (Progressive 2020). Trends information is derived from Orkney Economic Review reports (published every year), which are based on the Scottish Tourism Economic Activity Monitor (STEAM) and at times vary significantly from other sources, which was also acknowledged in Staiano and Matthew (2017).

Secondly, it is also worthwhile acknowledging that tourism, especially cruise tourism, and therefore the subject of visitors, is a very prominent discourse in Orkney. To do this discourse justice, an in-depth analysis of the varied opinions, reasons and language, expressed in the conversations regarding which type of visitor is 'right' and which is 'wrong', is required. It will need a careful statistical evaluation to understand the difference, if there is one, between facts and figures, and people's perception of the positive and negative impacts of each type of visitor. Therefore, and given the lack of robust, comparable, relevant and up-to-date statistical data, it was decided that it would be unhelpful to try and unravel this complex phenomenon in this chapter. To meet the objectives of this research, the chapter presents only the main themes in this discourse.

8.1 Who visits Orkney

Visitors to Orkney are divided into two main categories – 'independent' and 'volume' visitors (commonly known as day-trippers). The 'volume' category includes cruise visitors, and groups arriving from mainland Scotland (mainly via John O'Groats ferries) to continue their Orkney trip on a coach³⁰. Everyone else is classed as independent (which also includes Visiting Friends and Relatives (VFR) and travel for business).

All visitors to Orkney (volume and independent) mainly arrive from elsewhere in Scotland, the rest of the UK, Europe, Nordic countries and the USA. While the majority of independent leisure visitors are coming from the rest of the UK (Progressive 2020), there is no detailed information regarding the origin of the

³⁰ Hereafter referred to as 'ferry-to-coach' tours.

visitors coming on cruise or coach daytrips. The only data available is the port of departure of cruise vessels before they arrive in Orkney, however, this does not indicate the nationality of the passengers, nor the home port of the vessel. From the available data, however, it can be learnt that most of the ships come from Scottish ports, followed by England and Nordic countries, such as Norway, Iceland, Faroes and Greenland. Some ships are also arriving directly from Hamburg in Germany (Orkney Harbour Authority 2023a).

Another important attribute of visitors to Orkney is the age group of the visitors. As previously, there is no statistical information on the age of cruise passengers, visiting Orkney, however, the main age group of independent visitors is 55-64 and 65+, constituting 27% and 24% of total independent visitors respectively (Progressive 2020). It can be argued, however, that while the age distribution of all the visitors can be important to develop relevant tourism offers and enhance the experience, it is the age of independent visitors that has more impact on destination sustainability.

Age affects not only the sustainability of the tourism industry (as MI-25 put it: *"I mean, you know, we're literally selling to a dying market at the moment"*) but affects the sustainability of Orkney as a place where people live. Older visitors are regarded as having more means, looking for convenience and willing to pay for it:

"So we do we do appeal to a certain type of person. Mostly older people, with plenty of money." (MI-22)

Potential sustainability consequences of this were noted by another participant in 7.2.2, reflected in high prices for accommodation and the subsequent threat of gentrification (7.3.1). Overall, however, based on available statistics from years before the COVID-19 pandemic³¹, the numbers of visitors in both groups (independent and volume) are similar, with around 150,000 volume visitors arriving at Orkney on cruise and ferry-to-coach tours annually (Staiano and Matthew 2017), and over 190,000 visitors arriving independently, of which 126,000 are leisure visitors (Progressive 2020).

³¹ Prior to 2020.

The growth in visitor numbers has been fast over the years prior to the pandemic, especially notable is the growth in cruise visitors. Figure 8.2 illustrates the trend prior to the pandemic³².

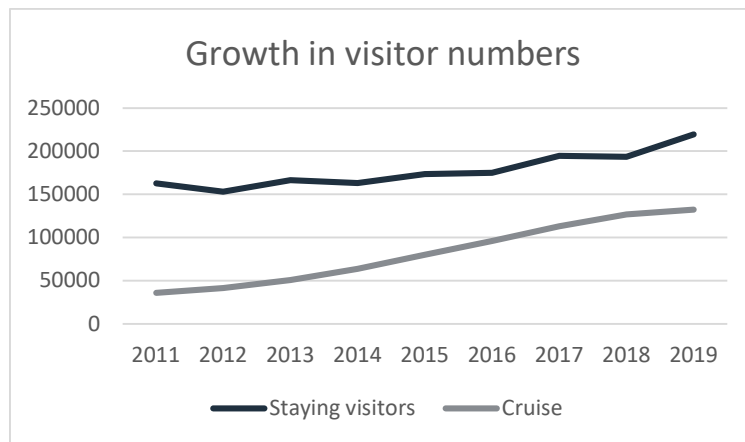


Figure 8.2: Growth trend in visitor numbers (adapted by author from Orkney Islands Council 2019)

Such rapid growth and the desire to harness the economic benefits of this development, but at the same time protect the attributes of Orkney that attract visitors in the first place, were already expressed by the Orkney community at the time of Orkney Volume Tourism Management Study (Staiano and Matthew 2017). The data collection at the basis of this thesis was conducted in 2022, some 5-6 years later, and similar opinions were expressed by the participants, indicating that little change has taken place over the years, despite (or perhaps because of) two years of COVID-19 pandemic. This discourse is rooted in the contested perceived value of each type of visitors to Orkney's economy, society and environment. As Ren et al. (2021 p.2) argue, in cruise tourism “there are different ways of valuing it, as it connects to the practices of a wider group of different stakeholders”.

The existence of these two types of visitors, with different attributes, experiences, needs and impacts, underpins one of the main points of contention within Orkney community, which was clear throughout the interviews. On the

³² As noted at the beginning of this section, the information at the basis of this chart is incomplete, as it excludes ferry-to-coach visitors (volume) and varies notably from Orkney Visitor Survey 2019 (independent), however the overall trend is shown for illustrative purposes.

one side of the debate are those who emphasise the negative impact of volume tourism against the limited economic contribution of such visitors, as is frequently observed in other destinations (James, Olsen and Karlsdóttir 2020; Ren et al. 2021). In this case, independent visitors are perceived to be of high value, due to their contribution to the local economy, deeper interest in Orkney, and perceived low negative impact on communities and the environment, also noted by James, Olsen and Karlsdóttir (2020). On the other side are those whose businesses are reliant on volume tourism, and limitations on their arrivals may cause a significant impact on their livelihoods. In this group, some argue that claims of high impact and low benefit, relative to independent visitors, are unfounded and that the benefits from volume tourism cannot be underestimated.

“Yes, the one an obvious one is Brig Larder, there's a sort of shop that does all things Orkney into quite high standard, a very high standard. Very well marketed and a very pleasant place to be. And the owner there I speak to often and there is nothing but positive things about cruise liners.” (MI-18)

Such opinions confirm again the stronger disposition towards economic benefits, as opposed to social and environmental impacts, where the perception of benefits usually has more weight than the perception of impacts, to determine the value (Nunkoo and Ramkissoon 2011). However, since it is this perception that is presumed to determine support for development, as discussed in 4.2 (Rasoolimanesh et al. 2015), the question that Brida and Zapata (2010 p.224) ask is “are we sure that the benefits of attracting cruises to a tourism destination are higher than the costs?”. Looking at it critically, this may mean that higher *perceived* benefits (measured simply by financial income for certain businesses) can overshadow equally high, or even higher, social and environmental costs to the community overall. Moreover, it can obscure the “invisible burden” of tourism (The Travel Foundation 2019).

Nonetheless, acknowledging the benefit of all tourism to Orkney, some also argue that labelling ‘good’ and ‘bad’ tourists is unfair and causes an unnecessary divide within the community, as well as risking damage to Orkney’s reputation as a welcoming community (6.5). As was noted by a participant who works at St Magnus Cathedral in Kirkwall:

“And in the Cathedral and I say this to everybody, regardless of what side of the debate they're on, when a person walks in through the door, I don't actually care what method of transport they used to get here. I don't care how long they're in Orkney. I don't care how much money they've got. I don't care where they're from. The thing that I care about is that if they come into the Cathedral that they have the best possible experience that they can have.” (MI-12)

Yet, those who benefit from either one or another type of visitors continue this discourse, emphasising that the dichotomy is not being adequately addressed by those who plan and manage tourism in Orkney. As was argued by one of the participants, who operates private tours for independent visitors:

“And nobody has ever addressed the serious dichotomy we're having here in Orkney between independent visitors and day trippers. The cruise liners, just to take one example, generates no end of a debate, discussion, hostility, because the cruise liners, a lot of tourism businesses in Orkney depend on the cruise liners. And a lot of tourism businesses in Orkney, like mine, shy away from the cruise liners. Wherever the cruise liners go, I'm in the opposite direction.” (MI-09)

This dichotomy is manifested not only in perceived added value, relative to social and environmental impact, but in the conflict that arises between volume and independent visitors, most notably in the main visitor attractions, such as Skara Brae and the Italian Chapel. According to some participants, such conflict often results in a negative experience for independent travellers (also noted in James, Olsen and Karlsdóttir 2020). Understandably, such sentiment was mainly expressed by participants (and echoed in private conversations with the researcher), who do not directly benefit from volume tourism (e.g. MI-10; MI-11; MI-15) or have limited involvement in tourism in general. However, this was also noted by some strategy-makers (e.g. MI-04; MI-06), indicating their engagement with the opinions of members of the Orkney community (7.2.3).

8.2 Alignment with sense of place as an antecedent to perceived value

The previous chapter included some reflections from participants regarding the development that takes place in the Orkney landscape. This section further

unpacks the relationship between tourism and visitors to Orkney and the sense of place attributes, revealed in earlier discussions. To this end, in the interviews, the participants brought up several issues associated with tourism impact on the sense of place for some members of the Orkney community:

"...it really affects the sense of place of many people who live here, because it's just kind of used to be quite an empty landscape. That's all part of the aesthetics, I guess, of living in, part of the sense of living here. So for many, it's quite an offence to see big groups coming." (MI-16)

This confirms the special relationship many of Orkney residents have with their *place*, the protectiveness of it, and resentment of anything that may change it to something unfamiliar and different, as discussed in 6.6 (Peng, Strijker and Wu 2020). This is echoed by a participant, who, acknowledging that tourism is important, argued that its further development could change the essence of Orkney, not only for residents but for visitors as well.

"...Orkney has a certain atmosphere. I think, you know, you can find a beach all to yourself if you really want to. I don't want that to change, but I don't think that means that, you know, there shouldn't be drives towards improving tourism numbers or spend. Yeah, it's more, I think, it would be if Orkney just allowed kind of uncontrollable mass tourism. It would just lose what it is that makes Orkney worth coming to." (MI-19)



Figure 8.3: Beach "all to yourself" - Waukmill Bay. June 2022 (author)

Another noteworthy point was brought by a participant, who emphasised the difference between perceptions of tourism between older and younger community members, which resurfaced during the pandemic when the travel restrictions were in place and no visitors were allowed to the islands.

“It was really interesting in the pandemic when we were in isolation, I remember my neighbour sort of saying, this is what it was like 30 years ago. In the summer, there was no tourists. The beaches were empty. It was really quiet and it was peaceful. And I thought that was really interesting. And it kind of, you know, it didn't feel we were missing anything, if that makes sense. It really did feel very natural. And I think for the older demographic, it was a bit more like home. It was a bit more like childhood.” (MI-10)

This confirms how tourism, or its perception by individuals, affects their sense of place. And vice versa, the intrinsic sense of place affects the attitudes towards tourism, and its value is determined by the extent to which the sense of place and how the place *is* as a result of tourism, aligned. Section 4.3 touched on the literature on this topic, referring to the impact of place identity (Wang and Chen 2015; Wang and Xu 2015) and place image (Stylidis et al. 2014) of residents on their support for tourism, and 7.2 saw the importance of sense of place in place branding, to increase residents' support (Aitken and Campelo 2011; Kaefer 2021).

Here it seems relevant to bring up the concept of Not-In-My-Back-Yard (NIMBY) and see how it manifests in Orkney. Based on the NIMBY concept, the developments that are happening elsewhere receive less prominent attention from the locals, than those directly affecting their immediate surroundings (Hateftabar and Hall 2023). Indeed, some participants reflected on the NIMBY factor within their own perceptions and feelings towards developments. One interviewee, who lives in a popular area for visitors in West Mainland, reflected:

“There's definitely a bit of NIMBY-ism as well because when it gets really busy at the beach or we've got buses trundling past our single track roads down, you know, next to our house, I don't like it. I don't enjoy it. [...] But when I'm in the office here in Stromness and I walk down the street and I see the street full of people, [...]. It's really nice to see people in the street and enjoying all the little lanes and go into the cafes and the local shops. And so it's definitely that's just me being selfish.” (MI-29)

Another interesting reflection came from a different participant:

“I live on South Ronaldsay, which is an island linked by the Churchill barriers to the south, so I sort of chose a house to buy, which out of tourism loop, nowhere near the road to Skara Brae, obviously.” (MI-02)

Paradoxically, the participant is an incomer, who by occupation is operating with a degree of power to drive tourism development that is often critiqued by others, showing a degree of NIMBY in this case. However, looking through the archipelago layer of context, the situation may be more complex. While many emphasised the uniqueness of each island of the Orkney archipelago, Orkney as a whole was seen as the basis of people’s place identity, place attachment and sense of place (7.2.1). One participant remarked on the essence of Orkney as a whole:

“[...] there's an essence of Orkney, there's an essence that we've got to protect and preserve and so that visitors keep coming back and they still feel that essence of Orkney life. And that covers landscape and, and infrastructure and the culture, the language, you know, and it's not something that is almost undefinable as to what it is.” (MI-27)

In agreement, Plieninger et al. (2018) argues that in archipelagos, high value is placed on landscapes of the archipelago as a whole, and not only those closest to the place of residence, which is consistent with the participants’ reflections of Orkney as a place and Orkney as people above, but contradicts the NIMBY-ism, expressed by some participants. This is because the root cause for attitudes towards development is not necessarily distance from one’s ‘backyard’, but the alignment of the development with a sense of place, expanded to Orkney as a whole. This observation was also made by Hateftabar and Hall (2023 p.4), confirming that it is the “emotional response to what they see as a disruption to places they have developed a close dependency on (rather than simple NIMBYism)”. A more detailed discussion of the most prominent constructs of tourism value (benefits and impacts) is presented below.

8.2.1 Economic value

When discussing the benefits of tourism to Orkney with the participants, most of the discussions were led with economic benefits. However, as explained in (1.2),

the degree of Orkney's reliance on its tourism industry is notably less than other areas in Scotland. As heard from an interview participant:

"... see the thing is because you've got such a diverse economy, we're not, we're not as dependent on tourism as a lot of other places. For instance, if you went to Skye or Outer Hebrides, Skye is just a 100 percent tourism."
(MI-22)

However, margins are narrow:

"So I think the stakes are higher in some respects because it's marginal, you know, but that is how people survive, you know, is by very narrow margins in general and even more so in rural areas." (MI-10)

Nonetheless, the economic impact of tourism is significant, and many of Orkney residents are reliant on it. In addition to the income from visitors to the local businesses and organisations, employment opportunities were noted by interviewees as a tangible benefit from visitors, with one participant referring to it as the "biggest benefit" (MI-22). Moreover, as will be seen below, tourism helps maintain the retail sector, which in turn employs people and contributes more to the economy. An interviewee gave these examples:

"Shearer [large popular independent shop in Kirkwall] spent thousands building a gun, an internal gun shop and expanding redoing the upstairs and all the rest of it. But they couldn't have done any of that without tourism money, which they get in the summer. Same applies to the Brig Larder [famous local produce shop in the centre of Kirkwall], which is beautiful, could be an Edinburgh shop." (MI-23)

This linked to the discussion on mixed placemaking (7.1.3, 7.1.4), which showed that alignment between mixed placemaking activities, such as shops and products for sale, with the sense of place of some residents appeared to be stronger than other types of placemaking, with few issues, noted by a handful of participants (7.3).

8.2.1.1 Income

According to the latest available data from Orkney Visitor Survey 2019 (Progressive 2020), it is estimated that over £67M is contributed by independent visitors to Orkney's economy, spent on accommodation, food and drink,

shopping, travel and entertainment. Due to the availability of this indicative data, the question of what the benefits are from independent visitors, and how they are distributed, is not as pressing, as with volume tourism. Therefore, although independent visitors also make use of resources, thus incurring some costs on Orkney's environment, infrastructure and community, it is the benefit of volume tourism that is being questioned by Orkney residents.

"And they're really not contributing to the community at all, but they are contributing to the depletion of the resources." (MI-15)

This is exacerbated by the fact that even if there is a financial benefit, its distribution is not clear, or, as some point out, not equitable, benefiting only certain people and organisations, while others either suffer the impacts or do not take part in this sector at all (mainly attributed to ferry-connected islands).

While there are no up-to-date statistics on spend of volume visitors per trip, some indication of this can be taken from the Orkney Volume Tourism Management Study (Staiano and Matthew 2017). The figure of £52.50 as the average daily spend of a cruise passenger was estimated in 2013, as reported in the document. This included £27.20 spent on the shore excursion, which at the time of the survey was mainly 'leaked' from Orkney to an external provider (Staiano and Matthew 2017). Indeed, as explained by James, Olsen and Karlsdóttir (2020), cruise industry is known for the high economic leakage, due to their power to decide on the port of call and control over shore excursions. The report, however, acknowledges that since 2013, shore excursions have been increasingly provided by local providers, which has had a positive impact on the financial benefit of cruise visitors. Importantly, the same report advised that around £10 was spent by each crew member of the cruise ship if they decided to go on shore (Staiano and Matthew 2017). This number is very small, compared to the overall economic impact of tourism in Orkney, but it is a contribution, nonetheless. Considering the lack of robust data on the economic contribution of the cruise sector, and the need to receive buy-in from Orkney people ahead of another busy season at the start of 2023, Orkney Islands Council stated:

"It's difficult to quantify the exact value of cruise to Orkney but it is estimated as being between £12-15 million annually with a significant number of people

working directly and indirectly with cruise and tourism in the islands.”
(Orkney Islands Council 2023d)

Acknowledging that a contribution exists, one participant explained:

“I’m told again it’s anecdotal, but speaking to retailers in Kirkwall, there are certain liners they know are going to be big spenders and there are others equally that they know will buy very, very little. And so we need to I think start to be a bit more selective in who comes to Orkney and instead of getting it just totally numbers, getting a quality.” (MI-18)

In the case of the ferry-to-coach tours (provided largely by John O’Groats ferries), there is even less data. However, since the tours are booked directly with the provider (non-Orkney based), the contribution to Orkney would amount to an entry fee to the Italian Chapel (£3.50 at the time of writing) and lunch. Figure 8.4 includes the tour brochure from the John O’Groats Ferries website.



Figure 8.4: Orkney Day Tour with John O’Groats ferries (John O’Groats Ferries 2023)

While the data on volume visitor spend is incomplete and outdated, the financial benefit from the cruise calls themselves is recorded and published annually by Orkney Islands Council’s Harbour Authority. Table 8.1 below provides the latest available information from the financial year 2021-2022.

	2019/20	2020/21	2021-22
Port Calls	156	0	25
Gross Tonnage	5,256,422	0	2,055,437
Passengers	131,506	£0	19,347
Port Dues	£1,574,282	£0	£604,962.71
Passenger Dues	£217,845	£0	£33,550.25
Pilotage	£205,783	£0	£155,916.25
Fresh Water	£37,235	£0	£2,552.55
Revenues	£2,269,685	£0	£805,773.51

Table 8.1: Cruise Ship Comparative Data (Orkney Harbour Authority 2022 p.11)

Disregarding the years of COVID-19 disruption, over £2.2M was contributed to Orkney in the year before the pandemic. Despite the apparent significance of such contribution, reinforced by the fact that it is deposited into the public funds by OIC, and potentially can benefit the whole of Orkney, this is a contested subject in the Orkney community.

8.2.1.2 Benefits distribution

This contention is caused by the Orkney County Council Act 1974, stating the income generated from marine operations of any kind, including cruise, in any of Orkney ports and harbours, can only be spent on Orkney ports and harbours and any other work within OIC Harbour Authority (Orkney Harbour Authority 2022). While this provision should (and does to an extent) contribute to the public good of Orkney residents, including those residing on islands and not directly impacted by volume tourism, many of the participants expressed concerns regarding such provision and frustration with how the council handles this income.

“...which is why they want to build more piers all over the place for cruise ships, including a large, big concrete slab in Scapa Bay, at Gatenip just outside of Kirkwall. Which is going to have a massive ecological impact on the area.” (MI-11)

This argument is rooted in the presumption that because the money can only be spent within the Harbours Authority, it is being spent on expanding infrastructure for yet more heavy operations, such as the cruise and energy sector, which will bring yet more revenue. This is while other needs of the

Orkney infrastructure, such as the state of Orkney roads, aggravated by the same cruise arrivals, remain unaddressed due to the lack of funds allowed to be spent on such improvements.

“And yet none of these things which just kind of suffering as a result of increased tourism, is being addressed, you know, is being helped by the money that tourism is bringing in.” (MI-11)

Such a situation, however, is not unique to Orkney and is a common practice in places, where ports and harbours are managed by a local authority as a separate division with separate accounts (Helgason 2023). Imposing limits on environmental grounds is not taking place due to the significant economic benefit, as was argued by Higgins-Desbiolles (2011) and noted in other destinations (James, Olsen and Karlsdóttir 2020).

Such state of events contributes to the perpetual discourse on cruise tourism in Orkney, with voices against it often overshadowing those who see a direct benefit from the sector (such as tour guides, jewellery shops etc.), based on the *perception* of a lack of benefit (Gursoy, Jurowski and Uysal 2002). It is argued that a more transparent and relevant distribution of benefits can improve the relationships between locals and the cruise industry in Orkney, as stated by one of the interviewees:

“I think that's been one of the big criticisms over the years with volume tourism is if they could see a direct economic benefit to themselves, if it was a really simple equation like one cruise ship equals new play park equipment.” (MI-12)

Transparency in benefits distribution is seen as a manifestation of power, exercised by those who make decisions on the development and bring benefits. Interestingly, however, in the cruise sector specifically, power dynamics are made more complex by the addition of another powerful stakeholder – cruise companies. As noted previously, this stakeholder has the power to decide on port calls and shore activities (James, Olsen and Karlsdóttir 2020), making an exchange between them and their destination imbalanced (Ap 1992), exacerbating the powerlessness of local communities.

This frustration regarding benefits distribution, or the lack of volume tourism benefits in general, is reinforced by the impact visitors have on Orkney socially and environmentally, as will be seen later in this chapter. Prior to that, however, the archipelagic context of this analysis must be addressed, which plays an imperative role in the subject of benefits distribution.

8.2.1.3 *Islands*

Island communities outside the Mainland have their own relationships with visitors and tourism development in Orkney. It is widely argued in Orkney that to be sustainable, benefits distribution from visitors should include not only the Mainland but outer isles as well. However, the meaning of the term 'benefit' plays a significant role in how it transpires in practice.

Firstly, the distribution of benefits to the isles means distribution of revenues attained from visitors to the public funds of the local council (such as harbour dues). As per the above discussion, this causes some ambiguity in whether these 'benefits' indeed benefit the community. The spending of harbour dues funds on port and piers infrastructure across the Orkney Islands, where required, is, of course, beneficial to the community in general, however, it is not as tangible and direct as an improvement to roads, playparks and other local facilities.

Secondly, distribution of benefits to the islands means distribution and dispersal of visitors themselves, bringing revenue to the businesses and communities on those islands directly. This, however, is a difficult task, met with numerous challenges, such as lack of suitable infrastructure and facilities, less adequate transport links, duration and cost of travel and, of course, weather (2.3.2, 2.3.3). One of the participants, living on the Mainland, noted:

“...it's the outer isles who perhaps feel the disconnect because they don't get the same level of tourism and activity where they live.” (MI-03)

Increasing the number of visitors to the islands was the subject of many conversations, and participants, from the Mainland or the outer isles, promoted the need for dispersal as a key factor in the sustainability of Orkney tourism. However, a major critique of the actions to allow dispersal was expressed,

especially to the outer isles, where the lack of investment in infrastructure prevents greater visitor numbers.

“So how are you going to disperse into other places if you don't invest in the other places to provide facilities?” (MI-25)

This is seen as a main drawback of the Tourism Strategy and other development plans (7.1.2.2), which are regarded by many as the Mainland-focused and not adequately addressing the needs of other islands of the archipelago. As was remarked by a participant from Westray, talking about poor road conditions to one of the main visitor attractions on the island (RSPB Noup Head):

“And of course, if you have to share this with any people in Orkney Mainland involved in tourism industry, they might yawn a little bit for what I'm about to say. But I would say it's becoming more obvious that it is a problem.” (MI-13b)

Yet, despite that many of the participants expressed the need to disperse visitors, and therefore benefit the islands, some argued that not all the island communities want more visitors and that the individual needs of each island community must be recognised. To this end, Ioannides and Petridou (2015 p.244) ask: “does every island have to strive to become a tourist destination, just because this seems to be the Holy Grail for places with few alternative development options in the 21st century?”. This was echoed by one participant:

“...sitting on Mainland, it's easy to talk about dispersing benefit to the other islands like, how should we put it, a say by it, just assuming that all those other islands would like tourists to go to them.” (MI-25)

Nonetheless, as already discussed, in the archipelago context, when economic benefits are not equally distributed, the impact on the environment is felt by everyone, because it affects ‘Orkney’ as a whole entity (6.5, 7.2.1), and it is the whole of Orkney sensed as a place, regardless of the place of residence.

“And so we really have to start looking at Orkney it's like a living entity. And if you start chopping bits of here and there, how's that going to affect the rest of it? And so we really need to look at it, like I said, it just like a, a large beast, made up of many parts that needs to be looked after. Otherwise, you know, we. We don't have this entity to live on anymore.” (MI-11)

This opinion was expressed in the context of the discussion of the environmental impacts of Scapa Flow development (7.1.1) but illustrates well how deep the concern is about changes and their impacts on Orkney as an entity.

8.2.2 Social value

The social benefits of tourism were widely discussed, and perceived positively by many participants, mainly in the context of jobs provision and facilities and amenities improvement:

“I think one of the things that Orkney is fortunate in compared to, say, the Western Isles, is that young people will grow up here. They will often move away for tertiary education, maybe work a while, but often when it comes to settling down, bringing up the family, they come home. And that only happens because there are jobs here and there's a good quality of life and the tourism helps sustain that.” (MI-08)

Moreover, tourism is also seen as a tool to develop services and facilities for locals, especially in smaller communities, where the local population is not in sufficient numbers to justify business, facility, or service:

“So that could be down to business in the high street or a facility or a business that, service that's being created in another community, quieter community, that may not have had it from their own population.” (MI-27)

The vibrant and busy festivals (7.1.3) and cultural activities were also mentioned as benefits from visitors (Walker 2019), and the opportunity to learn about the world from the conversations with visitors (also noted by Stewart, Dawson and Draper 2011).

“Listening to people who are, you know, various deniers of various things and understanding why, it has enriched me culturally because I've met people that I would never bet for. And I think that would be a real shame if we lost tourism because it's enriching us with learning about the world.” (MI-14)

However, a number of themes were recognised in relation to negative social impacts, rooted in perceived lack of engagement with Orkney heritage and character, as well as “people pollution” (Klein 2011 p.112), as discussed below.

8.2.2.1 Orkney appreciation

In relation to tourism and its impact on the sense of place, contributing to the perception of value, heritage appreciation plays an important role. As was mentioned in 8.1, independent visitors are regarded as more valuable, not only due to their higher perceived economic impact, but also their more apparent perceived appreciation of Orkney, not least its heritage. To explain this need of heritage appreciation, an interesting point was made by one of the participants. MI-15 reflected on the MSc programme in Orkney and Shetland Studies, available at the University of Highlands and Islands in Orkney, explaining that when the programme was launched, there was some scepticism, including from Orkney residents, about who would want to come and study the course. It was then argued that Orkney's heritage, apart from the neolithic and wartime history was of no interest to those outside Orkney. However, the programme proved successful and showed the importance of Orkney's heritage to those outside Orkney.

“It was important. And I think up until that point, people had an interesting idea about their culture and heritage. Of course, it was important to them, but they weren't necessarily sure how important it was to other people.” (MI-15)

This to some extent adds to the point made by Lewicka (2008) that those with place attachment are more interested in its history. Here, it is the realisation that others appreciate and are interested in the history and heritage of their place that helps residents strengthen their place attachment. However, following the above argument by Lewicka (2008), those with arguably less strong place attachment to Orkney (simply because they are non-residents) will develop their Orkney place attachment further once they cultivate and fulfil their interest in heritage and past. This analysis can be further projected to visitors, who by meaningfully engaging with Orkney heritage not only develop their own place attachment but also help strengthen place attachment of those who call Orkney home.

Moreover, in volume visitors' case, a short duration of a daytrip to Orkney, and therefore a densely packed itinerary, inevitably means that time spent at each site is very short, and not sufficient to explore and appreciate the *place* in full.

According to some, this creates feelings of insult, to the place, and the community, but also visitors and their experience, since they do not get to deeply engage with Orkney and appreciate it for what it really is. This is rooted in the very deep sense of place and pride, experienced by many residents of Orkney, for the reasons discussed earlier.

“So it also feels like, that feels almost like an offence both to themselves and to the visitors, that they don't get the real feel of Orkney and it's like they get a misrepresentation of this place that we're very proud of.” (MI-16)

Another participant, comparing cruise tourism to fast food chain McDonald's, explained:

“They've just had no time to actually connect to the place to take it in, and it's [Orkney] just amazing. Yeah, they're just sort of being carted from place to place. And it kind of for me, it just kind of ruins, ruins all these really special places.” (MI-21)

Furthermore, some participants referred to unacceptable behaviour, expressed by some volume visitors. While such unacceptable behaviour is very rare and only took place on a handful of occasions, the memory of those events is deeply ingrained in the Orkney community, impacting the attitudes towards volume visitors. As heard from one participant:

“Back in the day in 2017, when we had people trying to open coffins going into the Cathedral and because they think the whole thing is Disney. And we had people stealing artefacts from Italian chapel and defacing the stones and stuff like that.” (MI-23)

Such behaviour towards Orkney's place and people is deeply hurtful for some residents. In many conversations, it was important for the interviewees to emphasise their resentment towards 'disneyfication' of Orkney and towards treating it like a “theme park” (MI-11), where everything that takes place there is staged for the visitors' entertainment. As observed by Relph (1976, cited in Smale 2006), by lack of authenticity such places induce *placelessness*, and prevent people from experiencing the *insideness*, which is so important for Orkney people (6.3). The topic of disneyfication was noted elsewhere, notably by Kennedy and Kingcome (1998) and their critical account of staged authenticity in Cornwall. In Orkney, Lange (2006) explored what effect simplifying 'history' to

'heritage' has on the identity of local communities and what role the tourism industry plays in it. Here, the concept of tourist gaze (Urry 1990) is also relevant, where tourists experience a version of the place, carefully prepared and offered to them by, not least, the placemaking activities (Chapter 7). Unavoidably, this version of Orkney will be different from the place, sensed and experienced by some locals, albeit, as Lange (2006 p.149) explains, the touristic version, or the "for-others" identity, of Orkney is often merged and accepted by some residents as Orkney's identity "for-self". As he argues, this creates some negative attitudes towards 'disneyfied' Orkney, fearing that the Orkney version they know will change or disappear (4.1).

Nonetheless, respondents found it important that tourism contributes to the cultural preservation of Orkney, where it is seen as an opportunity to tell a story and showcase Orkney places and people to the outer world, satisfying local pride. However, this benefit will not materialise, if reciprocity from visitors and their engagement with Orkney's culture and heritage is not obtained, which is essential for the local-visitor exchange to work for the benefit of both (Ap 1992). In social exchange theory (4.3.1), the concept of reciprocity plays a key role, whereby the exchange parties (here, host and visitor), provide equitable benefits to each other, reinforcing the exchange (here, support for tourism development), otherwise the exchange may be terminated (Ap 1992). The lack of this reciprocity, mainly attributed to the volume visitors, is seen as one of the diminishing factors of tourism value.

8.2.2.2 *Kirkwall streets*

Another common critique of volume tourism is the disturbance to the local population in Kirkwall. While some negative comments were expressed in Stromness as well, Kirkwall was brought up by many participants, speaking about their own experiences:

"But if it's, you know, if there's a day where there's two or three boats - I wouldn't go down the street, you know, there's no point. It's so busy you can't get anywhere to eat." (MI-19)

or referring to that of others in their community:

“They don't like queuing in shops, you know, and suddenly there's these people that they don't know and, in the queue, and there's a lot of snobbishness about it, I think.” (MI-12)

Such a situation was observed elsewhere, especially in small destinations, where locals and visitors compete for the same resources (Brida and Zapata 2010). Many arguments were underpinned by the fact that if there is more than one cruise ship in town, the number of people who disembark onshore in Kirkwall is perceived to exceed its population, thus causing negative attitudes amongst the local residents.

“...but there were 8000, one ship with 5000 and one ship of 3000 passengers arriving on the same day. That's almost if including the crew is more than the population of Kirkwall.” (MI-23)

While such numbers may seem exaggerated, this was mentioned in several conversations, which may be explained by such occurrences indeed taking place in previous years. To control such occurrences, OIC published a guideline to limit the daily passenger arrivals to Kirkwall to 4,500³³ (Staiano and Matthew 2017). Yet, some cruise ships that exceed this limit are still accepted at the port. For example, MSC Preziosa can carry 4,345 passengers and 1388 crew members (MSC Cruises 2024), which together amounts to more than half the Kirkwall population, underpinning the feelings of frustration by some residents. Moreover, despite the imposed limit, in 2018 MSC Meraviglia docked at Kirkwall (three times), carrying almost 5,000 passengers, with road closures put in place to manage traffic in Kirkwall centre. This confirms the argument by Brida and Zapata (2010), that many cruise destinations lack local government policy to control and manage cruise tourism, due to the benefits it brings. However, it was estimated that only 7% of cruise calls are made by large ships (over 3,000 pax), whereas most vessels (circa 72%) will be carrying under 1,000 passengers (Staiano and Matthew 2017).

During the observational trip in 2022 (5.4.2), the pandemic restrictions of cruise tourism were already lifted, which meant most of the days during that trip cruise

³³ Excluding crew.

ships were present, either only one, or at times two in a day, as illustrated in Figure 8.5 below. Some days, however, saw no ships arriving to Orkney.



Figure 8.5: Two cruise ships in Kirkwall: Silver Whisperer at Hatston Pier on the left, Costa Fortuna on anchorage on the right. June 2022 (author)

On the day illustrated in Figure 8.5 above, cruise ships brought to Orkney around 1,700 visitors³⁴ – the number lower than usual, since some COVID-19 restrictions on a number of passengers on board were still present. On the previous day, also with two ships (Europa 2 and Viking Venus), there were circa 1,200 visitors, arriving by cruise. In Kirkwall, a number of visitors were observed walking around central streets, and the atmosphere was vibrant and positive in the researcher’s view. Figure 8.6 below demonstrates the main shopping street in Kirkwall during cruise visits.

³⁴ The pax numbers were available on Orkney Harbour Authority for that season.



Figure 8.6: Albert Street, Kirkwall, on days with two cruise ships in town. June 2022 (author)

To contrast this image, the same street was observed on a day when no cruise ships were in town (see Figure 8.7 below). On the left, it can be seen that the street is completely empty. However, it cannot be said that this was solely due to the lack of cruise visitors since this was Sunday morning and the weather conditions were poor, therefore it could be expected to see fewer visitors and locals on the streets. This is supported by the photo on the right in Figure 8.7, depicting the same street on a day with no cruise ships. It can be seen that the street is busy with people, including local school children, visitors and people going about their business.



Figure 8.7: Albert Street, Kirkwall, on days with no cruise ships. Left: Sunday morning, wet and cold. Right: Thursday afternoon, dry and warm. June 2022 (author)

It was emphasised by the participants, however, that while frustrations about the crowded town and visitor attractions is frequently expressed by some members of Orkney community, others welcome the visitors and enjoy the hustle and bustle of the town.

“I like seeing a lot of people in the town, it's a lovely high street we've got. And when it's buzzing with people, it's a nicer place to be than when it's not.”
(MI-18)

It can be said that the importance of a vibrant high street with open local shops is linked to the sense of place in Orkney. It was clear that the people of Orkney regard their Kirkwall high street as a special and unique attribute of Orkney as a place and as a community, compared to elsewhere in the country. The interviewees passionately and proudly spoke about their town, emphasising its unique, and even somewhat superior status.

“Well, if you when you come to Orkney and you walk down the street in Kirkwall, we have one of the most vibrant high streets you'll find anywhere. We've got such a lot of nice shops, some food shops and jewellery shops, clothes shops and. Things you wouldn't expect to find in such a small town and anywhere else probably.” (MI-22)

While tourism receives its fair share of critique, such success of Kirkwall high street is often attributed to tourism, not least volume tourism, as was noted by another participant (MI-17). On the contrary, however, one of the interviewees described the lack of visitors during COVID-19 months in the summer, arguing that not all success is attributed to tourism and that the people of Orkney are also capable of keeping its streets vibrant and alive, as was illustrated in Figure 8.7 above.

“You know, me personally, I've never seen Kirkwall so empty on a hot summer's day. But interestingly, it was full of local people, like it was still very much alive. It was just had a different feel about it. It wasn't for... You know, it was a very genuine existing community and that is there underneath those layers of tourism and busyness.” (MI-10)

This opinion is another example of the interesting relationship between Orkney as a people and Orkney as a place (6.7). In this instance, it is the local people who play the leading role in the participant's pride of Orkney, making Orkney the place it is.

Nonetheless, the researcher observed that on the cruise days, the streets indeed felt busier, but not overwhelmingly. However, this merits a caveat that the observed days were not as busy as those with a potential 4,500 or more cruise visitors would be. Such days will inevitably include road closures, traffic congestions and much more crowded sites, which some residents will find unacceptable, while others anticipate or simply avoid altogether. In this instance, however, the researcher did not feel resentment towards the larger groups of visitors, did not observe negative behaviour or overcrowding, and generally found the busier streets in Kirkwall and elsewhere more attractive and vibrant, agreeing with some participants, quoted above. Acknowledging the difference between two observation trips (5.4.2) – during COVID-19 restrictions in 2021 and after they were lifted in 2022 - the researcher could reflect on the experience:

Despite that the number of visitors, whether volume or independent, did not detract from my experience of visiting sites or towns in 2022, I developed my own perception of the quality of the visit based on the interaction with other visitors and locals. In my fieldnotes I wrote:

"...despite COVID I had much more interaction with fellow visitors [in 2021 trip] than in subsequent visit in 2022. Generally, the trip was more successful, maybe because of the weather. But maybe because of the fact that there were less people, and those who did come up were there for a while and had more time to engage with fellow visitors and locals. And for locals, there were less visitors, but each encounter with a visitor was longer and more meaningful. It made such a difference for my own experience, and I'm sure for others too."

Vignette 8.1: Difference

It is important to reiterate here, that the researcher's opinion is by no means intended to determine whether participants' account of their own perceptions, opinions and experiences is 'true' or 'false'. It does confirm, however, that positive or negative perceptions are individual, and inevitably will be subjectively judged based on several factors, such as their sociodemographic situation (4.3). This can attest to the value assigned to a meaningful interaction with *people* during the visit, in addition to the interaction with the *place*. While the researcher's interaction with the place did not suffer from the number of visitors around, it was the interaction with people that was affected to a greater extent. The value, placed on the meaningful interaction, appears to be reciprocal – affecting both visitors and locals, driving their experience of Orkney and attitudes towards each other.

This is important to understand in the context of tourism development, where the definitions of value and success of tourism in Orkney prove to be subjective and biased towards the level of benefits gained from it. Such complexity challenges the strategic planning endeavours, which not only aim to sustain the tourism industry, but to ensure the sustainability of Orkney as a destination, and the people who call it home.

8.2.3 Environmental value

Some studies have been conducted on the environmental impact of various activities in Orkney, such as Climate Risk Assessment for Heart of Neolithic Orkney (Downes and Gibson 2019), and mandatory Strategic Environmental Assessment (SEA) process, conducted by OIC for any infrastructure project, initiated by them (MI-20). However, a robust evaluation of the environmental

impact of tourism practices on the Orkney Islands has not yet been performed, including an environmental impact assessment as a part of the Strategy development (MI-20). However, a number of sources addressing specific environmental challenges can be employed to understand the cause of these concerns, starting with cruise tourism.

8.2.3.1 *Sea and air*

The environmental impact of cruise tourism and cruise vessels has received significant attention worldwide (see Brida and Zapata 2010; Carić and Mackelworth 2014; Hovelsrud et al. 2021). These issues are recognised by many in Orkney as a considerable concern and thus added to the arsenal of arguments of those who debate against the cruise industry to the islands.

“So, for example, lots of cruise ships dumping dirty water in Scapa Flow is not attractive, right? That's a fact. You know, that's not a perception. That's something that happens that we're having to take on board as part of this process. The amount of energy and so on a cruise ship use is quite horrific, actually, and the amount of waste from a cruise ship is also quite horrific.” (MI-15)

Noteworthy is the participant's referral to it as a “fact” and “not a perception”. As was seen from the discussions throughout this thesis, benefits and impacts, as well as value of tourism and other developments, are often regarded as *perceived*, rather than referring to their factual accuracy. While the present study cannot confirm or deny the factual accuracy of this statement, it can evidence the strength of the participant's position on this matter, illustrating how impactful this discourse is in Orkney.

Nonetheless, one participant, acknowledging the significant environmental impact of the cruise industry, as a part of the overall shipping industry worldwide, argued that the sector is in fact leading the way in tackling its environmental impacts.

“They are leading on that. They have cleaned up their act immensely in the last five years and have used the shutdown periods to improve a lot of ships and do them to improve the standards.” (MI-25)

In addition, while arguing that all shipping is polluting and more needs to be done, the impact in Orkney is smaller due to the low sulphur fuels being used by ships coming to Orkney ports. Indeed, Orkney Islands are located in the North Sea Emission Control Area (ECS), introduced by the International Convention for the Prevention of Pollution from Ships (known as MARPOL), prohibiting use of heavy fuels with sulphur emissions over 0.1% in any vessel doing any operations in the designated zone (Orkney Harbour Authority 2020). This limit of 0.1% is more stringent than the overall worldwide limit of 0.5%, introduced by MARPOL in 2020.



Figure 8.8: Cruise ship and local ferry moving within Kirkwall Bay with emitting exhausts. June 2022 (author)

In addition, Orkney Harbour Authority applies a Ballast Water Management Policy in its largest natural harbour Skapa Flow, regulating the discharge by vessels to prevent water contamination and invasive species threat (Orkney Harbour Authority 2013). Yet, while these measures indicate that the negative environmental impacts of cruise, as indeed all shipping sector, are regulated and therefore reduced to an extent, significant concerns over these issues remain widespread in the Orkney community. Large ships, such as MSC Meraviglia, that carry up to 5,000 passengers, and an overall high volume of calls (total of 204 calls in 2023, Orkney Harbour Authority 2023a) cause significant environmental concern, especially given the lack of available shore power technology for large ships (Orkney Harbour Authority 2020).

8.2.3.2 Land

Although the environmental impact of cruise visitors at sea was acknowledged by the participants, it is the impact of the visitors while in Orkney that is at the core of contention among its residents, in line with James, Olsen and Karlsdóttir (2020). This is perhaps because the impact is seen, felt and experienced, and therefore its severity can be judged, albeit subjectively, based on its tangible manifestation 'close to home', rather than as a distant or invisible force.

This impact, in its environmental form, largely amounts to one main element: the impact of large footfall on environmentally and archaeologically vulnerable sites.

"So, you know, people come on the buses and so on, and they take them to Skara Brae and so on. And quite often places like Skara Brae and The Italian Chapel look like anthills, so many people on them." (MI-15)

Figure 8.9 might illustrate what the participant was referring to.



Figure 8.9: Skara Brae. June 2022 (author)

It is attributed not only to cruise visitors but all volume visitors to Orkney. The footfall is causing paths and land erosion, especially in the World Heritage Sites, such as the Ring of Brodgar, Skara Brae and Stones of Stennes.

“There are plenty of places to visit in Orkney, but the ones that are the popular ones are in very real danger of being eroded, and loss and damage to the environment there.” (MI-15)

On a day with two cruise ships in Kirkwall (around 1,200 passengers in total), the researcher observed groups of visitors arriving at the WHS sites, as demonstrated in Figure 8.10-Figure 8.11 below.



Figure 8.10: Group of visitors at Stones of Stennes. June 2022 (author)





Figure 8.11: Ring of Brodgar. Top: coaches parked at the carpark; Bottom: Group of visitors walking around the site. June 2022 (author)

Historic Environment Scotland (6.5.1.2), an organisation that manages the WHS in Orkney, implemented an array of protective measures to manage the visitors in their properties. For example, a footpath close to the ring itself was closed, and a new reinforced footpath was created around the monument, with information and guidance for visitors from staff, present on-site during the day (despite it being an open ticketless site). Figure 8.12 illustrates the issue and Figure 8.13 illustrates the measures.





Figure 8.12: Paths condition at Ring of Brodgar. June 2022 (author)



Figure 8.13: Paths protective measures at Ring of Brodgar. June 2022 (author)

At Skara Brae, visited around an hour later than the sites above, the site was notably busier (Figure 8.14). Several coaches were noted in the carpark, alongside many private cars and campervans, and the large carpark overall was nearly full. Skara Brae is a ticketed site, and booking is required from all groups and individual visitors, and at the time of the visit there were no available tickets for that time slot (the researcher, however, was allowed in). The indoor part of the site, including the café, was full, however outside, due to the large area of

the site, it did not feel crowded. Here the groups were greeted by a guide and the visitor's movements were monitored by staff to ensure compliance with restrictions put in place to protect the archaeology.



Figure 8.14: Groups of visitors at Skara Brae. June 2022 (author)

In addition to the Skara Brae, a booking system is in place for the ticketed site of Maeshowe Chambered Cairn, where visitors can only enter the monument in small groups, accompanied by HES guide. Despite these measures, however, concerns for the impact of large footfall are still prominent in the Orkney community, and some members opine that a reduction in numbers is the only solution to the environmental, as well as social, impact of volume visitors. A categorical opinion was heard from one of the participants, whose sense of place was mostly rooted in physical aspects of Orkney:

“The simplest way of doing it is to get rid of the people. If you get, if you take the numbers down to hundred and twenty [cruise ships per year], the problem is suddenly much less.” (MI-23)

Interestingly, another participant reflected on a similar issue. He questioned the power dynamics in such decision-making, alluding to the fact that numbers of cruise ships are ultimately controlled by the entity, that benefits from it the most – the OIC, in conjunction with the cruise companies themselves, as noted earlier.

“It's positive to a point, then I think, you know, the volume of people gets to such an extent that, well, it's too many. But it's interesting to decide, who decides what is too many.” (MI-19)

Another participant questioned the success of such measures, in relation to rapid growth of the sector:

“how can you start to control that now when the numbers have escalated so quickly?” (MI-29)

It can, therefore, be argued, that while the number of volume visitors is a concern to many, some feel powerless to influence the situation, therefore weakening support for tourism development (Nunkoo and Ramkissoon 2011).

It is noted above that the impact on vulnerable sites is attributed mainly to volume visitors, among which are those arriving on John O’Groats (JOG) ferry-to-coach tours. Some participants claimed that the impact, environmental or other, is more significant from these visitors, than cruise. The main argument for such opinion is the apparent lack of control, or system by which these tours are operating in Orkney since they are run by an external provider as all-inclusive tours (8.1) and do not have an interest in protecting Orkney's environment or its people. According to some participants, echoed in other personal conversations with the researcher, every day around half a dozen coaches collect passengers at the arrival point on South Ronaldsay, from where “they're just being wheiched³⁵ around the sites” (MI-15) all at once. This is as opposed to cruise visitors’ management, whereby the coaches are staggered around different sites to prevent overcrowding and minimise negative impacts (also noted in Staiano, Weaver and Ferguson (2020)).

“They're [JOG tours] just allowed to operate as cowboys and I think that's wrong, especially when you look at the cruise ships that have come up with the system.” (MI-28)

As was noted by Butler (1997) almost three decades ago, Orkney already saw an issue with the rapid growth of the coach tourism, such as road and ferry capacity to access sites. This alludes to the limited strategic planning for

³⁵ In Scots - speed through the air, rush (Stooryduster 2002).

sustainable growth, notably because tourism then, and some argue now as well, seen as a “Cinderella industry” (MI-09), not receiving due attention and resources from the local government (Butler 1997; Baldacchino 2006b).

As observed by the researcher, however, outside the main attractions and main town centres roads, beaches, attractions and paths were quiet, even on the cruise days (e.g. Figure 8.15).



Figure 8.15: Newark beach. June 2022 (author)

The contrast between the places is noteworthy, since on the one hand it provides the variety some visitors and locals may seek, however on the other hand it supports the argument towards visitor dispersal from the main sites to other places in Orkney. Dispersal has been a major subject of strategic planning in Orkney (9.2), however, despite the rich variety of places of interest across the archipelago, it has proved to be a significant challenge (Thuesen 2022).

8.2.3.3 Independent visitors

Fundamentally, however, “all tourists pollute” (MI-25). While independent visitors are regarded in Orkney as more sustainable and therefore more valuable, the core issue of any travel and transportation to the islands is its environmental impact (Butler 2018; Armstrong and Read 2021; Baldacchino 2021). In Orkney, all public transport runs on non-renewable fuels (at the time

of writing), and in conjunction with cars and campervans moved by ferries to and between Orkney Islands, the environmental impact of independent visitors is acute.

“...there's this perception there's good tourist and bad tourists and we have to accept that all tourists pollute. If we're going to look at this from a purely sustainable point of view, all tourists have had to have had a carbon cost to get here.” (MI-25)

In agreement, another participant remarked:

“...we're shipping people in all the time, so the people are coming by ferry, the people are coming in by air. And so we were immediately on the back foot with respect to genuine sustainability and the carbon footprint.” (MI-09)

This inevitable issue is also driving the solutions. Projects such as HySeas, developing a hydrogen-powered ferry and trialling the first hybrid-electric plane by Ampaire are two main examples of Orkney's role in technological advances. These, and other projects targeting sustainable energy and transport, such as ReFLEX Orkney, will eventually contribute to solving the issue of the environmental impact of the 'crossing' (2.3.2), in Orkney and beyond.

Despite the majority of comments regarding the negative impact being attributed to the volume visitors, additional comments were made regarding the impact of independent visitors. The main point of contention in this context were campervans, their impact on local transport, roads, and resources, affecting the daily lives of the local population, as well as the environmental impact of this type of transport. According to the Orkney Visitor Survey (Progressive 2020), in 2019 10% of all independent leisure visitors travelled in Orkney in campervans or motorhomes. While there are several organised campsites on the Mainland and across the larger islands, some visitors prefer to choose other parking locations and use the campsites only to fill in water and dispose of waste when required. Therefore, some perceive these visitors as less valuable, because of their low economic benefit (largely to accommodation providers), despite that they are usually staying for a longer period of time.

“Yeah, we were thinking about doing a campsite. And I did a bit of a survey into it, and it said people with campervans don't tend to leave a lot of cash in wherever they're going.” (MI-24)

The decision by some campervan visitors to stay outwith designated campsites puts some pressure on local infrastructure, such as roads and car parks. The most notable example of this issue is the carpark of Ring of Brodgar (Figure 8.16), which is free and open for anyone to use. In conversation with the HES representative, the impacts of this were discussed. Despite that it is not yet seen as a major issue, it is expected to exacerbate if the numbers of campervans increase.

“And the biggest impacts is it's not a defined campervan location. So there's the waste issue. And there's also the lack of parking for visitors that aren't in campervans as well. So it's quite a small carpark, actually as well.” (MI-03)



Figure 8.16: Campervans (left) and coaches (right) at Ring of Brodgar carpark, HES. June 2022 (author)

Another issue, related to so-called “wild camping³⁶” by campervans, is noted by a participant residing in the East Mainland, who expressed concern regarding

³⁶ Used in quotation marks here because by regulation wild camping does not include campervans, but many misinterpret it to “wild camping” in campervans, meaning not staying in an organised campsite.

improper behaviour, resulting in environmental damage, as well as effect on sense of place.

“...one of the beaches that I take my dog to has a nice sand dune system that's been completely trashed by campervans. You know, so there's a direct environmental impact of, partly, I think, through people's attitudes to what they think they should be allowed to do and partly because you see other people doing it: 'Oh it must be OK to do this here', to the extent where it's, you know, really degraded somewhere, that was really quite nice.” (MI-19)

The issues, associated with campervans were also observed in other destinations, such as Aotearoa New Zealand (Seeler and Lueck 2021), Australia (Caldicott, Scherrer and Jenkins 2014) and Scotland's Outer Hebrides (Niewiadomski and Mellon 2023), albeit to a greater extent than in Orkney.

8.2.3.4 Positive impact

Despite the awareness and concern regarding the environmental issues caused by tourism (or contributed to by tourism), one interview revealed a positive environmental impact visitors to Orkney make. Discussing the Orkney Native Wildlife Project, which aims to address the issue of invasive non-native stoats (Orkney Native Wildlife Project 2024) by employing community and visitors to record sightings of the animals across Orkney, one participant explained:

“I know from our point of view with the project, tourists, the tourists are really keen to get involved. They're really keen to help sight and report these sightings when they know about this. And so that kind of leads to ecological sustainability of the isles.” (MI-30)

In his role in the project, the participant engages with visitors when they are travelling around Orkney, including RSPB sites (partners in the project), and explains the project, its aims and reasons. This engagement leads to a positive effect on not only this project but the awareness and enthusiasm about the importance of wildlife protection.

“And again, that leads to donations and people being more enthused about wildlife and wanting them to take action to protect it and live more sustainably themselves.” (MI-30)

Interestingly, positive environmental impacts are rarely defined or discussed in the sustainable tourism development discipline, with limited mentions of such impacts in the context of protected areas (Belsoy, Korir and Yego 2012) and residents' perceptions (Smith et al. 2022). It is, therefore, important to acknowledge them in the Orkney case as well.

8.3 Conclusions

This chapter offered a discussion on residents' perceptions of tourism value, derived from their perception of tourism benefits and impacts in economic, social and environmental domains. It was demonstrated how these perceptions are driven by the residents' sense of place (Chapter 6), and their relationship with planned placemaking (Chapter 7). It was also demonstrated that the contested character of Orkney followed the discussion thus far, revealing differences in benefits and impacts perceptions, based on what is regarded as the most important to sustain (6.7).

It can be argued that the interpretive qualitative approach in this study revealed results that are distinct from the previous quantitative studies on residents' perceptions (4.3). It can be concluded that a strong and positive place image and identity (explored here as a part of the sense of place framework, Figure 4.1) does not guarantee positive perceptions of tourism value and stronger support for tourism development, as argued by other authors (Stylidis et al. 2014; Wang and Chen 2015; Wang and Xu 2015). On the contrary, it is revealed that a strong sense of place leads to a critical stance towards tourism development, which is viewed by some as a threat to the continuity of the place identity (Ujang 2012).

Moreover, some correlation with other studies was found in terms of sociodemographic factors, although these were not among the objectives of this study. It was indeed found that age plays some role in residents' perceptions, in line with Rasoolimanesh et al. (2015), however, not as a standalone demographic factor, but as a factor in the sense of place specifically among those who "remember when you had nobody, there were no tourists" (MI-10). Yet, the factor of 'nativeness' was found to be impactful, via its role in the sense of place (6.7), contradicting Rasoolimanesh et al. (2015), but supporting

Almeida-García et al. (2016). These differences in findings between many studies confirm that *understanding* the contextual setting of the destination was made possible by employing qualitative methodology, as argued by Deery, Jago and Fredline (2012) and Sharpley (2014). It helped to uncover *why* certain attributes of Orkney society, such as age or origin, affect residents' perceptions towards the value of tourism the way they do. This 'why' is rooted in the sense of place, affected by these attributes, constructing the layers of context (Figure 2.1). Consequently, understanding the perceptions enables the identification of what the residents want to sustain in their destination, informing the tourism strategic planning.

8.3.1 Tourism value

With this in mind, the summary of the tourism value can now be produced, which will inform the strategy evaluation framework in the next chapter. As expected, community members judge tourism according to their perception of its value, which is dependent on the benefits of tourism vs its negative impact, as perceived by that community (4.3.2). Moreover, in order to influence the perception of value, the benefits must be realised directly by the community, as opposed to being abstractly received in the public domain, without tangible outcome. Arguably, it is also applicable to impacts, where more tangibly felt negative impacts were driving the overall perception of value (such as, is there a direct disturbance by crowds and coaches or is it something that happens elsewhere and does not affect the daily lives directly). To meet sustainability needs of Orkney as a tourism destination, the tourism value must be recognised by its stakeholders in a way that creates a shared understanding of what this value is, and its determinants. This echoes an argument by Grenni, Soini and Horlings (2020 p.418), who call for creating a context-specific understanding of the sense of place and place values (here, value of tourism as a placemaking element) to inform placemaking decisions and "preferred pathways for [sustainability] transformation".

It can be seen from this chapter, that both the benefits and impacts of tourism received passionate accounts from the participants, and awareness of the issues, as well as acknowledgement of benefits, is clearly present in the Orkney community. However, the relationship between the benefits and costs of tourism

in Orkney is complex and prone to individual perception and subjectivity. Such complexity creates an immense challenge for strategy-makers in Orkney to develop and implement an appropriate approach, that will be able to address this complex reality, and indeed bring Orkney closer to being a sustainable destination.

CHAPTER 9

Strategy Evaluation Framework

In this final analytical chapter, the findings from Chapters 6-8 are reviewed to form the proposed Orkney Tourism Strategy Evaluation Framework, which will be then used to evaluate Orkney Tourism Strategy 2020-2030. The chapter will summarise the main findings so far, informing the development of the evaluation framework, that will subsequently be applied to the Strategy. It will then discuss the results of this evaluation in the context of literature and propose expansion of the Orkney Tourism Strategy Evaluation Framework to be methodologically applicable to other destinations and contexts. As a result of this expansion, the Place-based Strategy Evaluation Framework (PSEF) is introduced and its application to different contexts is discussed.

9.1 Developing the Orkney Strategy Evaluation Framework

Prior to discussing the construction of the Orkney Strategy Evaluation Framework, its graphical illustration is introduced (Figure 9.1), to provide visual reference to its structure, and to anchor the discussion that follows.

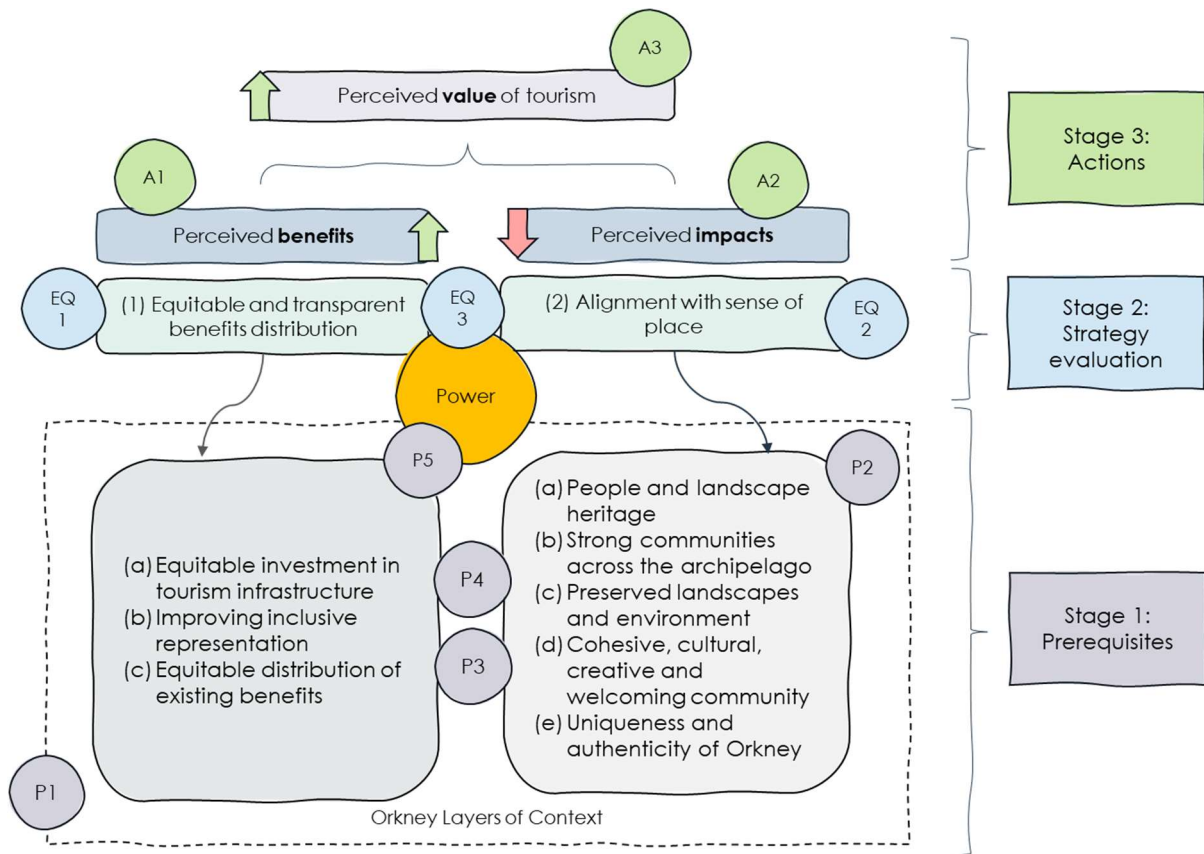


Figure 9.1: Orkney Strategy Evaluation Framework (author)

It can be seen from the above illustration, that the proposed framework consists of three stages - Prerequisites, Strategy Evaluation and Actions, in line with the conceptual framework, developed at the beginning of this study (Figure 5.1), where similar stages were developed to guide it in its data collection (5.4.1.3). As discussed in 5.7.3, the conceptual framework was adapted and transformed during the study, as a result of the findings and their inductive analysis.

9.1.1 Determining the prerequisites for strategy evaluation

In this first stage (**Stage 1 - Prerequisites**), the framework guides the analysis of the context of Orkney as a tourism destination, as was done in this study. The stage is divided into five steps (P1-P5), established in the preceding chapters of this thesis. In the **P1** step, the 'base' layers of the context of Orkney were analysed – rural, islands, archipelagos, cold-water – by means of a literature review, presented in Chapter 2. It was also supported by discussion in other literature review chapters, including insight into stakeholders and community, governance and strategy, as manifested in rural islands and archipelagos

(Chapter 3), and reference to this context in relation to place attachment and place branding (Chapter 4).

In Chapter 6 the unique layers of context in Orkney were analysed (step **P2**), by means of examining the relationship between the people of Orkney and Orkney as a place, framed into its geographical layers of context (rural cold-water archipelago, defined in **P1**). It was revealed that people in Orkney have a very strong sense of place, based on their place attachment and place identity, driven by specific attributes of Orkney. These attributes were positioned between two ends of a continuum – ‘Orkney as people’ and ‘Orkney as place’, whereby different community groups in Orkney could be placed between these ends according to what was recognised as the attributes of their sense of place (Figure 6.9). As was concluded in 6.7, place identity, in its place-centred (Hernández et al. 2007) and person-centred (Peng, Strijker and Wu 2020) sense, is a significant factor in what Orkney people perceive as the most important attributes of Orkney.

Moreover, despite the diversity of identities, there are attributes of Orkney that drive place attachment of its residents, related to Orkney community as a whole. This place attachment is a manifestation of the feelings of islandness in Orkney, experienced by its residents regardless of their origin (Conkling 2007). These findings revealed the plurality of elements contributing to the sense of place in Orkney, which adds to the often-contested ideas of what Orkney is and what it should be, affecting attitudes towards the strategic direction of its development. The contested nature of Orkney as a place, sensed by its people, was reflected in the discussions in Chapters 7-8, where the attitudes and perceptions of residents towards the value and sustainability of developments in Orkney were found to be driven by their alignment to the sense of place.

Discussion on placemaking was presented in Chapter 7, where tourism was reviewed as an element of Orkney placemaking. In this discussion, the attitudes of Orkney residents towards planned placemaking were examined, guided by the conceptual approach, offered by Lew (2017). This discussion contributed to the deeper understanding of the relationship between placemaking (developments) and sense of place, contributing to **P3-P4** steps of the framework. Rooted in alignment with the sense of place, the contested nature of Orkney was further

considered, with the need for development and growth (People end of continuum) juxtaposed against the need to preserve landscapes and environment (Place end of continuum). This was seen as a 'place dichotomy', manifested in the *double*-contested 'green brand' of Orkney, high-end place branding and iconic imagery usage, not sufficiently conveying the diversity of Orkney islands and communities.

As was concluded in 7.3, this contested nature is often reinforced by power, held by organisations, groups and individuals with the agency to make decisions and implement change, as well as distribute benefits from the placemaking activities, to increase their value in the eyes of the residents (**P5**). This conclusion supported the discussion in 2.4, where power in rural and archipelago places was seen as a binding concept, that underpins the relationships between people, places and institutions. Understanding the power component, and its influence on tourism value definition, is a key element of the strategy evaluation. This will enable recognising any power imbalances, affecting the exchange between residents, visitors and placemakers, thus leading to top-down placemaking, misrepresenting the values and not meeting the needs of local residents (7.3.2).

To develop the discussion further, Chapter 8 analysed residents' perceptions of visitors to Orkney, as a result of the placemaking activities. This led to an understanding of their perception of tourism value, which is seen as a proportionality between perceived benefits and costs (4.3.2), contributing further to steps **P3-P4**. It was concluded that ambiguity in benefits distribution (e.g. lack of transparency on reinvestment of OIC-earned harbour dues from cruise ships (8.2.1.2), or lack of investment in infrastructure on smaller islands (8.2.1.3)), which is affected by power (**P5**), underpins lower perception of tourism benefits, and subsequently higher perception of tourism impacts/costs. In addition, supporting findings in Chapter 7, it was demonstrated that the perception of benefits and costs is often driven by the alignment of tourism activities to the sense of place. Which elements are more profoundly affected by tourism, in the eyes of the residents, in both benefits and costs domains, will depend on what constructs their sense of place (Figure 6.9). For example, perceived positive contribution to the attributes of the sense of place via economic growth or population increase (for those nearer the People end of

continuum), or perceived negative contribution to the attributes of the sense of place, such as romanticisation of the islands (for those closer to the Place end). Therefore, alignment with the sense of place, and equitable and transparent benefits distribution, shape the perception of tourism value by Orkney residents, consequently their definition of what is sustainable for Orkney (6.1, 7.3).

To increase the perceived value of tourism, therefore, an increase in perceived benefits and reduction in perceived costs is needed (**Stage 3**). This is illustrated in Figure 9.1 by green arrows, indicating the 'increase' direction, and a red arrow, indicating the 'decrease/reduction' direction. Thus, the evaluation of the Strategy (**Stage 2**), must reveal whether the strategic direction it proposes is:

(1) supporting equitable and transparent benefits distribution. This will ensure existing benefits from tourism are known and understood by Orkney residents, and that any future benefits support all archipelago communities (8.2). Based on the discussion throughout the thesis, the practical aspects of this are rooted in the de-centralisation of Orkney placemaking processes, by addressing its archipelagic context. These aspects include:

- (a) equitable investment in tourism infrastructure, to enable visitors' dispersal and support communities to maintain their lifestyles with an increase of tourism (7.1.2).
- (b) improving the inclusive representation of Orkney as an archipelago and the diversity of its landscapes and communities in branding and marketing materials (7.2).
- (c) equitable benefits distribution across the archipelago; from larger communities in the Mainland to smaller communities in the most remote islands (Chapter 8).

Such de-centralisation will be possible if power (**P5**) is balanced (Ap 1992), with communities at the grassroots obtaining the agency to challenge the power of the main authorities (Codina, Lugosi and Bowen 2022). Moreover, the power, held by decision-making stakeholders in Orkney (most notably OIC), *can be* exercised to control the negative impacts of tourism in their destination and enable equitable benefits distribution, as noted by Ruhanen (2004) and in Saito and Ruhanen (2017).

(2) *aligned with the attributes of the sense of place*, as illustrated in Figure 6.9.

For the evaluation, these attributes can be summarised as:

- (a) People and landscape heritage
- (b) Strong communities across the archipelago
- (c) Preserved landscapes and environment
- (d) Cohesive, cultural, creative and welcoming community
- (e) Uniqueness and authenticity of Orkney

This can be done by increasing bottom-up placemaking, where involvement of local communities will ensure alignment of the placemaking to their sense of place, thus strengthening residents' perception of value of tourism as a placemaking activity, and stronger support for it (4.2). This also might mean balancing the 'binding' element of power (2.4), by giving agency to the stakeholders at the grassroots to contribute to decisions on the strategic direction.

9.1.2 Formulating the evaluation questions

Based on the need to increase the value of tourism, as illustrated in the Orkney Strategy Evaluation Framework in Figure 9.1, the evaluation will concentrate on determining to what extent the strategy addresses this need. This will be established by evaluating to what extent the two elements of value increase (increase in perceived benefits and decrease in perceived costs) are evident in the Orkney Tourism Strategy. To this end, the following questions must be asked:

(EQ1) Does the strategy address the need for equitable and transparent tourism benefits distribution?

According to the framework, this can be evidenced by addressing the issues, specified above in **(1)**.

(EQ2) Does the strategy address the need for the alignment of the strategic direction of tourism development with the sense of place of Orkney people?

This can be evidenced by aligning the objectives of the strategy and overall strategic direction to the sense of place attributes, specified above in **(2)**.

(EQ3) Whose value the chosen strategic direction reflects?

Following the review of the above elements, it is important to determine what drives the chosen strategic direction. This can be done by recognising whose value is represented in the strategy, determined by who benefits from it. Here it should be possible to recognise the power element (**P5**) and determine how it influences the sustainability narrative, conveyed by the Strategy, and how it will affect its implementation.

The three questions above constitute the evaluation framework, proposed in this study. These questions are tailored to the unique contextual setting of Orkney Islands, based on the Layers of Context (LoC) model, discussed in Chapter 2. In the following section, this framework is applied to Orkney Tourism Strategy 2020-2030, to determine its alignment to the sustainability needs, defined by Orkney residents (**Stage 3**). Following the application, actions to increase the benefits (**A1**) and reduce the impacts (**A2**), thus increasing the value (**A3**), can then be determined to be implemented in Orkney, to increase the value of tourism and therefore meet the place-based sustainability needs.

9.2 Evaluating Orkney Tourism Strategy 2020-2030

Orkney Tourism Strategy 2020-2030 (Destination Orkney partnership 2022a) was introduced in 1.3.6, where its main attributes were discussed. The following evaluation will consider these attributes of the Strategy, as well as the overall text of the document throughout its twenty pages. The process of evaluation was based on coding the Strategy document content into the codes (Figure 9.2), aligned with elements of Orkney Strategy Evaluation Framework (9.1), and presented here as a narrative, supported by quotes from the strategy document (Destination Orkney Partnership 2022a), and the participants³⁷.

³⁷ The participants reflected on the initial version of the strategy (Destination Orkney Partnership 2020), content of which, in these instances, aligned with the updated version, unless explicitly stated otherwise.

Evaluation		
Name	References	
EQ1. Benefits distribution (de-centralisation)	0	
(a) Infrastructure	2	
(b) Inclusive representation	18	
(c) Existing benefits distribution	10	
EQ2. Sense of place	0	
(a) People and landscape heritage	3	
(b) Strong communities across the archipel	6	
(c) Preserved landscapes and environment	9	
(d) Cohesive, cultural, creative and welcome	1	
(e) Uniqueness and authenticity of Orkney	4	
EQ3. Power	77	

Figure 9.2: Nvivo coding structure based on Orkney Strategy Evaluation Framework (author from NVivo)

9.2.1 Evaluation question 1

EQ1: Does the strategy address the need for equitable and transparent tourism benefits distribution?

Overall, the subject of the dispersal of visitors and benefits is present in the strategy, albeit not always explicit and could benefit from being supported by clear strategic goals in the Strategy document itself. Dispersal of benefits features in the Strategy’s objectives as “All communities benefit from tourism and visitors enjoy a broader experience”³⁸ (p.5,15), and the most explicit representation of the vision of dispersing to outer isles can be seen in this quote:

“Holidaymakers will consider visiting the inner and outer islands an essential part of their Orkney experience and find it easy and affordable to visit the island(s) of their choice.” (p.13)

Despite the acknowledgement, several issues were observed, that potentially can prevent this objective from being achieved. As illustrated in Figure 9.2

³⁸ Interestingly, in the initial version of the strategy (see 1.2.6), this objective read “Disperse the benefits of tourism throughout the whole of Orkney”, and it is unclear why such change was made.

above, the subject of benefits distribution was evaluated based on three criteria, established in 9.1: (a) equitable investment in tourism infrastructure; (b) improving inclusive representation; and (c) equitable distribution of existing benefits. As discussed in 9.1.1, these elements constitute the process of de-centralisation, which is explored below.

The subject of de-centralisation manifested in the acknowledgement that “a ‘cross-islands’ approach should be adopted” (p.5, 15), and that all decisions will be “informed by community and stakeholder engagement” (p.5, 15). The Strategy explicitly mentions community engagement once more, in addition to the quote above:

“The Orkney community will be involved in shaping the future of tourism and its delivery and will value tourism as a positive force that enhances their quality of life.” (p.13)

While this is acknowledged, further details could have been provided on how such engagement will be conducted, and what *community* means for Orkney. As discussed in 3.1.1, both aspects are important to ensure alignment of the strategy, as a placemaking element, to the residents’ sense of place, contributing to their support for the chosen strategic direction. Moreover, considering that the Strategy can be used as a place branding tool, the use of imagery does not sufficiently support the need to engage and secure buy-in from Orkney communities, since only one photograph out of twenty (Appendix 14) depicts a member of Orkney community. In addition, the ‘benefits to communities’ aspect was mentioned several times throughout the document, with only one mention of what these benefits might be: “growth generates income, creates jobs and encourages developments that can benefit the whole community”. This mention, along with others, that position benefits to communities alongside, or even after, benefits to visitors, is laden with power, which will be addressed in EQ3 (9.2.3).

Looking at the “cross-island” (p.5) element in more detail, the strategy does not sufficiently emphasise that Orkney is an archipelago, apart from the word ‘archipelago’ in the ‘strengths’ part of the SWOT analysis (p.18), and using the plural form of the word ‘islands’ in instances where it was mentioned. The strategy does not include a map of Orkney, to illustrate the archipelago context,

nor it includes any mention of the islands of Orkney by name. Moreover, out of twenty images, used in the strategy, only one is taken on Sanday (small footer photo), and three illustrate the most popular landmarks of interconnected isles – The Italian Chapel (twice) and the Churchill Barriers. Location of the remaining four photographs, depicting local wildlife, is unknown. Table 9.1 illustrates this analysis, and Appendix 14 includes the full list of photographs.

Location	Quantity	Percentage
Mainland	12	60%
Interlinked islands	3	15%
Unknown	4	20%
Other islands	1	5%
Total	20	100%

Table 9.1: Imagery locations' summary (author from Destination Orkney Partnership 2022a)

Such use of imagery, as was discussed in 7.2.1, can reflect the centralised approach of the strategy. Although the Mainland focus is not explicit, the implied message is recognisable, especially by those who might already have pre-conceived ideas of a centralised approach to development (the subject of intra-Orkney centralisation was brought up by participants from across Orkney, whereas the subject of centralisation on a national level was only mentioned by participants from the Mainland). As one participant noted:

“So I think people are really passionate and want things with an outward looking philosophy that are really keen for the, you know, the islands to be thriving and things to be happening locally. But it seems like beyond that things that are outside an individual or a small community’s control.” (MI-26)

As discussed, centralisation of decision-making can impede equitable benefits distribution. Tourism strategies, as argued by Lane (1994), are mechanisms to support tourism-related investment (1.1.3), and lack of equitable representation in such strategies can lead to inequitable investment in infrastructure, to support tourism development, dispersing the visitors and, therefore, benefits (Bardolet and Sheldon 2008; Baldacchino and Ferreira 2013).

The subject of infrastructure development (**a**) was noted in the strategy as one of the objectives, to “develop the tourism resource and infrastructure that meets current and future demand” (p.5,15). It was also noted as the need to develop “infrastructure and services necessary to accommodate that growth is achieved” (p.9), as well as aiming to develop “world-class infrastructure” (p.13), and balance between “maximising the opportunity of existing assets and infrastructure and the need to protect our natural and cultural heritage as well as Islanders’ quality of life” (p.19). However, all these objectives could have been stronger, if they were supported by the explicit mention of recognising the needs of outer islands in infrastructure development, as a basis for dispersal and benefits distribution, improving on the approach taken in STIDP (7.1.2.2). In addition, it would have been beneficial to ensure explicit recognition of the needs of the islanders themselves, and acknowledgement that there might be communities that do not want more visitors to their islands (8.2.1.3):

“So I know that the, some people on islands have felt a little bit like it's been kind of done, not on their behalf, but like it's kind of pushed without them actually really wanting more tourism.” (MI-19)

Despite the inconsistencies in how the dispersal of visitors and benefits will be realised, the Strategy includes the following statement:

“There is no shortage of things to see and do; the limitations are the physical size of Orkney, the size of its working population, and the ability of its visitor attractions to manage and local people to welcome increasing visitor numbers. To embrace growth there is a clear necessity to both temporally and geographically disperse visitors to less visited attractions and areas.” (p.19)

According to this statement, the dispersal of visitors is seen as a ‘panacea’ for all the negative impacts of tourism growth, however, as was argued in previous studies (see Thuesen 2022) and was opined by the participants in this thesis (8.2.1.3), dispersal remains a challenge. Despite that, growth in tourism remains at the forefront of this strategy, as will be discussed in the following sections.

Another topic must be mentioned here on the subject of benefits distribution. As discussed in 8.2.1, the distribution of the income from cruise calls (**c**) is seen as

one of the stumbling blocks to residents' support for this type of tourism. However, as it is one of the most topical discussions in the community, the Strategy could have addressed this issue more explicitly. 'Cruise' is noted in the document only three times, as a context and as an aspiration that cruise visitors will continue to arrive and be welcomed, and encouraged to return for another, longer, visit. Despite this acknowledgement, however, the Strategy does mention the issue, rooted in the 'dichotomy' between volume and independent visitors (8.1). It states that day visitors have a "potential to negatively impact not only the visitor experience, particularly of the independent traveller, but also at times, the day-to-day lives of local people" (p.9). It also notes the higher value of independent visitors, and the need to balance for the sake of "viability, quality and sustainability" (p.9).

The cruise sector brings to Orkney almost half of its visitors annually, as also acknowledged in the strategy (p.8), and yet the mention of its benefits and impacts is minimal. The strategy also omits one of the main issues with cruise, their dispersal away from the main sites, especially to the outer isles. While this may be implied in the overall dispersal narrative, this again evidences the centralised nature of the strategy and its weaker underpinning for tactical response to address the issues (such as infrastructure development).

9.2.2 Evaluation question 2

EQ2: *Does the strategy address the need for the alignment of the strategic direction of tourism development with the sense of place of Orkney people?*

As per the evaluation framework (9.1), the alignment with the sense of place can be evidenced by how the strategy refers to the attributes of the sense of place. Recognising that these attributes are varied (Chapter 6), the framework offers to evidence this by considering the elements: **(a)** people and landscape heritage; **(b)** strong communities across the archipelago; **(c)** preserved landscapes and environment; **(d)** cohesive, cultural, creative and welcoming community; and **(e)** uniqueness and authenticity of Orkney.

The subject of the environment **(c)** was noted several times in the strategy, some more explicit and practical, and some more abstract. It notes that "The strategy recognises that it is vital that we protect and conserve the integrity of

the Orkney environment and our local culture.”, setting “Mitigate climate change impacts of and on tourism” and “Responsibly manage visitor numbers to protect sites and improve the quality of experience for visitors and residents” as its objectives (p.5). The strategy also envisages that the visitors will enjoy the natural environment and be aware of its commitment towards sustainability. While there is no explicit definition of what such ‘environment’ entails (the word ‘landscape’ (c), for example, is mentioned twice and only in the context of tourism product), it is evident that more emphasis is put on the “sites of national and international importance” (p.9). Moreover, the words ‘nature’ and ‘natural’ are only used in conjunction with ‘heritage’ and ‘cultural’ environment (a), which can be interpreted as ‘landscape heritage’, discussed in 6.3.1.2.

From the point of view of environmental protection (c) as a means of alignment to the sense of place of those, valuing physical characteristics of Orkney, it is evident that an attempt at such alignment was made. However, there is more emphasis on visitor sites in the landscape (a), rather than landscape and nature *per se*. Moreover, the meaning of the ‘climate change mitigation’ objective is unclear, and there is no mention of the environmental impact of public transport and no reference to the impact of cruise ships on Orkney’s environment. Furthermore, there is no mention of the potential impact of tourism infrastructure development on the environment as well. In addition, promising that “active destination management will ensure that resources are protected” (p.12), the Strategy would have benefited from elaboration on what such management might entail, who will be responsible for it, and who was consulted to determine what those resources are.

The uniqueness and authenticity aspect (e) can be evaluated by reviewing it against the place branding elements of the strategy, such as the use of imagery, as well as written content. Visual representation is discussed above (9.2.1), where it was found that the use of iconic imagery is still prevalent, which might not align with the sense of place of those who reside elsewhere. Moreover, this might also not resonate with those who have these iconic attractions ‘in their backyard’ (8.2), since this may be perceived as a strategic objective to attract more visitors to these sites, and therefore cause even more sustainability issues.

The subject of the “universally-used brand” (p.13) was already discussed in 7.2.1, where its misalignment with the diversity of the Orkney archipelago was noted (**b, e**). Nonetheless, the Orkney brand was a notable element of the Strategy, stating that:

“Tourism helps support a compelling brand for the islands which creates opportunities for other sectors, notably crafts and food and drink but it is also critical in attracting investment and attracting talent.” (p.7)

This statement alludes to the value, assigned to tourism by those who contributed to developing the Strategy, and indicated the power dynamic at play, as will be discussed in 9.2.3.

In addition, the vision of Strategy (**e**) (9.4), particularly the “world class” (p.5) element, was reflected on by the participants. While many found it ambitious but relevant, some expressed concerns:

“That's the part I actually have the most problem with. We're not a world class destination, we're not New York, we're not Sydney, we're not. We're not. We are a small island group who should aspire to present ourselves in the best possible manner. To be a world class destination implies you've got the whole world to come here, and we don't. We need a very, a very select group of people who choose to be here.” (MI-25)

Another participant made the misalignment clear by reflecting what “world class” means for him:

“Something's not world class when there's lots and lots of people [...]. And for me, that [...] would be basically kind of making sure that the natural environment stays in a good condition.” (MI-19)

Yet, some attributes of the sense of place were more evident in the strategy. Stating that “Orkney’s food and drink, and the creativity of its people, will continue to be integral parts of the authentic Orkney experience.” (p.13), it aligns its aspirations to the sense of place attributes (**d**), mentioned by some participants, as creativity (6.5) and “extremely good food and drink” (MI-22), as noted in 7.2.2. Moreover, the mention of the festivals and events can also be seen as evidence of aligning strategic ambition to the sense of place, as was discussed in 7.1.3. In addition, and in alignment with the sense of place of some

residents, the strategy emphasises that “Cruise ships and other day visitors will continue to visit Orkney and should be welcomed”, and “Orkney will have an enviable reputation as an accessible and welcoming tourism destination which caters for every visitor” (p.13). This reinforces the welcoming character of the Orkney community (**d**), appreciating all visitors, regardless of their mode of getting to Orkney (6.5, 8.1).

The element of ‘strong communities’ (**b**) entails the resilience of the Orkney community, and its economic and demographic stability, and, especially for the native community, protection of its unique character (**e**) (all discussed in Chapter 6). As already noted, the strategy most evidently addresses economic sustainability, stating that “Tourism is a key component of Orkney’s economy and one which continues to grow in importance in terms of the creation of income and jobs in the islands” (p.5). The objective of the strategy, therefore, is to “Grow the prosperity of the islands through responsible tourism” (p.5, 15). Other economic and social aspects, that the Strategy promotes, are opportunities for young people, sustaining transport infrastructure and Orkney produce, and enriching cultural and social lives of its residents. While this aligns with the sense of place of many residents, particularly those at the ‘people’ end of the continuum (6.7), the distribution of these benefits could have been addressed more clearly. As discussed in 9.2.1, the Strategy could benefit from addressing the fact that these benefits can be realised only by those communities, that have the infrastructure, facilities and resources to welcome visitors, bringing those benefits. Those who do not might be negatively affected by the centralised tourism offer, experiencing disparity and disconnect, and losing residents who move to places with more opportunities (6.4).

9.2.3 Evaluation question 3

EQ3: *Whose value the chosen strategic direction reflects?*

Based on the discussion above, the Strategy emphasises growth in tourism and economic benefit as the main value of tourism, arguing that this is what will help to sustain the communities and their way of life. It aims “to develop its [tourism industry] potential to bring *sustainable benefits to visitors and businesses* in a way that improves the lives of our community” (p.17, emphasis added). Despite

this, the Strategy mentions concerns of uncontrolled growth and its damage to the environment and disturbance to the communities. However, this was seen as insufficient for some participants. In this context, three participants noted that the order of the objectives speaks loudly about the priorities and values that this strategy aims at:

“I always find it interesting, and it’s not, certainly not restricted to this document, but economic benefit is always put at the top. It feels to me like it’s, it’s just the first thing, I don’t know if it’s a subconscious thing. And then you’ve got some stuff in the middle and always at the bottom is ‘But whilst we’re doing this, we have to look after our environment.’” (MI-19)

Moreover, several mentions of the word ‘environment’ (9.2.2) attest to the need to protect it not for the sustainability of Orkney as a place (or wider sustainability principles), but for the sustainability of the tourism industry to Orkney. This can be seen from the SWOT analysis, presented in the strategy, which listed “Degradation of visitor attractions”, “Environmental impact of tourism” (without specifying what it is), and, most interestingly, “Climate change concerns – people may choose to travel less” (p.18), as threats to “tourism market” (p.19). Moreover, the Strategy mentions “renewable energy” as an indicator of being a “‘green’ destination”, “prioritising low carbon initiatives and minimising environmental impact” (p.13). As previously discussed, how this will be done in practice is not explicitly stated, which reinforces the concerns of those who are critical of the strategy. As discussed in 7.2.3, the ‘green’ brand of Orkney is contested by those for whom ‘green’ is in the natural unchanging landscape, which is threatened by the infrastructure-heavy renewable energy. It is also contested by the fact that tourism, especially to islands and archipelagos, is inherently not ‘green’, since it involves polluting transport, which the Strategy could have addressed more strongly.

But it is not only the environment, which, according to the Strategy, is required to ensure visitors are coming to Orkney. By 2030, the Strategy envisages “Our sense of community pride ensures that visitors enjoy their experience of Orkney.” (p.13). While for some this may simply mean that the strategy recognises that the Orkney community is proud, and is happy and willing to

showcase it to the visitors, to a critical eye this may mean that the community pride is being commodified for the benefit of the visitors (7.3.1).

It can be argued, therefore, that the Strategy prioritises the values of tourism businesses and those who represent, support and benefit for their success. This also means, however, that since many of Orkney's residents are involved in tourism, they might be inclined to support the strategy. Indeed, despite many concerns, expressed by some participants, twelve participants (over 40%) responded that they think that the strategy fits local community values. One participant remarked:

"So some parts of the community, yes, but it's not like the community here is not monolithic. So I think, for me, I definitely recognise that all of this and agree with it. And I think lots of people will. Absolutely. But not everybody will, not everybody thinks that there should be more tourists at all. You know, so, you know, it's very difficult to speak to the whole community." (MI-16)

This is because, as was noted elsewhere, benefits are perceived more strongly than negative impacts (Nunkoo and Ramkissoon 2011), thus creating a situation where while impacts are acknowledged, the support for the Strategy is still evident. However, those that do not or will not benefit from tourism growth, are more critical towards it. This, as discussed above, is most evident among those on the outer isles (6.4, 7.1.2, 9.2.1), those whose business relies on independent visitors (8.2) and those, whose sense of place is powered stronger by Orkney's nature and for whom 'green' and 'sustainable' means preservation of the environment (6.1, 9.2.2).

It can also be concluded, that despite the concerns of many residents regarding tourism development, as was seen throughout this thesis, the Strategy maintains the status quo, which is growth of tourism, without sufficiently addressing the challenges that such growth brings. Supporting this observation, one participant noted:

"So that's been ever since Orkney Tourist Board was formed. Whenever that was in the 70s, that's been one of the... The two main objectives were dispersal, I should say, and attracting people to come outside main holiday season." (MI-22)

Moreover, similar strategic objectives were proposed by the Orkney Tourism Board (currently Destination Orkney Limited) back in 1992, including “taking cognisance of social and environmental considerations which tourism may have on Orkney culture and the Orkney way of life” (Butler 1997 p.69).

This study, however, can help to explain the reasons behind this situation, which is rooted in the element of power, including power within the tourism industry governance (6.5.1.2). As already discussed, Destination Orkney Partnership, while uniting key organisations in Orkney, has limited power to implement the Strategy, despite the ambition, expressed in the Strategy:

“Through the DO partnership, industry will have a vital voice which will provide a barometer through which the partnership will know if the tourism strategy is working for Orkney and will be able to recognise success as well as gaps or areas for increasing action.” (p.13)

The main reason for this is the un-constituted nature of the DOP (MI-04), which is regarded as a “coalition of the willing” (MI-07). Therefore, the Partnership, as an entity, does not have the power and agency to act on the objectives, that were developed by them. As was explained by MI-31, this means that any implementation action (the Action Plan) must be approved and adopted by their respective organisations, since each organisation separately will have the responsibility to implement the actions in their remit.

Moreover, since not all partnering organisations have equal resources, and therefore, power to implement change, the majority of implementation actions will fall in the remit of more powerful organisations, namely OIC, HIE and VS (6.5.1.2). It can be argued that Destination Orkney Limited, which represents the tourism businesses and is regarded as a DMO, and thus possessing ‘legitimate’ power (Saito and Ruhanen 2017), does not have sufficient agency to progress with implementation, since they need a buy-in of more powerful organisations. This, consequently, causes delays and a lack of implementation progress, as in the case of STIDP (7.1.2.2). Moreover, mistrust was expressed regarding the council’s ability, or rather willingness to invest in infrastructure to help disperse visitors and benefits, as was discussed in 7.1.2. One participant remarked:

“You know, if it down to council then, probably not. The council has had an obsession for years, they've been receiving money from the oil industry and they have a huge sum squirrelled away in, well, it's various kind of funds or trusts scattered throughout the council. And this reserve funds for a rainy day, that's what they keep saying. So far, it hasn't rained.” (MI-11)

Such power imbalance also means that the negative impact of “unlimited growth in visitors” (p.9), to an extent acknowledged in the strategy, remains unaddressed. This is due to the significant economic benefit from cruise operations to one of the most powerful stakeholders in Orkney – OIC (8.3.1.2), as is also evident in other destinations (James, Olsen and Karlsdóttir 2020). This is reflected in the fact that the Strategy does not explicitly state its position on the benefits of cruise, only alluding to the need for a more controlled approach. As also discussed in 7.2.3, Orkney place branding and marketing, which is performed by HIE and VS, does not include cruise, since it contradicts Orkney’s ‘green brand’. Yet, the issues, associated with it are not sufficiently reflected in the strategy. This, yet again, demonstrates whose value the chosen strategic direction reflects, a value which is underpinned by economic benefit, despite the acknowledged social and environmental impacts.

9.2.4 Evaluation conclusions

Summarising the evaluation above, it was determined that the Strategy predominantly reflects the values of those, who benefit from growth in tourism numbers. The nature of these benefits is financial, which, as argued in the documents, also brings societal benefits to Orkney people. This finding supports several other tourism strategy evaluation studies (see Tribe and Paddison 2023; Ruhanen 2010; Dodds 2007). This also confirms the concern, frequently expressed in literature, that when the balance between economic, social and environmental benefits is sought, in a capitalist society, economic needs will prevail (Hunter 1997; Bramwell and Lane 2011; Hall 2011b; Higgins-Desbiolles 2011).

Moreover, prioritising the needs of visitors and tourism businesses alludes to the fact that the Strategy aims at the sustainability of *the tourism industry*, rather than the sustainability of Orkney as a destination and a place, confirming similar arguments in the literature (Butler 2018; Nowacki et al. 2018; Sharpley 2000).

It therefore misses an opportunity to use tourism as a tool for the sustainability of Orkney in general, as was suggested by several authors (Creaney and Niewiadomski 2016; McCool, Moisey and Nickerson 2001; Weaver 2005), and even emphasised in the Strategy, quoting Professor Harold Goodwin: “we either use tourism or we are used by it.” (p.6).

Orkney’s archipelago context is not seen as sufficiently reflected in the Strategy (9.2.2), missing a chance not only to gain support from wider Orkney communities but also capitalise on the diversity of its islands and contribute to the tourism product, which, as the Strategy argues, is currently limited by “the physical size of Orkney” (p.19). As Baldacchino and Ferreira (2013) observe, harnessing the archipelagic nature of a destination can diversify the experience, disperse visitors, increase the length of stay and distribute benefits – all the needs that are identified in the Strategy.

Admittedly, issues in tourism development in archipelagos are vast. These include complex governance, challenging stakeholder engagement, differences in stages of tourism area lifecycle between the islands, criticality of inter-island travel and balancing opinions of the communities regarding tourism development on their islands (Bardolet and Sheldon 2008; Baldacchino and Ferreira 2013). All these challenges were observed in Orkney as well, augmented by its local contextual situation. Yet, the challenges continue to exist, and the Strategy could have made a stronger contribution to addressing those.

The Strategy also does not provide sufficient evidence that its objectives and value it encompasses, are a result of extensive consultation and participation with a wide range of stakeholders, including local communities from across the archipelago. While it does mention “The strategy has drawn on a range of previous documents, partner strategies, and formal and informal consultations and discussions” (p.6), it does not elaborate on who contributed to these discussions and what those contributions were. This is except for a note that “Importantly it draws on a significant contribution from industry operators” (p.6), alluding again to whose value it represents, and therefore, whose *sustainability* it aims to support. As Albrecht (2017) explains, values of growth, productivity and competitiveness are often expected from an industry-driven strategy, which Orkney’s strategy evidently is.

Interestingly, in Orkney, the individual representatives on the DOP reside locally (6.5.1.2), and are therefore aware of the concerns regarding tourism, expressed in the community. While this awareness is evidently reflected in the Strategy, it is still found to be “politically weak” (Albrecht 2017 p.334). Moreover, despite a plethora of evidence that wide and comprehensive stakeholder engagement ensures sustainable strategic direction (Lane 1994; Simpson 2001), in Orkney knowledge of the social and environmental issues, caused or exacerbated by tourism growth, does not always translate into action, as was noted by several participants in this study (MI-01, MI-06, MI-14, MI-26, MI-28, MI-30). After all, strategic planning does not stop in producing a strategy document, it should encompass determining and implementing the strategic objectives (Phillips and Moutinho 2014). As was discussed in 9.2.3, implementation of the Strategy has halted at the stage of releasing its Action Plan, mainly due to the required commitment of the organisations with power and agency to the actions in their remit. This supports the point above, where even when the input of a wide range of stakeholders, including communities, is obtained, the decision on what to do with this information will ultimately belong to those with power, and depend on its alignment with their interests and values (Albrecht 2010).

In Orkney, it can be argued based on this study, that the local government tends to maintain the status quo, which ensures the economic benefits are realised. Of course, the importance of the economic benefit from tourism, especially when it contributes to Orkney’s public funds, cannot be underestimated. However, as argued by Ruhanen (2004) and observed in Saito and Ruhanen (2017), local government can exercise their power to control the negative impacts of tourism on their destination on a local level. Especially in rural landscapes, where it is vital to consider multiple realities and outcomes, not only those imagined by actors with power (Prince et al. 2023).

Moreover, limited explicit mention of the outer islands, and evidently centralised strategic direction, can be explained by power dynamics among its stakeholders. For example, endorsement of explicit objectives, aiming at investment in developing tourism infrastructure on Orkney’s outer isles would mean significant financial commitment by OIC. The discussion on STIDP provides evidence for this argument (7.1.2.2). While many agree with this approach, for others it

induces feelings of mistrust in the OIC, as was also argued by Gkoumas (2019) elsewhere, which creates some tensions within the Orkney community, contributing to its sustainability challenges.

With these takeaways in mind, the relationship between the Strategy and sustainability can be reviewed. Using Tribe and Paddison (2023) strategy typology (Table 3.2), the Strategy conforms to several principles of the 'traditional strategy', with vision and objectives, current state and the desired state outlined in its structure. To align with this type, it is expected to include methods and implementation plans, but the Strategy includes only a reference to the documents that have not yet been finalised. The Strategy also omits several principles of the 'mindful' strategy, as proposed by Tribe and Paddison (2023 p.3), which offers a "balanced approach to management", considering a wider environment, in which the strategy exists. While it mentions on several occasions its direction towards sustainable and responsible tourism, it could have more explicitly demonstrated the broader societal value beyond the narrow economic benefit. Consequently, the Strategy does not demonstrate its critical approach to tourism development and does not challenge the capitalist stance, as expected of the 'Marxist' strategy (Tribe and Paddison 2023). While radical capitalism critique was by no means expected from the Strategy, the fact that it does not conform fully to any of these types raises a question of its usefulness in general. This echoes Albrecht (2010), who questions the usefulness of strategy documents and observes in her study that strategy implementation was shaped by skills, interests, values and various strategic views of involved stakeholders, regardless of what the formal strategy document defined. On a similar note, Ruhanen (2010 p. 58) asks "where's the strategy in tourism strategic planning?", meaning to find out whether the plans that destinations are developing are indeed strategic long-term approaches to sustainable development.

Ruhanen (2004) evaluates seventy local tourism strategies in Australia and confirms that long-term strategic planning was not evident in any of the documents, confirming that integrating sustainability principles into tourism strategies is challenging (Soteriou and Coccossis 2010). This was confirmed using the evaluation tool, developed by Simpson (2001) (3.3), which was the

basis of the conceptual framework for the present study (5.3). Simão and Maria (2012) in their review of tourism strategies, using the same tool, also confirm that the plans only include a 'weak' sustainability narrative, without elaborating on its meaning and implementation. Thus, to be truly a "world-class sustainable destination" (p.5), Orkney tourism governance powerholders must ensure the needs of Orkney communities are not only recognised but also acted on. This, in turn, will ensure alignment of the development to the sense of place of Orkney people, by reducing its impacts and increasing its benefits, thus increasing the tourism value for the local communities. Consequently, this will help meet their sustainability needs in the tourism context, and tourism indeed can become a tool for sustainability transition.

9.3 Applying the framework beyond Orkney

It can be learnt from the evaluation of Orkney Tourism Strategy above, that the proposed Framework provides a useful tool for systematic strategy evaluation. The conducted evaluation is value-driven and underpinned by place-based understanding of local issues, residents' perceptions and contextual circumstances of Orkney Islands. While this strategy evaluation framework is tailored to the specific Orkney context, its successful application can become evidence of its usefulness as a method to evaluate existing and developing strategies in other destinations and contexts. To apply to other contexts, however, the framework must be expanded to translate the methodology, used in the present Orkney case study, into practical steps. This section, therefore, fulfils the *pragmatic* element of this study (5.1.2), by providing a Place-based Strategy Evaluation Framework (PSEF)³⁹, as a practical tool to help solve a real-world problem, addressing OBJ5 (1.4)

To widen its application beyond Orkney, the three stages – Prerequisites, Strategy Evaluation and Actions – are adapted to include methodological guidance, that can assist the users of the Framework in its application. The resulting PSEF tool is presented in Appendix 15. The Appendix consists of three

³⁹ Hereafter it is referred to as PSEF or 'the Framework', unless a full name is used.

pages, where the Framework overview is presented on the first page, Stage 1 is exhibited on page two, and the remaining stages are included on page three.

9.3.1 Stage 1 - Prerequisites

To be relevant to other places, the Framework guides its users to determine the applicable layers of context of *their* destination, including the unique layer, formed by the interaction between the place and its people, as was done in this Orkney case study. Five enquiries are proposed in this stage (Appendix 15, p.2), that will guide the user to collect the relevant data (P1-P5), including methods for collecting the information for each element. It is important to note here, that the Framework does not instruct the user to follow the exact same data collection methods, used in this study, apart from encouraging to employ qualitative methodology, to create a descriptive place meaning, recognise variations between and within communities in the place (Masterson et al. (2017).

For example, it proposes to conduct SWOT or PESTEL analysis, in conjunction with the Layers of Context model, which was not done here. Furthermore, focus groups might be a useful tool to understand the sense of place and residents' perceptions of tourism value, which was not done in the Orkney study. In addition, a variety of participatory methods can be used to understand the sense of place and value, such as Public Participation Geographic Information System (PPGIS) (Nikula et al. 2020; Plieninger et al. 2018), deep mapping approach (Bailey and Biggs 2012) and appreciative enquiry (Horlings 2015), which were not explored in this study, but can become useful tools for destinations. This will ensure different destinations with different needs and resources can employ the most appropriate methods, where the Framework is used to guide *what* data to collect, and less *how* to do it.

Understanding the layers of context (P1) and the sense of place (P2) will then determine the practical aspects that affect benefits (P3) and impacts (P4), as uniquely exhibited in each destination. In this stage, the Framework also offers to analyse the power element (P5), as manifested in the destination, and determine its effect on the value that the strategy aims to provide, and the

challenges that the power distribution can lead to, as was seen in Orkney case study (9.2).

9.3.2 Stage 2 – Strategy evaluation

In Stage 2 the strategy evaluation takes place, guided by the same Evaluation Questions (EQ), used for the Orkney case study (9.2). Each EQ is mapped on the PSEF tool (Appendix 15, p.1) and includes relevant questions to ask during the evaluation (Appendix 15, p.3). This will determine whether the evaluated strategy addresses the main themes, identified in the Framework, based on the Orkney study. These include equitable and transparent benefits distribution, and alignment of the strategic objectives to the sense of place, as was identified in Stage 1 above. As was discussed throughout this study, residents' perception of benefits and impacts of tourism drives their support for the development (Ap 1992; Rasoolimanesh et al. 2015), and thus the strategy. This perception, however, is not only driven by the receipt of tangible financial benefits but by the degree of the alignment of the development to the sense of place, to understand the wider tourism value for the local communities (Grenni, Soini and Horlings 2020). The Framework, therefore, guides its users to reach an understanding of these elements, which will inform the actions for strategy update or development.

9.3.3 Stage 3 - Actions

Since the findings from performing Stage 1 and Stage 2 of the Framework will be different in each destination, the Framework cannot provide specific guidance for strategy development or update. It can, however, offer a generic guidance, based on the wider literature and supported by Orkney case study findings. For example, the Orkney case study showed that transparency in benefits distribution was deemed a key aspect of residents' perception of benefits (8.2). While the definition of benefits themselves and their perception cannot be generalised, and the current level of transparency in each destination cannot be assumed, the Framework guides the user to ensure the subject of transparency is looked at, as applicable to the specific circumstances.

Similarly, the Framework encourages the user to consider the diversity of needs in different communities across the destination, which is especially relevant to

other archipelago destinations (Baldacchino 2015a). Lastly, the Framework guides the user to address the power dynamic imbalance, should it be found in the destination. After all, this and previous studies have confirmed that many strategies exhibit an imbalance in power, leading to them meeting the narrower needs and values of those with power to influence the strategic direction (Tribe and Paddison 2023). More so in archipelago destinations, where power imbalance is often exacerbated by the relationships between the islands themselves, in addition to their mainland (2.2.2). To address potential power imbalance, the Framework guides the user to increase wider participation of the community members in decision-making, providing an opportunity for more bottom-up placemaking (Lew 2017) and placemaking that is aligned with residents' sense of place (Campelo et al. 2013; Lecompte et al. 2017; Lewicka 2008).

9.4 Conclusions

The purpose of this chapter was to bring together the findings from the preceding analytical Chapters 8-6 and form a strategy evaluation framework (OBJ3). The Orkney Strategy Evaluation Framework was then introduced, relevant to the Orkney context and applied to the Orkney Tourism Strategy 2020-2030 (OBJ4). Based on this evaluation, the Orkney Strategy Evaluation Framework was able to analyse the Strategy against the elements of the framework and recognise challenges that limit tourism to become a tool for Orkney's sustainable development. In contrast to the existing evaluation frameworks, that can recognise misalignment with general sustainability principles (such as Simpson 2001; Ruhanen 2004; Global Sustainable Tourism Council 2019), the present strategy evaluation illuminated *why* there is misalignment, and helped to determine *how* to improve the situation in a place-based, value-oriented approach (Horlings 2015). To answer these questions, this evaluation framework showed that the sustainability narrative can be reflected in the alignment of the strategy with the sense of place of the local people, and with the value assigned by them to tourism development. Ultimately, this determined whether the strategy meets the sustainability needs, as defined by Orkney residents, as was discussed in detail in 9.2.4.

The successful application of the framework to the Orkney case led to the expansion of the Orkney-specific framework to the Place-based Strategy Evaluation Framework (PSEF), which can be applied to other destinations. The PSEF tool offers methodological guidance for establishing contextual circumstances of the destination, that are place-based and value-orientated, with people and their sense of place at the core of this methodology. The Framework, therefore, provides a practical solution to help solve a real-world problem of place-based sustainability transition, in line with the pragmatic stance of this enquiry. The following final chapter provides a concluding discussion of the findings and their contribution to wider theory and practice.

CHAPTER 10

Discussion and Conclusions

In this final chapter, the findings of this study, presented in Chapters 6-9, will be reviewed against its aim and objectives. The chapter will proceed to establish the contribution of this enquiry to knowledge and practice, by discussing the findings against extant literature and developing an argument for their practical implications for Orkney and beyond. It will conclude by reflecting on the limitations of this case study and recommendations for further research on the subject of place-based sustainable tourism strategy.

10.1 Answering the research questions

As discussed in 1.4, the aim of this study was: (1) to propose a method for understanding the local contextual circumstances and their effect on tourism-related sustainability needs; and (2) to propose a place-based strategy evaluation framework, that can recognise whether tourism strategy addresses these context-specific sustainability needs of a local destination. The study, therefore, has set out to answer the three research questions, guided by five research objectives, as detailed in 1.3-1.4.

During the study, the local contextual circumstances, that affect the Orkney-specific definition of sustainability in the tourism context, were established,

answering the first research question (RQ1) and meeting objectives (OBJ1) and (OBJ2). To this end, the study employed the Layers of Context model (LoC), whereby the 'base' layers of rural, island, archipelago and cold-water were explored, by reviewing pertinent literature on these layers (Chapter 2). These layers were referred to in reviewing other pertinent literature on stakeholders, governance and strategy (Chapter 3) and on place and residents' perceptions (Chapter 4). The unique layer of context, Orkney Islands, was established during the empirical stage of the study, by inductive qualitative examination of the people-place relationship in Orkney (Chapters 6-8). By establishing the unique contextual setting, it was concluded that indeed it has a profound effect on the local meaning of sustainability.

It was revealed that sustainability is regarded by Orkney people according to their sense of place, whereby developments that are aligned with the sense of place will more likely be deemed sustainable, than those that do not align with it (Chapters 6-8, 9.1). This place-based sustainability meaning, in turn, drives the perceptions of tourism value, as a function of perceived benefits and costs, leading to residents' attitudes towards tourism strategy and their support for it. As was discussed throughout the analytical chapters, the sustainability definition, the sense of place and the perception of tourism value are not homogeneous but contested, creating a significant challenge for strategic planning.

The study then answered the second research question (RQ2), establishing the way such place-based meaning of sustainability can underpin a local strategy evaluation tool. To this end, Orkney Strategy Evaluation Framework was proposed (OBJ3) and applied to Orkney Tourism Strategy 2020-2030 (OBJ4), confirming its usefulness in determining the strategy's suitability for sustainable tourism development in the destination (9.2), answering (RQ3). Moreover, practical application of the framework to wider contexts was proposed (9.3), expanding the framework to the Place-based Strategy Evaluation Framework (PSEF), meeting (OBJ5). A discussion of these findings in relation to their contribution towards theory and practice is presented next.

10.2 Discussing theoretical contribution

Theoretically, this work makes its contribution to the subject of sustainability transition (Niewiadomski and Mellon 2023), by taking a place-based approach, addressing limitations of one-size-fits-all sustainability indicators and sustainability implementation approaches as was observed in the literature, such as Qiu et al. (2019), Heikkinen, Rastad Bjørst and Pashkevich (2020) and Pasgaard et al. (2021). These limitations led to the need for solutions on a local, context-dependent basis, and the present study contributed to addressing this need.

10.2.1 Layers of Context model

This contribution begins with the development and application of the Layers of Context model (Chapter 2), which was used to underpin the theoretical and empirical study of contextual circumstances, applicable to the Orkney Islands. This model (Figure 2.1), systematises the study of context, applicable to the case, by considering common layers of context (rural cold-water archipelago) through literature review and Orkney's unique layer of context via empirical study (Chapters 6-8). By systematically approaching such a review, it allowed for an in-depth understanding of these circumstances, and how they may affect the sustainability needs of Orkney as a tourism destination. By applying the 'base' layers of context (rural, island, archipelago, cold-water), the study was able to demonstrate that some aspects of tourism development and sustainability in Orkney are similar to other rural, cold-water island and archipelago destinations. However, it also demonstrated that some of these aspects manifested differently when looking through the unique layer of context, Orkney Islands. As such, many aspects revealed here were not observed in other studies, in destinations with similar 'base' layers of context, in line with arguments by Renfors (2021) and Campelo et al. (2013). This confirmed the importance of understanding the last layer, which, in Orkney's case, showed that the plurality of attributes that form the residents' sense of place leads to the contested perception of tourism value and sustainability, which tourism strategy should have addressed. Therefore, the layers of context model, proposed in this study, provides a useful pathway for determining the contextual environment for the sustainable development of tourism. While this provides a significant

practical contribution (10.4.2), the model can be used in other studies, where an understanding of the local context is needed, especially in further research on sustainability transition.

It is also worth noting, that while traditional business frameworks, such as SWOT and PESTEL⁴⁰, are widely used in determining internal and external factors that affect development, the Layers of Context model provides a stronger opportunity to establish the contextual circumstances. This is because it offers a lens for understanding the *inner* dimension of sustainability (Grenni, Soini and Horlings 2020), where the sense of place and value perceptions are examined in addition to the external factors, such as geography, economic circumstances or legal prerequisites. Thus, the contextual evaluation extends beyond factors affecting industry or product development, to an understanding of how this development is (or will) affect the people and the place, and therefore their sustainability. As noted in 9.3, however, the models can be partially or wholly applied in conjunction with the LoC model, where each layer can undergo an extensive analysis of what strengths, weaknesses, opportunities and threats it brings to the destination.

10.2.2 Tourism strategy evaluation

Consequently, the study makes a significant contribution to the field of sustainable tourism strategy. As was observed in Chapter 3, studies specifically addressing strategy-making and evaluation in island and archipelago destinations, with these layers of context explicitly contributing to the evaluation framework, were not found. This work, therefore, addresses this gap and offers a contribution to strategic planning for sustainable tourism in this complex environment. To this end, it provides an addition to the existing strategy evaluation frameworks (Simpson 2001; Lusticky, Bina and Musil 2015; Global Sustainable Tourism Council 2019), by offering a place-based value-centred strategy evaluation framework - PSEF. The Framework enables recognising and understanding these unique circumstances and their effect on sustainability

⁴⁰ SWOT – Strengths, Weaknesses, Opportunities and Threats; PESTEL – Political, Economic, Social, Technological, Environmental.

needs, as well as providing a pathway to increase the value of tourism development in the destination.

10.2.3 Sense of place and value relationship

Beyond strategy, the study contributed to the fields of sustainable tourism and place theory. By using the concept of sense of place to understand Orkney residents' views on the sustainability of their destination and their perception of the value of tourism to Orkney, this study adds to the existing knowledge of the relationship between place, value, sustainability and tourism development. This also addresses the call by Horlings (2015) for more empirical value-centred place-based research, that can explain motivations and drivers for people's perceptions of placemaking or place-shaping processes, contributing to place-based strategic planning and sustainable development. The present study expands on Horling's (2015) conceptualisation of relationships between place, value and sustainability, by offering a place-based value-orientated framework, which can be both operationalised and theoretically expanded. It applies these conceptual relationships to the tourism discipline, and the subject of strategic planning, in a real-life context, confirming the validity of such relationships and their significance for sustainable development. Moreover, this study expands the currently limited body of knowledge on place-value-sustainability relationships (Grenni, Soini and Horlings 2020; Horlings 2015) by extending this connection to mixed and intangible placemaking (Lew 2017), beyond the tangible manifestation of placemaking processes. Here it is applied to tourism development, which is seen as a placemaking element (Chapter 7) and is found to be a useful framework for understanding sustainability on a local level.

10.2.4 Power as a binding concept

By studying the place-value-sustainability relationship in the Orkney tourism context, this study also contributes to the knowledge about the contested nature of these elements, expanding on work by Chapin and Knapp (2015) and observations by Horlings (2015). The present study demonstrated how contested senses of place, contested meanings of sustainability and contested perceptions of tourism value, with its benefits and impacts, can manifest in a small community, living in a complex geographical, economic, social and political

environment. The results of this study illustrated the *place dichotomy* (7.3.1), fuelled by power dynamics between stakeholders, leading to the contested residents' perceptions of placemaking elements in Orkney, including tourism development. Power, therefore, was found to be a key component of the sustainability transition in Orkney, confirming arguments found in the literature (such as Codina, Lugosi and Bowen 2022; Lecompte et al. 2017; Klijn, Eshuis and Braun 2012). Orkney's strategy evaluation (Chapter 9) has also supported the argument by Tribe and Paddison (2023), whereby those with power can underpin the strategic planning with their ideology, in which case the strategy will be more profoundly aligned with their needs and interests. The importance of the Orkney case study in this regard is that it illuminated the reasons for such a contest, rooted in the diversity of people and backgrounds, the archipelagic nature of Orkney islands and their communities, as well as complex power structures between and within the islands (Stratford et al. 2011; Favole and Giordana 2018; Pugh 2018). It can be argued, that by understanding the contested milieu of the destination, actions can then be taken to identify shared values and shared meanings of sustainability, to support sustainability transformation, as was called for by (Chapin and Knapp 2015).

10.2.5 Transferability to other contexts

Although case study findings are pertinent to the studied case, and not statistically transferrable (Yin 2018), the method of developing and applying the framework can be a useful tool for other destinations. Section 9.3 provided practical steps for the framework application to other destinations, but this also has a theoretical merit. First, it provides an opportunity to test and refine the framework in further studies, applying it to destinations in similar contexts, as well as testing its applicability in other contexts (e.g. warm-water islands, destinations in developing countries or urban destinations). Second, by building on this study, there is an opportunity to create a pragmatic in-depth body of place-based knowledge, that uses the concept of value to underpin the sustainability transition.

While this study emphasises local context as a necessary lens for sustainability transition, Chapin and Knapp (2015) argue that understanding of sense of place and its relationship with sustainability can also be explored on regional and

national levels. The framework, proposed in this study, can provide a building block for such enquiries. Moreover, it can be argued that it can be used beyond tourism, and applied to other placemaking processes, that affect local communities, such as economic development activities (e.g. renewable energy), housing and transport development, education and health and social care. Practical implications of this will be discussed below, but theoretically, this can provide a significant opportunity to expand on the relationships between value, place and sustainability in a variety of contexts.

10.2.6 Islands and islandness

Beyond tourism, this study contributed to the body of knowledge on islands and islandness. As explored in Chapter 2, islandness creates a strong sense of community and belonging (Ronström 2011), which is fostered in both native and incoming residents (Conkling 2007), and this study illustrated how it manifests in Orkney. Addressing concerns, voiced by Grydehøj (2017 p.8), however, this study did not assume that attributes of islandness, observed in other island locations, can automatically apply to Orkney, in “an epic feat of deduction”. Instead, Orkney’s version of islandness was illustrated by the attributes of the sense of place of its residents, as already argued above, revealing that while some attributes are indeed common, others manifest uniquely (examined through the LoC model). As argued by Campelo et al. (2013), it is the permutations of these attributes and their effect on the sense of place, of the most importance. This study, therefore, was able to identify these permutations (Figure 6.9) and illustrate how they impact tourism strategy, as discussed in 9.1.

10.2.7 Archipelago studies

In addition, the study contributes to the field of archipelago research, answering Stratford et al. (2011), Favole and Giordana (2018) and Pugh (2018). It brings to the fore the complexity of the relationship between the islands of the archipelago, as opposed to their relationship with their respective mainland (Stratford et al. 2011). To this end, the present study listened to the voices of people from Orkney’s islands, which contributed to the understanding of the sustainability needs across the archipelago and their reflection in the Strategy. It contributes to the field of archipelago studies by illuminating the complexities of

tourism development and sustainability transition in the rural cold-water archipelago context, which remains limited (Renfors 2021).

These complexities go beyond transport connectivity and place branding processes, dominating previous archipelago studies (see Baldacchino 2015a). As the present study showed, they also include centralisation and power dynamics in and between the islands of the archipelago, relationship between variety of community groups, attributes of their sense of place and contested meanings of sustainability, as well as perceptions of value of development activities, such as tourism (Chapters 6-8). Thus, this contribution to archipelago knowledge provides a springboard for further enquiries on sustainability transition and sense of place by using a value-centred approach in the archipelago context.

10.3 Discussing practical contribution

In line with its pragmatic philosophical stance (5.1), this study's contribution includes a practical solution to a real-world problem, where creating actionable knowledge enables one to apply it to practice.

10.3.1 Orkney Tourism Strategy evaluation

This study provides significant value to the Orkney community, which is facing pressing issues and challenges in their sustainable development, in tourism and beyond. The practical contribution to Orkney begins with the results of the Strategy evaluation, conducted here using the proposed Orkney Strategy Evaluation Framework (9.1). The results can now be used to revise not only the Strategy itself but also the approach to its implementation (using Stage 3 of the Framework). The issues, highlighted in the evaluation, can now be looked at by Orkney tourism governance, to identify a path for their solutions. While the lack of an action plan for the Strategy implementation was highlighted as its limitation, it can also be seen as an opportunity to review its draft against the findings of this study and make relevant adaptations. Based on the evaluation, these adaptations might include explicitly widening the scope of the strategy beyond the Mainland to Orkney's outer isles, clearly stating how it can support many Orkney communities in meeting their sustainability needs in the tourism context. It can also clarify what benefits the chosen strategic direction can bring to all Orkney communities, explicitly highlighting the diversity of needs and

circumstances across the archipelago. Moreover, it can shift its narrative from benefiting businesses and visitors to benefiting the whole of Orkney, and indeed how tourism can be used as a tool to not only support the islands economically but provide a wider value, as defined by their communities.

10.3.2 Future strategies development in Orkney

In addition to the existing Strategy, the study offers a practical framework for the subsequent tourism strategy development in Orkney, supporting its efforts in reaching sustainable tourism development. The framework enables an understanding of Orkney-specific sustainability needs, their contested nature and the reasons for it. In line with Chapin and Knapp (2015), by recognising drivers and manifestations of contested elements, a plan of action can be developed to find common ground for sustainability implementation. While such a process will inevitably be accompanied by challenges, understanding the complex contested nature of Orkney can be seen as a first step to overcoming them. The results from the current evaluation can provide invaluable lessons learnt for the subsequent strategy development, whereby it considers the sense of place and value, assigned to tourism by Orkney's diverse communities, from the beginning of the process. This process will also consider existing power dynamics within Orkney, and consciously distribute power more equitably among the variety of stakeholders, allowing for bottom-up value-centred strategic planning. Moreover, since the present study has already determined Stage 1 and Stage 2 elements for Orkney, the PSEF tool (Appendix 15) offers Stage 3 guidance to improve the current Strategy and to be used to develop subsequent strategies, to ensure the transition to sustainability in tourism.

The proposed framework also contributes practically beyond tourism strategy. It offers a useful lens for decision-makers in Orkney to consider what sustainability means for a wide range of stakeholders, based on the results of this study. This can be useful for other sustainability-centred strategies, such as transport development, housing or renewable energy developments, as was touched on in the present study (7.1.1). Notably, this framework helps understand what underpins residents' perceptions of the value of infrastructure-heavy developments, such as Scapa Deep Water Quay or commercial wind farms, and why. Consequently, it leads to understanding what can be done to increase the

perceived value of these developments, thus strengthening residents' support. The framework can also be applied to the upcoming mixed and intangible placemaking initiatives, such as the Orkney 2025 Island Games, where residents' support is a significant construct of their success. Ultimately, as was seen throughout this thesis, residents' support is a fundamental part of any development, if it aspires to contribute to the sustainability of the place and its communities.

10.3.3 Strategic planning in other destinations

The practical contribution of this study extends beyond Orkney. The proposed Place-based Strategy Evaluation Framework (PSEF) (9.3) can be used not only as an evaluation tool of an existing strategy but also as a guide to strategy development in the first place. In this instance, learning and understanding the layers of context of the destination, including the unique layer, reflected in the sense of place, must take place before deciding on a strategic direction. This will enable a shared understanding of what sustainability means specifically for the destination (McCool, Moisey and Nickerson 2001; Albrecht et al. 2021), and therefore, what the value of tourism is as a tool to implement this sustainability vision. The stages and steps, proposed in the Framework, can provide useful guidance for destinations, seeking to develop a strategy that will guide the destination in their sustainability transition in tourism. This includes Stage 2, which can be applied to draft strategies, or guide the writing process of a new strategy document.

While it will be useful to test this framework in destinations in different contexts, as discussed in 10.5, its particular value is for other cold-water archipelago destinations. This is because the 'base' layers of context, analysed here, offer a ready-made foundation for analysing the 'last' layer of context, specific to the destination. Similar to Orkney, other destinations can also apply this framework to evaluate and develop strategies beyond tourism and to ensure any development initiatives are indeed valuable for the communities. Other cold-water archipelago places can capitalise on the results of this Orkney case study, and subsequently contribute to the collective understanding of the diversity of sustainability needs across cold-water islands and archipelagos.

Such diversity is evident by contrasting the present study to the enquiry conducted by Niewiadomski and Mellon (2023), who investigated tourism-related sustainability transition in Outer Hebrides – another rural cold-water archipelago in Scotland. It confirms that although similar layers of context apply to both archipelagos, and many of the external factors are common (such as both are governed by local authorities within Scotland), the last layer of context (Figure 2.1) of each is unique. Indeed, many of the issues found in the Orkney study were also noted in the Outer Hebrides, such as some common infrastructure issues (e.g. ageing ferry fleet), centralised top-down decision-making by the Scottish Government and perceptions of tourism benefits disparity between those who financially benefit and those who do not (Niewiadomski and Mellon 2023).

Yet, the authors found that the tourism stakeholders “share the same pro-sustainability values” (Niewiadomski and Mellon 2023 p.18), which was not evident in the Orkney study, where contested meaning of sustainability, sense of place and tourism value were observed. While some of the contrast between the results of the two studies can be attributed to differences in study objectives and methods of data collection, it is still clear that a one-size-fits-all approach to sustainable development, especially in tourism, is not a solution. Different tourism governance structures, power dynamics between stakeholders, different tourism products and levels of reliance on the tourism industry – all contributed to the distinct place-dependent sustainability needs in both archipelagos, located so close to each other. The comparison between these two studies has significant policy implications, in addition to contribution to the theoretical and practical knowledge. These differences illustrate the need for a place-based approach to sustainable development on a policy level, devolving the definition of sustainability needs to local destinations, while providing holistic and contextually appropriate political and financial support by the main powerholders in local and central governments to address these localised needs.

10.4 Discussing methodological contribution

10.4.1 Pragmatism and interpretivism

Methodologically, this study contributes to research driven by pragmatism and interpretivism, which was not found in tourism research. Supported by Goldkuhl (2012), the present study adopts pragmatism as its main ontological position, while borrowing elements of interpretivism. Moreover, pragmatism in solely qualitative study is limited in tourism research, usually applied to mixed methods, therefore, its combination with interpretivism allowed to enrich the understanding of the studied topic. This enrichment was reflected in the ability of the researcher to interpret, and therefore, understand the rich accounts, obtained via interviews (Veal 2017). Since the main narrative of this study was guided by the need to understand a variety of contextual circumstances and plurality of worldviews, interpretivism provided a solid ground for the researcher to do it. Pragmatism, in addition, allowed the researcher to use the acquired knowledge and understanding, and provide a practical solution (PSEF) to the real-world problem (Johnson and Onwuegbuzie 2004).

10.4.2 Qualitative interpretive methodology

Furthermore, approaching studying residents' perceptions of tourism value using qualitative methods, addressed the need to dilute the ocean of quantitative studies and contribute to explaining not only what drives these perceptions, but also *why* (Sharpley 2014; Deery, Jago and Fredline 2012). In contrast to the previous studies, reviewed in Chapter 4, the present qualitative interpretive study allowed the researcher to determine the reasons for the perception of tourism value and its benefits and impacts in Orkney (i.e. alignment with the sense of place, as well as what drives the sense of place). As emphasised previously, although the findings of this qualitative enquiry are pertinent to Orkney's unique contextual circumstances, the study provides evidence that an interpretive qualitative approach is beneficial for such enquiries and can be used in other contexts to understand residents' perceptions not only of tourism but other placemaking processes.

10.4.3 Application of digital ethnography methods

This study contributes to the contemporary qualitative research in applying elements of the digital ethnography approach (Pink et al. 2016). The main innovative contribution of this study is its photographic element and its usage to

write field notes (5.4.2.2). In this case, chronologically taking photographic evidence, and automatically recording the metadata of the images (date, time, location), provided reliable evidence and an audit trail of the process of observations in this case study research (Yin 2018). This approach also aligns well with the personal strengths of the researcher and her general approach to notetaking, who is a keen photographer but does not tend to take written notes often. Digital photography, as a tool for ethnographic notetaking, therefore, was found as the most appropriate for the researcher, allowing to be immersed in the activity instead of being distracted by notetaking, while collecting the required data systematically and reliably.

The importance of this is twofold. Firstly, this showcased that the availability of technology, used for day-to-day activities (such as a mobile phone), can be utilised as a tool for a more comprehensive, comfortable and efficient data collection, especially when it is aligned with the strengths and skills of the researcher. Secondly, the study showed that innovative and contemporary data collection methods should be encouraged and endorsed, especially in studies, driven by pragmatism (5.1.2), as discussed below.

10.4.4 Pragmatic blend of methods

Underpinned by its pragmatic philosophical stance, this qualitative case study takes a multi-method approach, whereby a blend of methods for data collection and analysis is created to provide the most appropriate contribution to the study's aim (Kelly and Cordeiro 2020). Such a pragmatic stance promotes pluralism and eclecticism in research design and takes a value-driven research approach (Johnson and Onwuegbuzie 2004). Here, a blend of qualitative methods included traditional semi-structured interviews, and a more innovative method of digital ethnography, used in unstructured observations (5.2.3). The results of using such an eclectic approach provided evidence of its usefulness to other pragmatic interpretive studies. While qualitative multi-method case studies in tourism have been conducted (see Niewiadomski and Mellon (2023), albeit without any mention of their philosophical stance), the present study provided an innovative mix of qualitative methods and their application.

Conducting observations *before* the interviews allowed the researcher not only to better understand the discussed issues but also to build a better rapport with the participants. Recognising the researcher's prior knowledge of Orkney, at least to some degree, allowed the participants to speak more confidently, knowing that the researcher understood their narrative. This was evident in several interviews, where the researcher's acknowledgement of prior Orkney experience enabled a more meaningful conversation (e.g. conversation with MI-13 on Noup Head track issues in Westray, referred to in 7.1 and 7.2). Moreover, using semi-structured interviews enabled an open in-depth discussion with the participants, where departure from the pre-scripted questions often led to new and interesting information (5.4.1.4). Since one of the objectives of the study was to understand the context of Orkney, these discussions facilitated such understanding to a greater depth.

Conducting observations using the digital ethnographic element of the methodology provided a useful contribution (10.4.3), where photographic evidence, collected during the observations, cemented the researcher's understanding. Moreover, it contributed to the validity and reliability of the study, by evidencing not only the discussed issues but supporting their interpretation by the researcher.

Lastly, including vignettes with the author's reflexive first-person account is another methodological contribution. As discussed in 5.4.2.3, acknowledgement of the potential influence of the researcher's prior knowledge on interpretations and explanations in this study in the form of interpretive reflexivity (Lichterman 2017), was seen as a necessary part of this interpretive qualitative case study. While many other studies include reflexive accounts, here it was decided to include it throughout the thesis, where it most appropriately showcases the analytical thinking of the author. Thus, it demonstrated the open and honest approach to interpretations, acknowledging personal reflections, biases and weaknesses in interpreting situations and people's lived experiences more transparently (Lichterman 2017), and more engaging for the reader. Such an approach is also consistent with the pragmatic stance, underpinning this study, enabling the adoption of a reflexive approach based on the specific context of the study (Kelly and Cordeiro 2020).

It is, therefore, evident that pragmatic interpretive qualitative multi-method design is useful for studies, where an understanding of context-sensitive contested issues and phenomena is required. Methodological lessons learnt from this study can encourage other researchers, interested in actionable knowledge creation, to pragmatically create the most appropriate blend of methods for their enquiry. It can alleviate concerns about taking an innovative, non-traditional approach to case study research, where a mix of philosophical perspectives, digital methods and semi- or unstructured data collection approaches can facilitate robust well-rounded research. Underpinned by an honest and transparent reflexive approach, such research design can also address concerns, observed by Xiao and Smith (2006) regarding the methodological quality of case study research in tourism (5.2.1).

10.5 Conclusions, limitations and further research

In conclusion, this doctoral study addressed several concerns, raised previously in the literature, making its impact on the collective quest for sustainability in tourism and beyond. It empirically confirmed the importance of a place-based approach to sustainability transition in tourism and the significance of understanding the context-specific needs of a place before introducing strategies and policies for its development. The study illustrated the complexity of the relationship between people and their place, unravelled through an in-depth qualitative enquiry. It also made a significant contribution to studies of cold-water islands and archipelagos, by examining the unique manifestation of this geographical context in Orkney Islands. Its results also made their mark in the strategic planning discipline, whereby local tourism strategy was evaluated in the context of the cold-water archipelago. Finally, it offered a practical solution to a real-world problem, contributing to the body of actionable knowledge in tourism, strategic planning, cold-water archipelagos and sustainability transition.

As with any research however, this study has several limitations, which can be seen as opportunities to expand, and gain more understanding of the complex relationships between tourism and sustainability. While it is argued (9.3) that the proposed evaluation framework, PSEF, can be applied, albeit methodologically, to other destinations, this study overall is limited by its applicability to the case of Orkney Islands. It is acknowledged, that the

evaluation of any other strategy, might lead to different results. Therefore, applying the proposed framework to other destinations will provide a helpful insight into its usefulness. Similarly, the application of the Layers of Context model, devised in this study, was limited to the Orkney case only, and it will be useful to find out if it can help other studies that emphasise contextuality to conceptualise their approach.

Practically, this study was challenged by the fact that since the Strategy, at the time of writing, does not yet have an approved action plan, its implementation could not be meaningfully evaluated, as was initially intended. While this is considered a limitation, this in itself became a finding. Nonetheless, repeating the evaluation once the action plan is launched, will provide an invaluable insight into such alignment.

It is also recognised that more can be studied in the archipelagic context of Orkney. For instance, in this context, the study has largely concentrated on the relationship between the Mainland and the outer isles of Orkney, but it did not provide sufficient insight into the relationship between the outer isles themselves (e.g. Westray and Papa Westray). This would have provided an invaluable understanding of the multiple peripherality aspects of Orkney, as suggested by Spilanis, Kizos and Petsioti (2012) and Baldacchino (2015b). The present study, however, was also limited in the researcher's ability to include more participants, due to time and resources constraints - a known limitation of the qualitative approach (Grydehøj 2008). It is hoped that by acknowledging these limitations, further enquiries can be initiated to expand on this study.

This leads this thesis to its conclusion, offering the last reflective account by the author:

This study was about understanding other people's meanings and worldviews, which were, at times, significantly different from my own, but sometimes they resonated perfectly. I am concluding this long but fascinating piece of writing by acknowledging that I did my very best to interpret other people's lived experiences and words (said and unsaid) with as much compassion, open mind and impartiality as I could muster. Yet, I did not shy away from surfacing problems and shortcomings of the Strategy and its stakeholders, where it was supported by my interpretation of the findings. The study,

therefore, provided me with a tremendous opportunity to learn that islands and archipelagos are not only a 'paradise' (Baldacchino 2006a), but a complex "disjuncture, connection and entanglement between and among islands" (Stratford et al. 2011 p. 114), where people endow their place with diverse and contested values (Stedman 2003), creating many Orkneys (may I be forgiven by any Orcadian reading this). For me, this means that Orkney is my kind of paradise.

Vignette 10.1: Paradise

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APPENDICES

Appendix 1: Orkney on the map



Appendix 2: The islands of Orkney



Appendix 3: Pilot interview questionnaire – General

1. In your opinion, to what extent has COVID-19 permanently changed the tourism industry landscape in Scotland/in your area ('new normal')?
2. Will your organisation operate differently post-pandemic?
 - a) What are the greatest challenges facing your business/organisation?
 - b) What are the greatest opportunities facing your business/organisation?
3. In this 'new normal', what do you see as the role of
 - a) UK Government;
 - b) Scottish Government?
4. In this 'new normal', what do you see as the role of government agencies, such as VisitScotland, Regional DMOs, Enterprise agencies?
5. In this 'new normal', what do you see as the role of local communities in tourism development and operation (community councils, development trusts, partnerships etc.)?
6. Are you familiar with Scotland Outlook 2030 tourism strategy?
7. Were you/your organisation consulted regarding/participated in strategy development? If yes, to what extent you/your organisation were involved in it (how and what input did you/your organisation make)? Why you chose to participate?
8. The strategy emphasises the importance of "partnership" between public and private organisations on local, regional and national levels to fulfil its vision. Have you experienced such partnership relationships and in what form? Do you find them beneficial (similar to Q5)?
9. In your opinion, are the objectives of the strategy clear?
10. Do you share the vision of "world leader in 21st century tourism", and the strategic views of this document, for example contribution to the country's net-zero 2045 commitment, community engagement, responsible tourism? Or you would rather it included more growth targets (visitors, expenditure etc), similar to previous Tourism Scotland 2020?
11. Do you think the strategy is relevant to the post-COVID 'new normal'? What would you change?
12. Do you think it is a useful document? Why?
13. In your opinion what will be the challenges for this SO2030 implementation?
14. Who would you recommend for the subsequent interviews?

Appendix 4: Pilot interview questionnaire - Strategy Makers

1. Scotland Outlook 2030 (SO2030) document says: "we will have short term, medium term and longer-term implementation tasks and relevant key performance indicators will be agreed". The strategy was launched just before the pandemic was declared, so is it correct to say that development of detailed tasks and KPIs was put on hold?
 - a. If yes, is it correct to say that during 2020 the focus of the tourism industry leaders was on industry support and recovery, which resulted in STERG National Action Plan introduced in early 2021, as a short-term implementation action tracker, focused on recovery and in line with the SO 2030 strategy?
 - i. If yes, does this mean that a new set of actions will be developed every certain period (5 years) to implement the strategy?
 - b. If no, what progress has been made and when the tasks and KPIs will be published? In particular, the commitment "We will establish measures to help Scottish tourism businesses commit to sustainable practices" (p.29). Also interesting to know what "full contribution to net-zero" means?
2. SO2030 document explains about involvement of 2500 stakeholders in strategy development, via survey, workshops and events. Can you please elaborate on the process? How long it took? What regions were covered? Is it possible to see the results of the surveys and workshops summaries? Is it possible to have list of organisations/stakeholders that were involved in any way in SO 2030 strategy implementation?
3. Do you think consulting 2500 stakeholders was beneficial for SO2030 development, or limiting the consultation to industry organisation at a national/regional levels would have been more beneficial?
4. During the preparation of the SO2030, what were the biggest challenges? (Might be stakeholders' engagement, political influence etc)?
5. SO2030 looks significantly different from its predecessor Tourism Scotland 2020. Why the decision was made to adopt "world leader in 21st century tourism" vision with more strategic views of sustainability, for example contribution to the country's net-zero 2045 commitment, community engagement, responsible tourism, instead of including more pragmatic growth targets/potential (visitor numbers and satisfaction, expenditure etc), similar to previous Tourism Scotland 2020?
6. SO2030 document says: "this is an agile document and has been designed to be responsive to the changing landscape – it will evolve over time". How often it will be reviewed and updated, how and by whom, and how would the stakeholders know it has been updated?
7. Will the SO2030 be (or has it already been) reviewed following the events of the last 15 months and lessons learnt from the crisis? What was changed? Or is it seen as fully relevant to the post-pandemic Scotland?
8. The strategy mentions "right policy and regulatory landscape" as a condition for success. In order to deliver on strategic commitments, cross-industry collaboration must be sought especially on the Government level. For example, contribution to

net-zero must include modernising transport network, but this is not in tourism jurisdiction – how will it work?

9. In your opinion what will be the challenges for this Strategy implementation?
10. Who/what organisation(s) will be responsible for SO2030 strategy implementation? Who will be overseeing and reporting? What is your role in strategy implementation/delivery?
11. Who would you recommend for the subsequent interviews?

Appendix 5: Conceptual framework – provisional Evaluation Criteria

Evaluation Criteria	Interviews
Stage 1. Prerequisites	
A. Needs (RQ1, RQ2)	
1. What is sustainability in Orkney destination	
What do you think sustainability is?	All
What do you understand by environmental, economic and socio-cultural sustainability?	All
Are you aware of global sustainability standards (SDGs etc.)?	All
What needs to happen for you to consider your destination sustainable?	All
What do you think tourism should sustain in your destination?	All
2. New normal	
How COVID affects sustainability needs in the destination?	All
Is there a 'new normal' (are the post-COVID changes permanent)?	All
How COVID affects strategy implementation?	All
What needs to change in tourism industry in Orkney following COVID?	All
B. Success definition (RQ3)	
1. Why strategy	
Why the strategy was developed?	SM
Why it is important to have a sustainable tourism strategy in Orkney?	All
Is the current strategy a useful document?	All
2. What is success	
What does success in strategy implementation mean for you?	All
Is this success achievable?	All
3. Success factors	
What must be true to achieve the success?	All
Who must ensure the success criteria are met?	All
4. Barriers to success	
What are the barriers for achieving this success?	All
How to overcome these barriers?	All
5. Success measurement	
How to measure the success in the strategy implementation?	All
Stage 2. Strategy Evaluation	
A. Strategy development (max. score = 10)	
1. Stakeholder consultation	
EC1: Was the stakeholder map developed prior to consultation?	
Was a stakeholder map developed prior to consultation process?	SM
EC2: Was there a sufficient stakeholder consultation process?	
Was there a stakeholder consultation process?	SM
What stakeholders were consulted? How?	SM
How local community consultation was conducted? Why?	SM
Were the regional/national stakeholders consulted? Why?	SM
Were the relevant environmental and cultural bodies/experts consulted?	SM
Were you/your organisation consulted about strategy development? How?	All
2. Skilled development	
EC3: Was the strategy developed by an appropriately skilled team?	
Who was responsible for the development of the strategy?	SM
Why they were chosen to do so? What relevant skills they have?	SM
Who do you think should be responsible for the strategy development?	All
3. Alternative strategies	
EC4: Were there any alternative strategies considered?	
Were there any alternative strategies considered prior to setting the specific objectives?	SM
4. Ongoing process	
EC5: Does the strategy include review plans?	
In what circumstances the strategy is reviewed/updated?	SM
How the review will be conducted?	SM
When do you think the strategy should be reviewed?	All
B. Strategy content (max. score = 176)	
1. Strategy document	
EC6: Is the strategy document accessible to all stakeholders?	
Do you know where the strategy is published?	All
Were you able to access the document?	All

EC7: Is the strategy readable?	
Have you read the strategy?	All
Is the strategy easy-to-read?	All
Is the structure of the strategy clear?	All
2. Long term vision	
EC8: Does the strategy set out a long term vision (5-10 years)?	
Is the vision of the strategy clear?	All
Do you agree with this vision? Does it fit local community values?	All
Why 2025?	SM
EC9: Does the strategy define its purpose and scope?	
Are the purpose and scope of the strategy clear?	All
EC10: Does the strategy include specific measurable objectives?	
Are the objectives of the strategy clear?	All
What was the reason for these vision and objectives?	SM
3. Current situation analysis	
EC11: Does the strategy include natural and cultural tourism assets inventory?	
Was the tourism product assets inventory conducted as part of strategy development? If not, why?	SM
EC12: Does the strategy include visitor infrastructure assets inventory?	
Was the visitor infrastructure asset inventory conducted as part of strategy development? If not, why?	SM
Does this asset inventory include accessible infrastructure?	SM
EC13: Does the strategy describe the principal geographic, climate and nature features of the area?	
Was the geographic features assessment conducted as part of strategy development? If not, why?	SM
EC14: Does the strategy include market analysis (numbers, expenditure, length of stay)?	
Was the current domestic and international market analysis conducted? If not, why?	SM
Was a forecasting and scenario planning activity conducted?	SM
EC15: Does the strategy include demographic analysis of the destination?	
Was the demographic analysis conducted/does it exist?	SM
EC16: Does the strategy include destination land use and ownership analysis?	
Was the land use/ownership conducted/does it exist?	SM
4. Risk assessment (affected by Stage 1)	
EC17: Does the strategy include/reference risk assessment (RA) and risk mitigation actions?	
Have the environmental, social, cultural and economic impacts of tourism on destination been assessed?	SM
Was a risk assessment conducted? (risks to the sustainability of a destination)	SM
EC18: Does the RA include impact of external factors?	
Were the risks of Brexit considered?	SM
Were the effects of climate change considered?	SM
Were the effects of COVID-19 and other health threats considered?	SM
Were there any other impacts considered?	SM
EC19: Does the strategy reference emergency response procedures?	
Are there emergency response procedures available?	SM
EC20: Does the strategy reference health and safety procedures?	
Are there visitor health and safety procedures available?	SM
5. Economic sustainability (affected by Stage 1)	
EC21: Does the strategy describe economic benefits of tourism industry for the destination?	
EC22: Does the strategy include objectives for equal economic benefits distribution across the area?	
EC23: Does the strategy include/reference programme for periodic economic data gathering?	
Is there a programme for periodic economic data gathering?	SM
EC24: Does the strategy identify other major economic activities in the area?	
EC25: Does the strategy include objective to ensure long-term investment security for local tourism businesses?	
EC26: Does the strategy encourages local businesses growth, to avoid external businesses prevalence?	
EC27: Does the strategy quantify employment percentage (FT, PT, seasonal) in tourism in the destination?	
EC28: Does the strategy include employment creation outlook in tourism in the area?	
EC29: Does the strategy include objectives to create inclusive and accessible tourism business and digital training?	
EC30: Does the strategy reference procedures for tourism employment conditions evaluation and improvements?	
Is there a procedure for tourism employment conditions evaluation and improvements?	SM
EC31: Does the strategy assess the length of tourism season?	
EC32: Does the strategy identify ways to reduce seasonality and dependency on tourism?	
6. Social sustainability (affected by Stage 1)	
EC33: Does the strategy identify local community values, lifestyle features and local quality of life?	
EC34: Does the strategy identify local community attitudes to tourism?	

EC35: Does the strategy identify opportunities and support for community-based tourism?	
EC36: Does the strategy include objective to improve accessibility for people with a range of access needs?	
EC37: Does the strategy include objective to improve and encourage local community access to tourism sites?	
EC38: Does the strategy provide assessment of tourism infrastructure use by local community?	
EC39: Does the strategy include objective to improve tourism infrastructure to meet local community needs?	
EC40: Does the strategy quantify tourism revenue investment in local infrastructure?	
EC41: Does the strategy set out plans for local tourism businesses support and advice?	
EC42: Does the strategy set out plans to support local farmers, food producers, crafts and local supply chain?	
7. Cultural sustainability (affected by Stage 1)	
EC43: Does the strategy include objectives to preserve local cultural heritage and local identity?	
EC44: Does the strategy include objectives to include local cultural heritage in visitor experience?	
EC45: Does the strategy quantify tourism revenue investment in cultural conservation?	
EC46: Does the strategy set out support for local cultural businesses and third sector organisations?	
EC47: Does the strategy emphasise importance of accessible and accurate interpretation materials at cultural sites?	
EC48: Does the strategy set out plans for tourism impact monitoring at cultural sites?	
8. Environmental sustainability (affected by Stage 1)	
EC49: Does the strategy include/reference detailed tourism environmental impact assessment per site? Is there environmental impact assessment available? (see also Risk Assessment in sec. 4)	SM
EC50: Does the strategy include/reference programmes for environmental conservation in the destination? Are there programmes for environmental conservation available?	SM
EC51: Does the strategy prioritise environmental protection activities based on vulnerability assessment? Is there vulnerability assessment available (see also sec. 4 and EC48)	SM
EC52: Does the strategy include objectives to incorporate environmental protection in visitor experience?	
EC53: Does the strategy quantify tourism revenue investment in environmental protection?	
EC54: Does the strategy encourage direct engagement of tourism businesses in environmental protection?	
EC55: Does the strategy reference climate change reports and net zero targets for the destination? Is there a climate change report and net-zero targets available?	SM
EC56: Does the strategy set out tourism contribution to meeting net zero targets for the destination?	
EC57: Does the strategy identify ways to support tourism public, private and third sector to meet net zero targets?	
EC58: Does the strategy identify ways to support visitors to meet its net zero targets?	
EC59: Does the strategy include funding opportunities for environmental impact reduction? Are there funding opportunities available for environmental impact reduction?	SM
EC60: Does the strategy include objectives for sustainable transport infrastructure development?	
EC61: Does the strategy include/reference visitor management plans in the destination? Is there a visitor management plan?	SM
9. Sustainability training and education (affected by Stage 1)	
EC62: Does the strategy include objective to develop sustainability training and education for businesses and staff?	
EC63: Does the strategy include objective to develop sustainability training and education for communities?	
EC64: Does the strategy include objective to develop sustainability training and education for public sector staff?	
EC65: Does the strategy include objective to develop sustainability training and education for visitors?	
10. Marketing (affected by Stage 1)	
EC66: Does the strategy include/reference competitive advantage analysis? Is there a competitive advantage analysis available?	SM
EC67: Does the strategy include/reference destination marketing strategy or plan, aligned with the strategy? Is there a marketing strategy/plan available? Was it developed in line with the tourism strategy?	SM SM
EC68: Does the strategy include/reference process for assessing relevance and accuracy of marketing materials?	
11. Regulatory framework	
EC69: Does the strategy reference global sustainability standards?	
EC70: Does the strategy reference specific policies/regulations/ guidelines which control development?	
EC71: Does the strategy reference regulations on property rental and operation for tourism?	
EC72: Does the strategy reference regulations on environmental protection, inc. climate change?	
EC73: Does the strategy reference laws on human rights, exploitation, discrimination and harassment?	
EC74: Does the strategy reference regulations on the accessibility of visitor sites, facilities and services?	
EC75: Does the strategy reference regulations on the historic and cultural sites conservation?	
EC76: Does the strategy reference laws on intellectual property pertaining in the destination?	
EC77: Does the strategy reference laws wildlife interaction and animal welfare in the destination?	
12. Quality Assurance and accreditation	
EC78: Does the strategy lists businesses certified against tourism sustainability standards? Are there certification schemes available? Which ones?	SM

EC79: Does the set targets for number and percentage of businesses certified against tourism sustainability standards?	
EC80: Does the set out available information and support for sustainability certification?	
13. Wider policy integration	
EC81: Does the strategy reference other relevant local, regional and national environmental, social, economic policies?	
EC82: Does the strategy show alignment to Scotland Outlook 2030 strategy?	
14. Implementation plan (<i>affected by Stage 1</i>)	
EC83: Does the strategy include/reference detailed action plan to implement the set objectives?	
Is there an action plan? If not, why?	SM
EC84: Does the strategy set out implementation progress monitoring processes?	
Was a monitoring process developed?	SM
EC85: Does the strategy set out implementation progress reporting processes?	
EC86: Does the strategy include information about previous reports?	
EC87: Does the strategy include impact evaluation and lessons learnt processes?	
EC88: Does the strategy/action plan identify clear roles and responsibilities for implementation activities?	
Is there a RACI document?	SM
EC89: Does the strategy/action plan include impact assessment of external events on its implementation?	
How will COVID affect the implementation? (see Stage 1)	All
EC90: Does the strategy set out success measurement and success criteria for its implementation?	
What is success, criteria and barriers? (see Stage 1)	All
EC91: Does the strategy emphasise the importance of effective governance, partnership and collaboration?	
EC92: Does the strategy set out plans for comprehensive stakeholder engagement in its implementation?	
EC93: Does the strategy include reference to financial and human resources availability for its implementation?	
C. Strategy implementation (<i>max. score = 24</i>)	
1. Success criteria met	
EC94: Have the set success criteria been met?	
Have the set success criteria been met? Why?	SM
EC95: Have the known barriers been resolved?	
Have the known barriers been overcome? Why?	SM
EC96: Were any new barriers identified and measures taken for their resolution?	
Have new barriers been identified and measures taken for their resolution?	SM
2. Implementation progress	
EC97: Have any of the objectives of the strategy been achieved?	
Have any of the strategy objectives been met?	SM
EC98: Was the action plan updated?	
Was the action plan updated?	SM
EC99: Was the progress reported through appropriate channels?	
Was the progress reported through appropriate channels?	SM
Were you updated on the strategy implementation progress?	All
EC100: Were any lessons learnt recorded and the strategy updated accordingly?	
Were any lessons learnt recorded and the strategy updated accordingly?	SM
3. Implementation evaluation	
EC101: Have the used interventions and instruments produced the expected results?	
Have the implementation actions produced the expected results?	SM
EC102: Would more results have been achieved if different instruments had been used?	
Would more results have been achieved if different actions had been taken?	SM
EC103: Will the results and impacts, including institutional changes, last?	
Will the results and impacts, including institutional changes, last?	SM
EC104: Will the impact last even if the availability of resources change?	
Will the impact last even if the availability of resources change?	SM
EC105: How the achieved results contribute to achieving the strategy vision?	
How the achieved results contribute to achieving the strategy vision?	SM
Stage 3. Recommendations	
A. Orkney future strategy	
B. Rural and Island destinations	

Appendix 6: 'ALL' interview questions – Main study

Questions
Q1: What do you think sustainability is in general, and what are Orkney's sustainability needs?
What do you understand by environmental, economic and socio-cultural sustainability?
What needs to happen for you to consider your destination sustainable?
What do you think tourism should sustain in your destination?
Are you aware of global sustainability standards (SDGs etc.)
Q2: Have you read the strategy? What do you think of it?
Do you know where the strategy is published?
Is the strategy easy-to-read?
Is the structure of the strategy clear?
Q3: What is your understanding of the vision and objectives of the strategy, and what do you think is the reason for these?
Is the vision, purpose, scope and objectives of the strategy clear?
Do you agree with this vision?
Does it fit local community values?
Who do you think should be responsible for the strategy development and implementation?
Q4: What does success in strategy implementation mean for you?
Is this success achievable?
How to measure the success?
Q5: What are the criteria for achieving this success and ways to meet them?
Who must ensure the success criteria are met?
Q6: What are the barriers for achieving this success and how to overcome them?
How to overcome these barriers?
Q7: Were you/your organisation consulted about strategy development?
When and how?
Q8: Have you been updated on the strategy implementation progress?
When and how?
Q9: Is the current strategy a useful document? Why?
Q10: Has COVID affected strategy implementation in Orkney? If so, how? If not, why?
Is there a 'new normal' (are the post-COVID changes permanent)?
How COVID affects strategy implementation?
What needs to change in tourism industry in Orkney following COVID?
When (in what situations) do you think the strategy should be reviewed?
Q11: Based on our discussion, will Orkney's sustainability needs be met by implementing the strategy?
In not, how can the situation be improved?

Appendix 7: 'SM' interview questions – Main study

Questions - SM

Q1: What do you think sustainability is and what are Orkney's sustainability needs?

What do you understand by environmental, economic and socio-cultural sustainability?

What needs to happen for you to consider your destination sustainable?

What do you think tourism should sustain in your destination?

Are you aware of global sustainability standards (SDGs etc.)

Q2: What does success in strategy implementation mean for you?

Is this success achievable?

How to measure the success?

Q3: What are the criteria for achieving this success and ways to meet them?

Who must ensure the success criteria are met?

Were any of the success criteria met already?

Q4: What are the barriers for achieving this success and how to overcome them?

How to overcome these barriers?

Were any new barriers identified after the launch of the strategy?

Q5: How has the development of the strategy worked and who was responsible for it?

Why they were chosen to do so? What relevant skills they have?

Who do you think should be responsible for the strategy development?

Q6: Was there a stakeholder consultation process? How did it work?

Was a stakeholder map developed prior to consultation process?

What stakeholders were consulted? How?

How local community consultation was conducted? Why?

Were the regional/national stakeholders consulted? Why?

Were the relevant environmental and cultural bodies/experts consulted?

Q7: What is your understanding of the vision and objectives of the strategy, and what do you think is the reason for these?

Why 2025?

Was it important to align it with SO2030?

Was it important to align it with other relevant strategies (marine, transport, economy etc.)?

Were there any alternative strategies considered prior to setting the specific objectives?

Do you agree with this vision and objectives?

Does it fit local community values?

Q8: Was the original state of tourism industry in Orkney assessed? What was assessed and how? If not, why?

Was the tourism product assets inventory conducted as part of strategy development?

Was the visitor infrastructure asset inventory conducted as part of strategy development, inc. local usage?

Does this asset inventory include accessible infrastructure?

Was the geographic features assessment conducted as part of strategy development?

Was the current domestic and international market analysis conducted?

Was a forecasting and scenario planning activity conducted?

Was the demographic analysis conducted/does it exist?

Was the land use/ownership conducted/does it exist?

Q9: Have the environmental, social, cultural and economic impacts been assessed? What and how?

Have the environmental, social, cultural and economic impacts of tourism on destination been assessed?

Is there vulnerability assessment available per site/area?

Were the risks of Brexit considered?

Were the risks of climate change considered?

Were the risks of COVID-19 and other health threats considered?

Were there any other risks and impacts considered?

Are there emergency response procedures available?

Are there visitor health and safety procedures available?

Q10: Is the tourism related economic, environmental and socio-cultural data gathered periodically? What and how?

Stats of new businesses, revenues, employment?

Procedures for tourism employment conditions evaluation and improvements?

Environmental conditions/impact periodic data?

Q11: Under what circumstances is the strategy planned to be reviewed/updated?

How the review will be conducted?

Was the strategy reviewed following COVID?

Q12: Were plans to tackle environmental issues and support Orkney's transition to net-zero economy considered in strategy-making?

Are there programmes/plans for environmental protection/net-zero available?

Is there a climate change report and net-zero targets available?

Are there funding opportunities available for environmental impact reduction?

Is there information on % of tourism revenue invested in environmental and cultural conservation?

Is there a visitor management plan?

Q13: Are there sustainability certification schemes available in Orkney?

Is there a record/stats of how many businesses are certified?

Are there targets for certification?

Q14: How the destination ensures effective and relevant marketing, aligned with the objectives of the strategy?

Is there a competitive advantage analysis available?

Is there a marketing strategy/plan available?

Was it developed in line with the tourism strategy?

Q15: Is there an action plan for strategy implementation? If yes, how it works? If not, why?

Was a monitoring process developed?

Are the roles and responsibilities clearly defined (RACI document)?

Q16: Have any of the strategy objectives been met? If yes, what and how? If not, why?

Was the action plan updated?

Was the progress reported through appropriate channels?

Were any lessons learnt recorded and the strategy updated accordingly?

Q17: Have the implementation actions produced the expected results?

Would more results have been achieved if different actions had been taken?

Will the results and impacts, including institutional changes, last?

Will the impact last even if the availability of resources change?

How the achieved results contribute to achieving the strategy vision?

Q18: Is the current strategy a useful document? Why?

Q19: Has COVID affected strategy implementation in Orkney? If so, how? If not, why?

Is there a 'new normal' (are the post-COVID changes permanent)?

How COVID affects strategy implementation?

What needs to change in tourism industry in Orkney following COVID?

Q20: Based on our discussion, will Orkney's sustainability needs be met by implementing the strategy?

In not, how can the situation be improved?

Appendix 8: 'NAT' interview questions – Main study

Questions - NAT

Q1: What do you think sustainability is in general, and what are the sustainability needs in rural and island Scotland?

What do you understand by environmental, economic and socio-cultural sustainability?

What needs to happen for you to consider your destination sustainable?

What do you think tourism should sustain in your destination?

Are you aware of global sustainability standards (SDGs etc.)

Q2: How do you think sustainability can be achieved in rural and island tourism destinations in Scotland?

Orkney in particular?

Q3: What is your opinion on local tourism strategies, considering SO2030? Are they important? Why?

How SO2030 ensures its relevance to specific destinations, rural and island in particular?

How local strategies are supported by policies and resources on a national level?

Q4: What are the main challenges rural and island destinations face in strategy development and implementation?

How do you think rural and island destinations engage with stakeholders?

Q5: What does success in sustainable tourism strategies implementation mean for you?

Is this success achievable?

How to measure this success?

Q6: What are the criteria for achieving this success and ways to meet them?

Who must ensure the success criteria are met (locally or nationally)?

Q7: What are the barriers for achieving this success and how to overcome them?

How to overcome these barriers?

Q8: Which rural or island destination in Scotland has successfully implemented sustainable tourism strategy?

Q9: Has COVID affected strategy implementation in Scotland? If so, how? If not, why?

Is there a 'new normal' (are the post-COVID changes permanent)?

What needs to change in tourism industry in Scotland following COVID?

Q10: Moving forward, what key considerations local destinations should make when developing a sustainable tourism strategy?

Q11: Based on our discussion, will Scotland's sustainability needs be met by implementing its strategies on national and local levels?

In not, how the situation can be improved?

Appendix 9: Participants' attributes summary

Geography	Count	%
Local	30	94%
National	1	3%
Global	1	3%
Grand Total	32	100%

Origin	Count	%
Incomers	18	56%
Native came back	4	13%
Native Orcadian	8	25%
Not Applicable	2	6%
Grand Total	32	100%

Tourism sector	Count	%
Directly	13	41%
Indirectly	16	50%
Not involved	2	6%
Wants to be involved	1	3%
Grand Total	32	100%

Location	Count	%
East Mainland	2	6%
Hoy	1	3%
Kirkwall	3	9%
North Ronaldsay	1	3%
The Mainland	14	44%
Shapinsay	1	3%
South Ronaldsay	2	6%
West Mainland	4	13%
Westray	2	6%
Scotland mainland	1	3%
Elswhere	1	3%
Grand Total	32	100%

Appendix 10: Main interviews' details

Interviews	Date	Location	Questionnaire
MI-01	17/01/2022	Zoom	SM_01
MI-02	19/01/2022	Zoom	ALL_01
MI-03	20/01/2022	Zoom	SM_01
MI-04	24/01/2022	Zoom	SM_01
MI-05	27/01/2022	Zoom	SM_01
MI-06	27/01/2022	Zoom	SM_01
MI-07	15/02/2022	Zoom	NAT_01
MI-08	16/02/2022	Zoom	ALL_01
MI-09	02/03/2022	Zoom	ALL_01
MI-10-1	09/03/2022	Zoom	ALL_01
MI-10-2 (Same MI-10 participant)	17/03/2022	Zoom	ALL_01
MI-11	10/03/2022	Zoom	ALL_01
MI-12	11/03/2022	MS Teams	ALL_01
MI-13 (two participants)	14/03/2022	Zoom	ALL_01
MI-14	21/03/2022	Zoom	ALL_01
MI-15	05/04/2022	Zoom	ALL_01
MI-16	08/04/2022	Zoom	ALL_01
MI-17	11/04/2022	Zoom	ALL_01
MI-18	18/04/2022	Zoom	ALL_01
MI-19	28/04/2022	Zoom	ALL_01
MI-20	29/04/2022	MS Teams	Mixed
MI-21	02/05/2022	Zoom	ALL_01
MI-22	17/05/2022	Zoom	ALL_01
MI-23	20/05/2022	Zoom	ALL_01
MI-24	06/06/2022	Zoom	ALL_01
MI-25	06/06/2022	Zoom	ALL_01
MI-26	15/06/2022	Zoom	ALL_01
MI-27	23/06/2022	Destination Orkney HQ	Mixed
MI-28	29/06/2022	Burnside Farm	ALL_01
MI-29	29/06/2022	ORIC	ALL_01
MI-30	02/08/2022	Zoom	ALL_01
MI-31	15/09/2022	Zoom	Mixed

Appendix 11: Transcript extract

MI-13b: *We had a couple that came for B&B last year and I would say they were a little bit up, a little bit uptight, a little bit stressed.*

MI-13a: *Oh yeah, I recall them.*

MI-13b: *And the first, the first night there I think we got called on about six times and it was [...]...*

MI-13a: *...Oh yeah, it was like...*

MI-13b: *...and you thought, Oh my God...*

MI-13a: *...do you have a 'do not disturb' sign for the door? ...and so I said 'I don't but, you know'...*

Researcher: *...no one's going to disturb you...(laughing)*

MI-13a: *Yeah. And they said, Oh, it's just that, you know, we maybe don't want the cleaners to come in for whatever, and I said, I'm also the cleaner, you know, so...*

MI-13b: *...Oh, that's that sorted!*

MI-13a: *Well, then you know we're in at the moment, you know? And it was getting them to realise that, you know, there weren't 10 different staff. It was just me for all of the things. I was cooking their breakfast, and I was cleaning their room and whatever. And the longer they were with us, the more they...*

MI-13b: *...relaxed...*

MI-13a: *...settled, you know.*

MI-13b: *And by the time they left they stood and spoke to us for 15-20 minutes, maybe before they left to go, and they're so chilled out in comparison when they came. And she actually got quite emotional about it. She just, she said, we've been planning to come for 20 or 30 years. She says we've ended up going to Russia, which is... not going to go there now. And she says, I was never made it. I'm so glad that we've made it. And she is, she pinpointed, Come to Westray, I am so glad that we made the effort to come. Which is encouraging for us because I think they felt that they got it. Yeah, it kind of understood that.*

MI-13a: *Yeah.*

MI-13b: *And and basically said, can't wait until you come back and then that you sent us a lovely email when they got home, We're home! Ta-da-da-da. We can't wait to come again. And four days before that, you were just thinking, Oh my word, yeah, are they going to survive? (laughing).*

So I think I think that's just, Orkney does have something good to offer, and I think Westray does. I think Westray's got something good to offer. And if people come for long enough and they get it, you don't even need to sell it after that. You know, you can have all the strategies that you have that you want to put in the world. You don't need them because they've got it. And that's the easy part with tourism. If your customers have got it, you don't even need to bother trying after that, you'll see them probably next year or the year afterwards, you know.

Appendix 12: Photographs classification sheet

Classification name	Date taken	Time taken	Place taken	Camera
IMG_7807	18/06/2022	12:58	Gills Bay	iPhone 11 Pro
IMG_5985	18/06/2022	02:30	Pentland Ferry	Canon EOS 80D
IMG_6018	18/06/2022	02:58	Pentland Ferry	Canon EOS 80D
IMG_7857	19/06/2022	10:45	Kirkwall	iPhone 11 Pro
IMG_6024	19/06/2022	12:52	Kirkwall	Canon EOS 80D
IMG_6039	19/06/2022	01:02	Kirkwall	Canon EOS 80D
IMG_6058	19/06/2022	01:19	Kirkwall	Canon EOS 80D
IMG_7878	19/06/2022	01:45	Kirkwall	iPhone 11 Pro
IMG_6074	19/06/2022	04:05	Scapa Beach	Canon EOS 80D
IMG_6078	19/06/2022	04:06	Scapa Beach	Canon EOS 80D
IMG_6122	19/06/2022	04:30	Scapa Beach	Canon EOS 80D
IMG_7940	20/06/2022	09:15	Rousay	iPhone 11 Pro
IMG_6140	20/06/2022	09:22	Rousay	Canon EOS 80D
IMG_6144	20/06/2022	09:24	Rousay	Canon EOS 80D
IMG_6168	20/06/2022	09:33	Rousay	Canon EOS 80D
IMG_6178	20/06/2022	09:47	Rousay	Canon EOS 80D
IMG_6192	20/06/2022	10:12	Rousay	Canon EOS 80D
IMG_7997	20/06/2022	10:52	Rousay	iPhone 11 Pro
IMG_6222	20/06/2022	11:11	Rousay	Canon EOS 80D
IMG_6226	20/06/2022	11:12	Rousay	Canon EOS 80D
IMG_6229	20/06/2022	11:20	Rousay	Canon EOS 80D
IMG_6236	20/06/2022	11:23	Rousay	Canon EOS 80D
IMG_6248	20/06/2022	12:14	Rousay	Canon EOS 80D
IMG_6261	20/06/2022	12:49	Rousay	Canon EOS 80D
IMG_8101	20/06/2022	05:01	Rousay	iPhone 11 Pro
IMG_6265	21/06/2022	08:48	Hatston Bay	Canon EOS 80D
IMG_6266	21/06/2022	08:48	Hatston Bay	Canon EOS 80D
IMG_6267	21/06/2022	08:51	Hatston Bay	Canon EOS 80D
IMG_8121	21/06/2022	09:52	Stones of Stennes	iPhone 11 Pro
IMG_6278	21/06/2022	09:58	Stones of Stennes	Canon EOS 80D
IMG_6279	21/06/2022	09:58	Stones of Stennes	Canon EOS 80D
IMG_6281	21/06/2022	09:59	Stones of Stennes	Canon EOS 80D
IMG_6282	21/06/2022	09:59	Stones of Stennes	Canon EOS 80D
IMG_6283	21/06/2022	09:59	Stones of Stennes	Canon EOS 80D
IMG_6284	21/06/2022	09:59	Stones of Stennes	Canon EOS 80D
IMG_6285	21/06/2022	09:59	Stones of Stennes	Canon EOS 80D
IMG_6286	21/06/2022	09:59	Stones of Stennes	Canon EOS 80D
IMG_8126	21/06/2022	09:59	Stones of Stennes	iPhone 11 Pro
IMG_6288	21/06/2022	10:00	Stones of Stennes	Canon EOS 80D
IMG_6294	21/06/2022	10:02	Stones of Stennes	Canon EOS 80D
IMG_6295	21/06/2022	10:03	Stones of Stennes	Canon EOS 80D
IMG_6296-2	21/06/2022	10:13	Ring of Brodgar	Canon EOS 80D
IMG_6296	21/06/2022	10:13	Ring of Brodgar	Canon EOS 80D

IMG_6297-2	21/06/2022	10:13	Ring of Brodgar	Canon EOS 80D
IMG_6297	21/06/2022	10:13	Ring of Brodgar	Canon EOS 80D
IMG_6299	21/06/2022	10:16	Ring of Brodgar	Canon EOS 80D
IMG_6300	21/06/2022	10:16	Ring of Brodgar	Canon EOS 80D
IMG_6301	21/06/2022	10:17	Ring of Brodgar	Canon EOS 80D
IMG_6304	21/06/2022	10:17	Ring of Brodgar	Canon EOS 80D
IMG_6308	21/06/2022	10:19	Ring of Brodgar	Canon EOS 80D
IMG_6310	21/06/2022	10:20	Ring of Brodgar	Canon EOS 80D
IMG_6311	21/06/2022	10:22	Ring of Brodgar	Canon EOS 80D
IMG_6312	21/06/2022	10:22	Ring of Brodgar	Canon EOS 80D
IMG_6313	21/06/2022	10:22	Ring of Brodgar	Canon EOS 80D
IMG_6314	21/06/2022	10:22	Ring of Brodgar	Canon EOS 80D
IMG_6321	21/06/2022	10:24	Ring of Brodgar	Canon EOS 80D
IMG_6325	21/06/2022	10:25	Ring of Brodgar	Canon EOS 80D
IMG_6326	21/06/2022	10:25	Ring of Brodgar	Canon EOS 80D
IMG_6327	21/06/2022	10:25	Ring of Brodgar	Canon EOS 80D
IMG_6364	21/06/2022	10:34	Ring of Brodgar	Canon EOS 80D
IMG_6365	21/06/2022	10:34	Ring of Brodgar	Canon EOS 80D
IMG_6370	21/06/2022	10:34	Ring of Brodgar	Canon EOS 80D
IMG_8147	21/06/2022	10:38	Ring of Brodgar	iPhone 11 Pro
IMG_6400	21/06/2022	10:41	Ring of Brodgar	Canon EOS 80D
IMG_6403	21/06/2022	10:43	Ring of Brodgar	Canon EOS 80D
IMG_6408	21/06/2022	10:44	Ring of Brodgar	Canon EOS 80D
IMG_8152	21/06/2022	10:48	Ring of Brodgar	iPhone 11 Pro
IMG_6410	21/06/2022	11:19	Skara Brae	Canon EOS 80D
IMG_6412	21/06/2022	11:21	Skara Brae	Canon EOS 80D
IMG_6413	21/06/2022	11:22	Skara Brae	Canon EOS 80D
IMG_6415	21/06/2022	11:24	Skara Brae	Canon EOS 80D
IMG_6418	21/06/2022	11:26	Skara Brae	Canon EOS 80D
IMG_6419	21/06/2022	11:26	Skara Brae	Canon EOS 80D
IMG_6423	21/06/2022	11:27	Skara Brae	Canon EOS 80D
IMG_6424	21/06/2022	11:27	Skara Brae	Canon EOS 80D
IMG_6429	21/06/2022	11:28	Skara Brae	Canon EOS 80D
IMG_6430	21/06/2022	11:28	Skara Brae	Canon EOS 80D
IMG_6432	21/06/2022	11:30	Skara Brae	Canon EOS 80D
IMG_6434	21/06/2022	11:30	Skara Brae	Canon EOS 80D
IMG_6473	21/06/2022	12:35	Yesnaby	Canon EOS 80D
IMG_6526	21/06/2022	01:03	Yesnaby	Canon EOS 80D
IMG_6612	21/06/2022	01:31	Yesnaby	Canon EOS 80D
IMG_6639	21/06/2022	02:32	Yesnaby	Canon EOS 80D
IMG_8260	21/06/2022	04:07	Kirkwall	iPhone 11 Pro
IMG_8261	21/06/2022	04:15	Kirkwall	iPhone 11 Pro
IMG_8262	21/06/2022	04:17	Kirkwall	iPhone 11 Pro
IMG_8264	21/06/2022	04:18	Kirkwall	iPhone 11 Pro

IMG_8309	22/06/2022	11:20	Newark Beach	iPhone 11 Pro
IMG_8312	22/06/2022	11:22	Newark Beach	iPhone 11 Pro
IMG_6684	22/06/2022	11:24	Newark Beach	Canon EOS 80D
IMG_6744	22/06/2022	12:07	Point of Ayre	Canon EOS 80D
IMG_8331	22/06/2022	12:08	Point of Ayre	iPhone 11 Pro
IMG_8350	22/06/2022	02:12	Kirkwall Bay	iPhone 11 Pro
IMG_8351	22/06/2022	02:12	Kirkwall Bay	iPhone 11 Pro
IMG_8352	22/06/2022	02:12	Kirkwall Bay	iPhone 11 Pro
IMG_8357	22/06/2022	02:14	Kirkwall Bay	iPhone 11 Pro
IMG_8363	22/06/2022	02:17	Kirkwall Bay	iPhone 11 Pro
IMG_8364	22/06/2022	02:17	Kirkwall Harbour	iPhone 11 Pro
IMG_8365	22/06/2022	02:19	Kirkwall Harbour	iPhone 11 Pro
IMG_8366	22/06/2022	02:20	Kirkwall Harbour	iPhone 11 Pro
IMG_8368	22/06/2022	02:20	Kirkwall Harbour	iPhone 11 Pro
IMG_8369	22/06/2022	02:22	Kirkwall Harbour	iPhone 11 Pro
IMG_8370	22/06/2022	02:22	Kirkwall Harbour	iPhone 11 Pro
IMG_8371	22/06/2022	02:22	Kirkwall Harbour	iPhone 11 Pro
IMG_8372	22/06/2022	02:23	Kirkwall	iPhone 11 Pro
IMG_8373	22/06/2022	02:23	Kirkwall	iPhone 11 Pro
IMG_8374	22/06/2022	02:25	Kirkwall	iPhone 11 Pro
IMG_8375	22/06/2022	02:25	Kirkwall	iPhone 11 Pro
IMG_8376	22/06/2022	02:28	Kirkwall	iPhone 11 Pro
IMG_8377	22/06/2022	02:30	Kirkwall	iPhone 11 Pro
IMG_8378	22/06/2022	02:30	Kirkwall	iPhone 11 Pro
IMG_8379	22/06/2022	02:34	Kirkwall	iPhone 11 Pro
IMG_8380	22/06/2022	02:34	Kirkwall	iPhone 11 Pro
IMG_8381	22/06/2022	02:35	Kirkwall	iPhone 11 Pro
IMG_8382	22/06/2022	02:35	Kirkwall	iPhone 11 Pro
IMG_8383	22/06/2022	02:35	Kirkwall	iPhone 11 Pro
IMG_8384	22/06/2022	02:35	Kirkwall	iPhone 11 Pro
IMG_8385	22/06/2022	02:36	Kirkwall	iPhone 11 Pro
IMG_8386	22/06/2022	02:36	Kirkwall	iPhone 11 Pro
IMG_8387	22/06/2022	02:36	Kirkwall	iPhone 11 Pro
IMG_8388	22/06/2022	02:37	Kirkwall	iPhone 11 Pro
IMG_8389	22/06/2022	02:37	Kirkwall	iPhone 11 Pro
IMG_8390	22/06/2022	02:37	Kirkwall	iPhone 11 Pro
IMG_8391	22/06/2022	02:37	Kirkwall	iPhone 11 Pro
IMG_8392	22/06/2022	02:38	Kirkwall	iPhone 11 Pro
IMG_8393	22/06/2022	02:53	Kirkwall	iPhone 11 Pro
IMG_8394	22/06/2022	02:54	Kirkwall	iPhone 11 Pro
IMG_8395	22/06/2022	03:26	Kirkwall	iPhone 11 Pro
IMG_8397	22/06/2022	04:01	Kirkwall Library	iPhone 11 Pro
IMG_8398	22/06/2022	05:41	Kirkwall Library	iPhone 11 Pro
IMG_8399	22/06/2022	05:41	Kirkwall Library	iPhone 11 Pro

IMG_8404	23/06/2022	01:06	Kirkwall	iPhone 11 Pro
IMG_8405	23/06/2022	01:07	Kirkwall	iPhone 11 Pro
IMG_6764	23/06/2022	02:07	Waukmill Bay	Canon EOS 80D
IMG_8409	23/06/2022	02:07	Waukmill Bay	iPhone 11 Pro
IMG_6835	23/06/2022	04:10	Maeshowe	Canon EOS 80D
IMG_8441	23/06/2022	04:11	Maeshowe	iPhone 11 Pro
IMG_6844	23/06/2022	04:59	Maeshowe	Canon EOS 80D
IMG_8447	23/06/2022	05:18	Stones of Stennes	iPhone 11 Pro
IMG_9731	23/06/2022	05:18	Stones of Stennes	Canon EOS 80D
IMG_9798	23/06/2022	05:29	Stones of Stennes	Canon EOS 80D
IMG_8466	23/06/2022	05:43	Stones of Stennes	iPhone 11 Pro
IMG_8467	23/06/2022	05:43	Stones of Stennes	iPhone 11 Pro
IMG_8470	24/06/2022	07:07	Kirkwall Airport	iPhone 11 Pro
IMG_8471	24/06/2022	07:13	Kirkwall Airport	iPhone 11 Pro
IMG_8472	24/06/2022	07:18	Kirkwall Airport	iPhone 11 Pro
IMG_8476	24/06/2022	12:39	Kirkwall	iPhone 11 Pro
IMG_8477	24/06/2022	12:40	Kirkwall	iPhone 11 Pro
IMG_8478	24/06/2022	12:41	Kirkwall	iPhone 11 Pro
IMG_8480	24/06/2022	01:29	Kirkwall	iPhone 11 Pro
IMG_8481	24/06/2022	01:42	Kirkwall	iPhone 11 Pro
IMG_8482	24/06/2022	01:55	Kirkwall Museum	iPhone 11 Pro
IMG_8484	24/06/2022	01:58	Kirkwall Museum	iPhone 11 Pro
IMG_8485	24/06/2022	02:25	Kirkwall Museum	iPhone 11 Pro
IMG_8487	24/06/2022	02:29	Kirkwall Museum	iPhone 11 Pro
IMG_8488	24/06/2022	02:32	Kirkwall Museum	iPhone 11 Pro
IMG_8490	24/06/2022	02:39	Kirkwall Museum	iPhone 11 Pro
IMG_8492	24/06/2022	03:11	Kirkwall Museum	iPhone 11 Pro
IMG_8494	24/06/2022	03:39	Kirkwall Museum	iPhone 11 Pro
IMG_9855	25/06/2022	10:18	Click Mill	Canon EOS 80D
IMG_8512	25/06/2022	10:53	Click Mill	iPhone 11 Pro
IMG_9875	25/06/2022	10:53	Click Mill	Canon EOS 80D
IMG_9906	25/06/2022	11:18	Kirbuster Museum	Canon EOS 80D
IMG_9920	25/06/2022	11:23	Kirbuster Museum	Canon EOS 80D
IMG_9995	25/06/2022	12:16	Brough of Birsay	Canon EOS 80D
IMG_9999	25/06/2022	12:18	Brough of Birsay	Canon EOS 80D
IMG_0011	25/06/2022	12:22	Brough of Birsay	Canon EOS 80D
IMG_0059	25/06/2022	12:34	Brough of Birsay	Canon EOS 80D
IMG_0132	25/06/2022	12:53	Brough of Birsay	Canon EOS 80D
IMG_0147	25/06/2022	12:59	Brough of Birsay	Canon EOS 80D
IMG_0208	25/06/2022	02:41	Kirkwall Harbour	Canon EOS 80D
IMG_0210	25/06/2022	02:46	Kirkwall Harbour	Canon EOS 80D
IMG_0214	25/06/2022	02:53	Kirkwall	Canon EOS 80D
IMG_0216	25/06/2022	02:53	Kirkwall	Canon EOS 80D
IMG_0217	25/06/2022	02:54	Kirkwall Harbour	Canon EOS 80D

IMG_0223	25/06/2022	02:58	Kirkwall	Canon EOS 80D
IMG_0225	25/06/2022	02:58	Kirkwall	Canon EOS 80D
IMG_0232	25/06/2022	03:02	Kirkwall	Canon EOS 80D
IMG_0233	25/06/2022	03:02	Kirkwall	Canon EOS 80D
IMG_0234	25/06/2022	03:03	Kirkwall	Canon EOS 80D
IMG_0235	25/06/2022	03:03	Kirkwall	Canon EOS 80D
IMG_0236	25/06/2022	03:03	Kirkwall	Canon EOS 80D
IMG_8578	26/06/2022	08:32	Kirkwall Bay	iPhone 11 Pro
IMG_0242	26/06/2022	09:04	Kirkwall Bay	Canon EOS 80D
IMG_0249	26/06/2022	09:06	Kirkwall Bay	Canon EOS 80D
IMG_0255	26/06/2022	09:06	Kirkwall Bay	Canon EOS 80D
IMG_0257	26/06/2022	09:07	Kirkwall Bay	Canon EOS 80D
IMG_0260	26/06/2022	09:08	Kirkwall Bay	Canon EOS 80D
IMG_0266	26/06/2022	09:09	Kirkwall Bay	Canon EOS 80D
IMG_0383	26/06/2022	01:13	Sanday	Canon EOS 80D
IMG_0389	26/06/2022	01:46	Sanday	Canon EOS 80D
IMG_0390	26/06/2022	01:46	Sanday	Canon EOS 80D
IMG_0395	26/06/2022	04:47	Sanday	Canon EOS 80D
IMG_0404	26/06/2022	05:20	Sanday	Canon EOS 80D
IMG_8638	26/06/2022	10:01	Sanday	iPhone 11 Pro
IMG_0440	27/06/2022	09:25	Sanday	Canon EOS 80D
IMG_0482	27/06/2022	09:45	Sanday	Canon EOS 80D
IMG_0495	27/06/2022	09:52	Sanday	Canon EOS 80D
IMG_0537	27/06/2022	11:17	Sanday	Canon EOS 80D
IMG_0540	27/06/2022	11:20	Sanday	Canon EOS 80D
IMG_0542	27/06/2022	11:34	Sanday	Canon EOS 80D
IMG_0543	27/06/2022	11:50	Sanday	Canon EOS 80D
IMG_8753	28/06/2022	01:15	Stromness	iPhone 11 Pro
IMG_8761	28/06/2022	01:23	Stromness	iPhone 11 Pro
IMG_8778	28/06/2022	01:26	Stromness	iPhone 11 Pro
IMG_8781	28/06/2022	01:27	Stromness	iPhone 11 Pro
IMG_8783	28/06/2022	01:35	Stromness	iPhone 11 Pro
IMG_8784	28/06/2022	01:37	Stromness	iPhone 11 Pro
IMG_8785	28/06/2022	01:41	Stromness	iPhone 11 Pro
IMG_8787	28/06/2022	01:46	Stromness	iPhone 11 Pro
IMG_0587	28/06/2022	03:56	Stromness	Canon EOS 80D
IMG_0589	28/06/2022	03:57	Stromness	Canon EOS 80D
IMG_0596	28/06/2022	03:59	Stromness	Canon EOS 80D
IMG_0598	28/06/2022	04:03	Stromness	Canon EOS 80D
IMG_0600	28/06/2022	04:05	Stromness	Canon EOS 80D
IMG_0632	28/06/2022	04:11	Stromness	Canon EOS 80D
IMG_0681	28/06/2022	04:21	Stromness	Canon EOS 80D
IMG_0729	28/06/2022	04:30	Stromness	Canon EOS 80D
IMG_0735	28/06/2022	04:34	Stromness	Canon EOS 80D

IMG_0745	28/06/2022	04:50	Stromness	Canon EOS 80D
IMG_0750	28/06/2022	04:51	Stromness	Canon EOS 80D
IMG_0758	28/06/2022	06:02	Stromness	Canon EOS 80D
IMG_0775	28/06/2022	06:06	Stromness	Canon EOS 80D
IMG_8832	29/06/2022	02:59	Stromness	iPhone 11 Pro
2021-07-11_13-25-02_283	11/07/2021	01:25	St Margaret's Hope	iPhone 11 Pro
2021-07-11_15-37-47_404	11/07/2021	03:37	St Margaret's Hope	iPhone 11 Pro
2021-07-11_15-43-39_766	11/07/2021	03:43	St Margaret's Hope	iPhone 11 Pro
2021-07-11_15-48-04_514	11/07/2021	03:48	St Margaret's Hope	iPhone 11 Pro
2021-07-11_15-57-31_959	11/07/2021	03:57	St Margaret's Hope	iPhone 11 Pro
2021-07-11_16-08-36_124	11/07/2021	04:08	St Margaret's Hope	iPhone 11 Pro
2021-07-11_16-19-19_347	11/07/2021	04:19	St Margaret's Hope	iPhone 11 Pro
2021-07-12_10-42-04_652	12/07/2021	10:42	Italian Chapel	iPhone 11 Pro
2021-07-12_10-46-22_613	12/07/2021	10:46	Italian Chapel	iPhone 11 Pro
2021-07-12_11-40-41_745	12/07/2021	11:40	Mull Head	iPhone 11 Pro
2021-07-12_12-03-05_116	12/07/2021	12:03	Mull Head	iPhone 11 Pro
2021-07-12_12-59-01_584	12/07/2021	12:59	Mull Head	iPhone 11 Pro
2021-07-12_13-14-50_514	12/07/2021	01:14	Mull Head	iPhone 11 Pro
2021-07-12_16-39-37_300	12/07/2021	04:39	Kirkwall	iPhone 11 Pro
2021-07-12_16-42-37_362	12/07/2021	04:42	Kirkwall	iPhone 11 Pro
2021-07-12_16-43-33_873	12/07/2021	04:43	Kirkwall	iPhone 11 Pro
2021-07-12_16-44-24_048	12/07/2021	04:44	Kirkwall	iPhone 11 Pro
2021-07-12_16-44-53_607	12/07/2021	04:44	Kirkwall	iPhone 11 Pro
2021-07-13_08-35-05_516	13/07/2021	08:35	Pickaquoy Campsite	iPhone 11 Pro
2021-07-13_10-05-04_592	13/07/2021	10:05	Broch of Gurness	iPhone 11 Pro

2021-07-13_10-08-04_485	13/07/2021	10:08	Broch of Gurness	iPhone 11 Pro
2021-07-13_10-22-28_021	13/07/2021	10:22	Broch of Gurness	iPhone 11 Pro
2021-07-13_12-55-46_984	13/07/2021	12:55	Birsay Whalebone	iPhone 11 Pro
2021-07-13_13-31-59_940	13/07/2021	01:32	Birsay	iPhone 11 Pro
2021-07-13_13-36-53_575	13/07/2021	01:36	Birsay	iPhone 11 Pro
2021-07-13_13-42-36_357	13/07/2021	01:42	Birsay	iPhone 11 Pro
2021-07-13_14-56-17_216	13/07/2021	02:56	Birsay	iPhone 11 Pro
2021-07-13_15-12-07_751	13/07/2021	03:12	Birsay	iPhone 11 Pro
2021-07-13_15-45-18_497	13/07/2021	03:45	Skara Brae	iPhone 11 Pro
2021-07-13_16-07-04_714	13/07/2021	04:07	Skara Brae	iPhone 11 Pro
2021-07-13_16-13-42_065	13/07/2021	04:13	Skara Brae	iPhone 11 Pro
2021-07-13_16-14-00_347	13/07/2021	04:14	Skara Brae	iPhone 11 Pro
2021-07-14_10-10-23_918	14/07/2021	10:10	Kirkwall	iPhone 11 Pro
2021-07-14_10-16-44_229	14/07/2021	10:16	Kirkwall	iPhone 11 Pro
2021-07-14_11-07-57_254	14/07/2021	11:07	Kirkwall	iPhone 11 Pro
2021-07-15_08-19-09_894	15/07/2021	08:19	Pickaquoy Campsite	iPhone 11 Pro
2021-07-15_10-00-43_501	15/07/2021	10:00	Maeshowe	iPhone 11 Pro
2021-07-15_11-02-42_001	15/07/2021	11:02	Stones of Stennes	iPhone 11 Pro
2021-07-15_11-06-30_442	15/07/2021	11:06	Stones of Stennes	iPhone 11 Pro
2021-07-15_11-53-00_960	15/07/2021	11:53	Ness of Brodgar	iPhone 11 Pro
2021-07-15_11-57-45_277	15/07/2021	11:57	Ness of Brodgar	iPhone 11 Pro
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Appendix 13: Interview Consent Form



For Administrative Use Only	
Participant Code	

Interview Consent Form

Research project title (preliminary): Sustainable tourism in post-pandemic rural Scotland: Orkney strategy evaluation case study

Research aim: The purpose of this PhD research is to evaluate the sustainable tourism strategy in Orkney and identify the success criteria for its implementation in a post-pandemic outlook.

The research will look at Orkney Tourism Strategy 2025 development and implementation in post-pandemic reality and aim to provide recommendations for future strategies in Orkney, as well as other destinations based on this case study.

Purpose of the interview: This interview is conducted as a part of the main data collection phase, and is aimed to understand a stakeholder's perspective on sustainability in Orkney tourism, success in Orkney Tourism Strategy 2025 implementation and the strategy development process.

Format on an interview: The conversation will take form of a semi-structured interview with duration of approximately 60 minutes. The interview will be conducted on Zoom and will be recorded.

Research investigator: Alona Roitershtein

Research supervisor: Dr Rachael Ironside

Dear Participant,

Thank you for agreeing to contribute to this research project. Ethical procedures for academic research undertaken in UK institutions require that interviewees explicitly agree to being interviewed and how the information contained in their interview will be used. This information is protected by the General Data Protection Regulation EU 2016/679 (GDPR), which is implemented in the UK by Data Protection Act 2018.

This consent form is necessary for us to ensure that you understand the purpose of your involvement and that you agree to the conditions of your participation. Therefore, please read the statements on the next page of this document and indicate Yes/No for each.

General:

Statement	Yes	No
I confirm that I have read and understood the purpose of this interview and have had the opportunity to ask questions.		
I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason and without there being any negative consequences.		
I understand that should I not wish to answer any particular question or questions, I am free to decline.		
I understand that any variation of the conditions in this form will only occur with my further explicit approval.		
I would like to receive the results of the research in form of executive summary or full thesis.		

Anonymity and Confidentiality:

Statement	Yes	No
I agree that my organisation's name will be published in the research output(s).		
I agree that my position in the organisation will be published in the research output(s).		
I agree that my name will be published in the research output(s).		
I understand that if I answered 'No' to any of the above statements in this section, this information will not be linked with the research materials and will not be identified or identifiable in the research output(s).		

Data Collection and Usage:

Statement	Yes	No
I agree for the interview to be audio and video recorded and a transcript to be produced, using auto-transcription services.		
I agree for my responses to be directly quoted in the research output(s), in line with the Anonymity and Confidentiality consent provided above.		
I understand that I can request to review transcripts and direct quotes used in the research output prior to publication.		
I agree that the data collected during the interview will be kept for future research purposes such as publications related to this study after the completion of the project, and used according to Anonymity and Confidentiality consent provided above.		

For Administrative Use Only	
Participant Code	

I agree to participate in the research project, as per the conditions above.

Name: _____

Signature: _____

Date: _____

Contact information:

If you have any further questions or concerns regarding this project, please contact:

Research investigator:

Alona Roitershtein

School of Creative and Cultural Business

Robert Gordon University

email: o.roitershtein@rgu.ac.uk

Research supervisor:

Dr Rachael Ironside

School of Creative and Cultural Business

Robert Gordon University

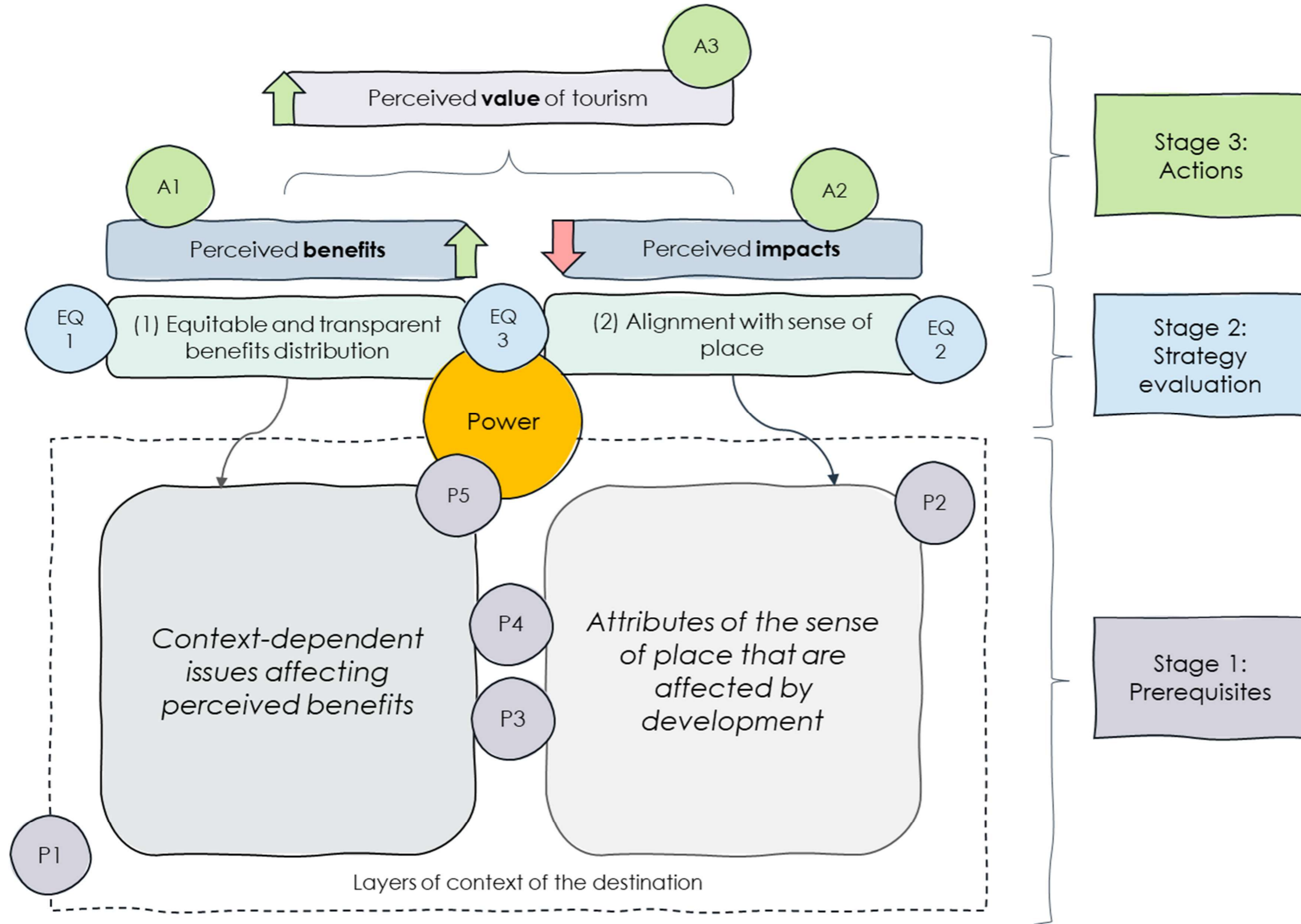
email: r.j.ironside@rgu.ac.uk

Appendix 14: Imagery used in the Strategy

Page	Image	Location	Notes
1	Puffins	Unknown	
1	Ring of Brodgar	The Mainland	
2-3	Ring of Brodgar	The Mainland	
4	Churchill barriers	Lamb Holm/Glimps Holm	
5	Tresness beach	Sanday	
6	Hatston Pier, Kirkwall	The Mainland	
7	Kirkwall airport	The Mainland	The picture refers to inter-islands flight
8	Skara Brae	The Mainland	
9	Yesnaby	The Mainland	Less well-known angle
9	Seal	Unknown	
10-11	St Magnus Cathedral	The Mainland	
12	Stromness	The Mainland	
13	The Italian Chapel	Lamb Holm	
14	Maeshowe	The Mainland	
15	Otter	Unknown	
16	Stones of Stennes	The Mainland	
17	The Italian Chapel	Lamb Holm	
18	Cormorant	Unknown	
19	Fursbreck Pottery	The Mainland	The only photo with the local resident
19	Stones of Stennes	The Mainland	

Appendix 15: Place-based Strategy Evaluation Framework (PSEF)

Page 1 - Overview



Stage 1: Prerequisites

P1

Determine the base layers of context

Method

Layers of Context (LoC) model
Desk-based academic and industry research on each layer

Apply SWOT or PESTEL for each layer to your destination



Data to collect

1. Establish how these layers affect the destination
2. What are the challenges?
3. What are the opportunities?

P2

Understand the attributes of sense of place

Method

Qualitative conversations with different **communities** in your destination (interviews, focus groups, participatory methods).



Data to collect

1. What their place means for them, what do they like about it and what they do not (place attachment)?
2. How they identify with the place (human-centred place identity)?
3. How they view the place (place-centred place identity)?
4. What do they think sustainability means for their place, and why?

P3

Understand the perception of benefits of tourism

Method

Qualitative conversations with different **communities** in your destination (interviews, focus groups, participatory methods).



Data to collect

1. What do they think the current benefits of tourism are for their place, and why?
2. What success in tourism means for them long-term, and why?

P4

Understand the perception of impacts of tourism

Method

Qualitative conversations with different **communities** in your destination (interviews, focus groups, participatory methods).



Data to collect

1. What do they think the current negative impacts of tourism are for their place, and why?
2. What do they think are the barriers for more valuable and sustainable tourism?

P5

Understand the governance and power

Method

Critical and unbiased **review** of the destination's **governance** structure and stakeholders with **power** and **agency**




Data to collect

1. Who has the ultimate power to make placemaking decisions in your place?
2. Who has the appropriate resources to implement actions for sustainability transition?
3. What their perception of tourism benefits and impacts is?
4. Does it align with the perceptions, expressed by the communities? If not, why?

The methods for steps P1-P5 should be decided by the destination, relevant to their context, resources and expertise.

Stage 2: Strategy evaluation

More questions can be added based on the contextual needs and requirements of the place 

EQ1

Does the strategy address the need for equitable and transparent tourism **benefits** distribution?

1. Does the strategy address residents' concerns regarding tourism benefits?
2. Does the strategy make it clear how tourism benefits are distributed?
3. What are the barriers for equitable and transparent benefits distribution?

EQ2

Does the strategy address the need for the alignment of the strategic direction of tourism development with the **sense of place**?


1. Do the objectives of the strategy align with the attributes of the residents' sense of place?
2. Does the place representation in the strategy (imagery, narrative) reflect the place identity as experienced by residents?

EQ3

Whose **value** the chosen strategic direction reflects?

1. What benefits are explicitly stated in the strategy?
2. Who is a direct recipient of these benefits?
3. Is it clear what is the value of the development beyond economic growth and benefit to businesses and visitors?

Stage 3: Actions

Specific place-based actions will be determined following the strategy evaluation. This is a general guidance only 

A1

Increase perceived benefits

1. Ensure **transparency** in communicating the tangible benefits from tourism to the wider destination (beyond businesses). E.g. Where do the public sector profits are reinvested?
2. Ensure the strategy recognises the **diversity** of needs/expected benefits across the destination
3. Ensure this recognition is followed by **action** (e.g. investment in infrastructure)

A2

Reduce perceived costs/negative impacts

1. Ensure the strategic plan for development is **aligned** with the sense of place of residents **across the destination** (e.g. tourism infrastructure sensitive to natural landscape, tourism activities sensitive to local culture, avoid increase in visitors to communities that do not want it).
2. **Transparently** communicate impact assessment to communities

A3

Inclusively work to increase shared value

1. Clearly state in the strategy how **communities** (in addition to businesses and visitors) will benefit from the strategic direction
2. **Distribute** decision-making power to affected communities to ensure **inclusive** and holistic value reflection
3. Encourage not only consultation, but active **participation** in development