Coastal community voices: strategic planning for sustainable destination development in a small cold-water archipelago.

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Coastal community voices: strategic planning for sustainable destination development in a small cold-water archipelago

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ABSTRACT

Orkney Islands is a popular cold-water archipelago destination for cruise tourism and other marine and coastal tourism activities, where visitor economy plays a key part in the economic development of the islands. However, Orkney's coastal communities are facing many sustainability challenges, directly related to tourism activities, as well as impacted by wider processes in the region and beyond. Therefore, tourism decision-makers are tasked with addressing the sustainability needs of communities in the archipelago, in their efforts to implement a transition towards sustainable future of Orkney as a destination. In the tourism sector, the framework for this transition is the Orkney Tourism Strategy. The aim of this paper is to explore the sustainability needs of Orkney, as defined by members of its local communities in the context of tourism development, to consider how these needs may influence successful tourism strategy development. Employing a qualitative multi-method case study methodology, this study identifies the importance and relevance of sense of place in determining the sustainability needs of communities. It is argued that tourism development initiatives, especially in small coastal communities, will benefit from an analysis of layers of context to produce meaningful tourism strategies.

Introduction

Coastal communities worldwide face many sustainability challenges, driven by a variety of globalised and localised processes, such as climate change, economic restructuring and migration (Baxter et al., 2022; Evans et al., 2023; Schreiber et al., 2020; Walshe & Stancioff, 2018). While many studies have been conducted on tourism in islands, the majority are situated in the context of warm-water, tropical "paradise" destinations, where the contextual features and sustainability needs are notably different from their cold-water counterparts (Baldacchino, 2006b; Jóhannesson et al., 2010; Renfors, 2021). It was therefore deemed important to contribute to addressing this gap by conducting a doctoral study on sustainable tourism strategy evaluation in the Orkney Islands – a

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small cold-water archipelago in the north of Scotland. This paper presents a part of this study, concentrating on the voices of coastal communities in defining sustainability needs in their transition towards sustainability, framed by the layers of context, applicable to Orkney as a tourism destination.

Orkney Islands is a popular destination for cruise tourism and other tourism activities, where visitor economy plays a key part in the economic development of the islands (Fraser of Allander Institute [FAI], 2020). However, Orkney's coastal communities are facing many sustainability challenges, directly related to tourism activities, as well as impacted by wider processes in the region and beyond (Staiano et al., 2020). Therefore, tourism decision-makers are tasked with understanding and addressing the sustainability needs of communities in the archipelago, in their efforts to implement a transition towards ensuring Orkney has a sustainable future. In the tourism sector, the framework for this transition is the Orkney Tourism Strategy 2020–2030[1] (Destination Orkney Partnership [DOP], 2022), which is part of wider strategic planning processes for sustainable futures on local, regional and national levels.

The aim of this paper is to explore the sustainability needs[2] of Orkney, as defined by members of its local communities in the context of tourism development. The purpose of this exploration is to determine to what extent the Strategy meets those needs, as a tourism framework for developing resilient futures of Orkney and its communities. This paper contributes to the theories of place and strategic planning, by utilising the benefits of the former to ensure the latter is applicable to unique contextual circumstances of each destination. Particularly, the contribution of this study is to the field of island and archipelago studies, especially in the cold-water context. This paper also provides a foundation for the practical contribution of the place-based strategy evaluation framework, developed in the main PhD study (Roitershtein, 2024).

Coastal communities through the layers of context

The contextual environment of coastal communities can be looked at through the layers of context (Figure 1), which create a specific set of circumstances, affecting the sustainability needs and therefore the strategic planning for sustainable development (Roitershtein, 2024).

These layers include rural setting, island and archipelagic nature, with additional attributes, brought by their cold-water location, and can be seen in a certain hierarchy, from the wider geographical perspective (rural) to the more specific geographical context (cold water). While many of the characteristics, determined by these "external" or "base" layers, are common between all rural cold-water island and archipelago destinations, each of these layers, in combination with others (or when is "looked through" the combination of these layers), will manifest differently in each locality, creating the unique set of circumstances that shape the definition of "islandness" (Baldacchino, 2005; Grydehøj, 2017; Stratford et al., 2011) in each destination. These unique circumstances have the potential to influence the sustainability needs of these islands and its communities. Therefore, the last, "internal" or "unique", layer will be different in each case, allowing for the internal perspective on the sustainability needs, pertinent to the local communities. This unique layer of Orkney Islands is being discussed in this paper, following the introduction of the applicable "base" layers.
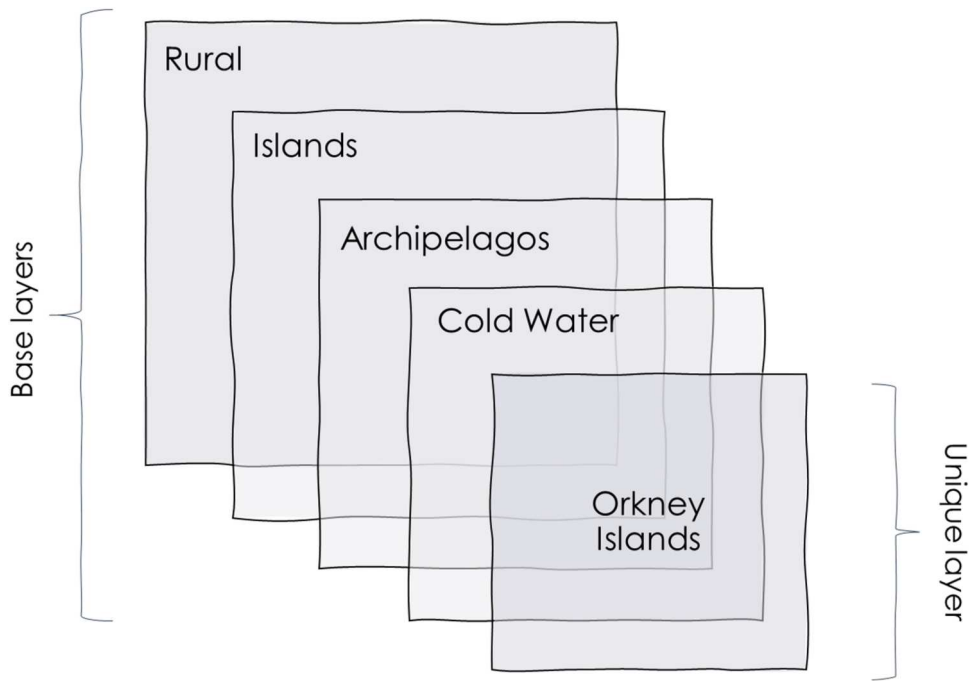
Figure 1. Layers of context (Roitershtein, 2024, p. 31).

Tourism is seen as one of the solutions to sustain rural communities in times of change, where rural areas transition from place of production to place of consumption (McAreavey & McDonagh, 2011; Ploeg & Marsden, 2008). The departure from traditional industries creates a sense of nostalgia, shaping perceptions of rural areas as idyllic, free, wholesome and authentic, where romanticising the countryside becomes one of the tools to encourage visitors and new residents to these areas (Panzer-Krause, 2020; Shucksmith, 2018). Such an approach often eclipses the real picture of the rural life, where issues such as lack of working population, gentrification, poverty and property crisis may occur (see Brown, 2012; Casini et al., 2021; Christiaanse, 2020; Shucksmith & Rønningen, 2011; van Auken & Rye, 2011).

The "islands" layer of context creates an even more complex situation, whereby the romanticised picture of island life, infused by the element of *crossing*, promising to transport us to the place where everything is calmer and slower (Baldacchino, 2021; Carlsen & Butler, 2011), exacerbates the challenges faced by other rural communities. This crossing means that the use of carbon-intensive modes of transportation, such as planes, cruise ships and ferries, is inevitable (Armstrong & Read, 2021). The dependence on weather, seasons and other natural processes is omnipresent, and seen as one of the constructs of *islandness*, where coastal communities must exercise resilience, tolerance and trust in fellow community members to exist in such places (Conkling, 2007). These issues are even more prominent in archipelagos, where the element of crossing is multiplied beyond the main island.

The fact that there is a *mainland* as a reference point within the archipelago, in addition to mainland on the continent or the "parent" country, adds another layer of complexity

(Baldacchino, 2004; Baldacchino, 2015a). This complexity lies in the "multiple peripheral-ity" attribute (Spilanis et al., 2012, p. 202), where peripherality is effective not only between the archipelago and its mainland but also in and between the islands of the archipelago itself, creating unique power dynamics and centre-periphery relationships (Favole & Giordana, 2018; Pugh, 2018; Stratford et al., 2011). This in turn causes deterioration in some elements of island life in smaller islands, while straining the resources and infrastructure on the larger, main island (Baldacchino, 2015a). Such a contextual feature of archipelagos has a direct effect on sustainability of its communities.

The cold-water context, in turn, determines to what extent such development can take place, especially in tourism. Setting these destinations apart from its warm-water counter-parts, this context dictates the type of visitors that come to the archipelago, the reason for their visit and the length of stay, as well as patterns of seasonality and levels of unpredict-ability and dependency on natural environment. This context challenges tourism development with concepts such as carrying capacity, seasonality and distance decay (Agius & Briguglio, 2021). It is also argued that such destinations are often home to small communities, not particularly interested in developing tourism (Baldacchino, 2006b), since their primary occupation is harnessing the sea and the land, so abundant in their lives. However, while this might be true for some of these destinations, others find themselves attracting large numbers of visitors, thus creating a tension between the need to preserve their pristine and fragile nature and way of life, and diversifying income and population to remain sustainable.

The last layer of context, as illustrated in Figure 1, represents the unique circumstances of each destination that play an instrumental role in defining its unique sustainability needs. It is formed through interaction between physical space (here rural cold-water archipelago) and its people. This interaction endows a space with value, creating the *place* (Tuan, 1977), shaping the *sense of place*, based on the meaning people give to the physical setting (Stedman, 2003). Sense of place is often shaped by a variety of attributes, such as physical and social characteristics of a place, influenced by the place attachment, place identity and other factors, such as place dependency and place satisfaction (see Mulvaney et al., 2020; Soini et al., 2012; Stedman, 2003, 2006). Alignment of development to the attributes of the sense of place, experienced by individuals and communities, influence their perceptions of, attitudes to and engagement in tourism development (Chen et al., 2021; Mulvaney et al., 2020; Shamai, 1991); thus shaping how sustainability needs are defined in each destination. As explored in this paper, a strong sense of place, experienced by members of Orkney communities (Roitershtein, 2024), plays a key role in the perception of sustainability in Orkney tourism development.

Tourism and coastal communities in cold-water archipelagos

Coastal and marine tourism plays a key part in the economy of small coastal communities, and it "constitutes approximately 50% of all global tourism, equal to US$4.6 trillion or 5.2 percent of global gross domestic product (GDP)" (Northrop et al., 2022, p. 2). Inevitably, however, growth in tourism brings about challenges to small coastal destinations. The literature has extensively addressed the sustainability of island communities worldwide, reliant on tourism, emphasising the issues of overreliance on the sector in their economies (Graci & Dodds, 2012; Lockhart, 1997), leading to drastic change of landscapes to

accommodate infrastructure and facilities for visitors (Carlsen & Butler, 2011), and putting strain on local resources, such as water and waste management (Creaney & Niewiadomski, 2016). The issues are often exacerbated by the climate change impact on natural environments and small coastal communities (Armstrong & Read, 2021; Nunkoo et al., 2010). However, as argued by Walshe and Stancioff (2018), the frequently used term "vulnerable" in the context of small island destinations and communities is simplistic and misleading, as many of these communities have proven their ability to be resilient and lead the way to a positive change.

While some of the above challenges will be applicable to cold-water destinations, as noted by James et al. (2020, in cruise context) and Renfors (2021), the challenges in cold-water areas are distinct from those observed in warm-water islands. This may be due to the remoteness, weather and inhospitable environments, and limited infrastructure to support a growing number of visitors. Addressing these, to an extent, is the literature set in Arctic and Nordic regions, with topics such as sustainability, climate change, stakeholder perceptions and cruise tourism at its forefront in recent years (see Dimitrovski et al., 2021; Hall & Saarinen, 2021; James et al., 2020; Plieninger et al., 2018). While many of the issues raised in these publications are relevant to cold-water islands and archipelago destinations, literature mentioning this context specifically is less prominent, albeit growing. Baldacchino (2006a) reviewed the existent literature to date and argued that interest in cold-water islands and archipelagos is lacking; however, several publications have been developed since then (Baldacchino, 2015b; Creaney & Niewiadomski, 2016; Graham, 2020; Jóhannesson et al., 2010; Renfors, 2021).

The growth in publications corresponds to the growth in the wider tourism sector, where cold-water destinations are becoming increasingly popular among travellers, seeking experiences, different from those offered to the mass tourism market which usually attracts visitors to warm-water islands (Butler, 2006). It is argued that, while different across each destination, cold-water archipelagos attract affluent visitors, who expect expedition, rather than relaxation, and express an interest in nature, culture and seeking adventure (Baldacchino, 2006b). While there is no overall statistics stating tourism contribution to cold-water archipelago communities specifically, it can be seen from the regional figures that this contribution is significant. For example, tourism in the Faroe Islands contributed around DKK 900M in 2022 (Visit Faroe Islands, 2023) and Åland saw income of EUR 420M in 2019 (Visit Finland, n.d.). By travelling to cold-water destinations, visitors seek experiences, specific to these destinations, with deliberate motivation to overcome the cost and duration of travel, weather and other challenges to experience the inherent features of the islands, such as nature and wildlife, history and traditional practices (Butler, 2006).

With the growth of tourism, many of the cold-water islands and archipelagos experience pressures, resulting in sustainability issues, and fuelling negative attitudes towards tourism development. The main driver for negative attitudes is the impact of large visitor numbers on landscape values, uncontrolled access to private and protected land and interference with the local way of life (Plieninger et al., 2018). Moreover, in archipelago communities, a higher value is placed on the whole of the archipelago, regardless of the place of residence (Plieninger et al., 2018). It can be argued that this attribute of archipelago rooted in a stronger sense of place, and therefore stronger perceptions of negative impacts. This adds another contextual feature of archipelago destinations, and another challenge in tourism development.

The study on stakeholder views on cruise tourism impacts in cold-water destinations by James et al. (2020) reveals several interesting conclusions. It emphasises that the overall impact of cruise tourism is perceived within the boundaries of the destination itself, omitting the impact on wider environment outwith the port of call, such as discussed by Brida and Zapata (2010) and addressed by European Commission (2023). It also notes the perceived higher value of non-cruise visitors, compared to cruise visitors, and the concerns that higher number, low value cruise visitors have a negative impact on tourist experience in contrast to the non-cruise, higher value visitors, thus exacerbating the overall negative attitudes (James et al., 2020).

Specifically in the cold-water archipelago context, additional issues can be found, in cruise and other forms of tourism to the islands. Baldacchino and Ferreira (2013) discuss the dispersal of visitors around the islands of an archipelago, to avoid strain on main island resources, often acting as the central transportation hub in a hub-and-spoke system. The authors note the challenges in such endeavours, due to lack of infrastructure on the smaller islands to accommodate visitors (Baldacchino & Ferreira, 2013). If this is not done properly, the concentration of visitors in the main island can exacerbate power imbalance between the islands and unequitable distribution of the benefits, increasing disparity between the islands (Baldacchino, 2015a; Butler, 2016).

To overcome the challenges and realise the benefits of tourism development, many destinations produce sustainable tourism strategies, which are used to lead the way towards the desired vision and objectives. The importance of tourism strategy for transition towards sustainable futures is widely recognised, due to the very nature of sustainability as a concept, aimed at long-term solutions and a forward-looking approach, which requires strategic vision for its realisation (Hall, 2000; Simpson, 2001). In tourism, strategic planning is seen as a key tool to ensure its development is sustainable, and able to factor in the complexity of the sector, diverse views and opinions and multitude of stakeholders involved (Lane, 1994; Simpson, 2001). To be useful and relevant, however, strategic planning must recognise the specific sustainability needs of the destination, determined by its stakeholders (Haid et al., 2021) and shaped by its context and environmental, social, cultural and political circumstances (Renfors, 2021). Understanding the context will lead to place-based, value-driven development, required for it to be sustainable (Chapin & Knapp, 2015; Horlings, 2015).

Methodology

To address the aim of this study, a multi-method qualitative case study was conducted. The case study was guided by pragmatism and interpretivism (Goldkuhl, 2012), aiming not only to understand and interpret the experiences of the participants for knowledge creation but also to use this knowledge to provide a practical solution to a real-world problem (Veal, 2017). A single-case study was chosen, to understand the unique layer of context and its attributes, for "every island is unique" (Baldacchino, 2006b, p. 186).

Thirty-one interviews were conducted with 32 participants, 30 of whom are members of Orkney communities (29 interviews).[3] Table 1 provides the overview of the participants.

The participants were sampled purposefully, to ensure views of as many types of stakeholders are noted; however, an element of snowball sampling was added, where participants were asked to recommend other members of Orkney community, who would be willing to contribute. It was decided not to disclose any identifiable attributes of the

Table 1. Study participants (Roitershtein, 2024, p. 119).

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

participants in research outputs, thus only the place of residence, occupation and degree of involvement in tourism industry are displayed in Table 1. Due to specific informed consent requirements of some participants, and in the interest of anonymity in the context of small and engaged community in Orkney, all responses were assigned a code (MI-01, MI-02, etc.). These undertakings were reviewed and approved as per the procedures of the institution, where the doctoral study was conducted. In general, the local participants resided in Orkney Mainland (77%) and other islands (23%), and 90% were directly or indirectly involved in tourism industry. 60% of the participants moved to Orkney from elsewhere, whereas 40% were of Native Orcadian origin.

In the wider doctoral study, on which this paper is based, a conceptual framework was devised, leading to an array of questions, to guide the semi-structured interviews. In the context of the part of the study, presented in this paper, two interview questions were pertinent; however, information from other responses was also used, where applicable. These are:

(1) What do you think sustainability is, and what are Orkney's sustainability needs, in tourism context and overall?
(2) What does success in the Strategy implementation means, and what are the success factors?

Twenty-six out of 29 interviews were conducted on Zoom/MS Teams, due to ongoing COVID-19 restrictions during the main data collection period. An additional three interviews

were conducted in-person during the second field trip in July 2022, when the restrictions allowed travel. The interviews were recorded electronically, with video and audio recorded during online interviews, and audio only during the face-to-face interviews. An informed consent was obtained from each participant to record, transcribe, quote and use the gathered data. All interviews were transcribed and added to NVivo database for analysis.

In addition, two unstructured observations (Mulhall, 2003) were conducted, before the interviews and at the end of primary data collection. The primary objective of the observations was to enrich the understanding of the studied subject and illustrate data gathered via interviews (Veal, 2017; Yin, 2018). It was also important to understand the context, the physical environment and develop geographical orientation in the archipelago, to assist with the conversations with participants. The data gathered during observations was in form of photography and extensive field notes, written by the first researcher based on the photographs, guided by principles of digital ethnography (Pink et al., 2016) and field-notetaking (Basil, 2011; Mulhall, 2003). The resulting photographs and field notes were also added to the data repository in NVivo, where the data analysis took place.

In NVivo, the data from all sources (interview transcripts, field notes and photographs) was coded inductively (Corbin & Strauss, 2008) and emergent themes were identified (Veal, 2017). This allowed the researchers to perform "triangulation", where data from multiple sources is gathered and analysed, to increase validity and reliability of the conclusions (Yin, 2018). The large list of inductively created codes was then reviewed and coded-on where applicable. From the resulting codes and the relationship between them, the main themes were identified for the purpose of the main doctoral study at the basis of this paper (Roitershtein, 2024). The three main themes, discussed in the main study, are (1) sense of place, (2) placemaking and (3) value. The results and analysis, presented in this paper, draw on these main themes to present the sustainability needs of Orkney, as defined by members of its local communities in the context of tourism development.

Case study – Orkney Islands, Scotland

Orkney Islands is an archipelago of 70 islands (Figure 2), approximately 20 of which are inhabited, covering 990 km^2 of land, and is the smallest local authority area in Scotland (Heddle et al., 2021). It is located around 10 miles north of mainland Scotland, across Pentland Firth, and can be reached via several ferry routes and direct flight from a number of airports in Scotland and nearby countries. Orkney is home for over 22,500 people, and circa 75% of the residents live on the main island – Orkney Mainland (National Records of Scotland, 2021). The community of Orkney Islands is diverse and includes native Orcadians and incomers from other parts of the UK, predominantly England (National Records of Scotland, 2015). While such diverse community brings many benefits for the islands, it means that there will inevitably be differences in opinions as to what is sustainable for the destination in terms of development, including in its tourism sector.

The unique geographical location of the archipelago, between the Atlantic and North Sea, and longstanding farming and agricultural way of life, created distinctive landscapes, with rolling treeless hills and plains, rugged coastline that provides home to an exceptional variety of birds, sea stacks and vast beaches. Orkney is also home to heritage sites of global importance, including UNESCO WHS Heart of Neolithic Orkney, enriched by the abundant folklore and storytelling culture (Ironside & Massie, 2020). Other sites

Figure 2. Orkney Islands map.

dating back to Neolithic, Bronze and Viking ages are scattered in unprecedented quantities across all islands of the archipelago, creating an exclusive historical environment, which to this day shapes the character and culture of Orkney and its communities, and provides an opportunity for visitors to deeply engage with it.

The tourism sector in Orkney is recognised as a significant contributor to the economy of the islands, with an estimated £67M annual worth, brought by "independent" visitors, and all tourism-related activities represent 10% of overall employment, compared to 8.3% in

Scotland (FAI, 2020). "Volume" tourism also constitutes a significant portion of Orkney tourism. These types of visitors, as opposed to their "independent" counterparts mentioned above, are those arriving on daytrips by cruise or ferry-to-coach tours from Scotland.

Sustainability challenges of Orkney tourism

Cruise is a major feature of Orkney's tourism industry, with Orkney being the most popular cruise destination in the UK (Orkney Harbour Authority, n.d.). It is estimated that in 2019 132,000 cruise passengers and 50,000 crew visited Orkney on board 156 cruise ships, and 28,000 other day visitors (DOP, 2022). With around 46% of all visitors coming by cruise (DOP, 2022), this sector of tourism is the most controversial aspect of the industry on the islands (Brocklehurst, 2017; Orkney Islands Council, 2021; Taylor Nisbet ltd., 2020; The Herald, 2017).

The environmental impact of cruise tourism is a major concern globally (Brida & Zapata, 2010; Carić & Mackelworth, 2014; Hovelsrud et al., 2021) and in Orkney as well. Despite Orkney being in the North Sea Emission Control Area (ECS), permitting only low sulphur vessels operating in the port, as well as Ballast Water Management Policy regulating the ballast water discharge in some areas of Orkney waters, environmental worry regarding the cruise arrivals is extensive. The large ships (largest, such as MSC Meraviglia, carries up to 5000 passengers) in large quantities (204 arrived in 2023; Orkney Harbour Authority, 2023) make a significant environmental impact, with no technology yet available to provide shore power for larger ships.

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, n.d.). Large numbers of people disembarking from the cruise ships in Kirkwall for a short period of time are flooding the town, often causing road closures and congestions. Carrying capacity problems in main historical and natural sites in the Orkney Mainland, such as Ring of Brodgar, Skara Brae and St Magnus Cathedral in Kirkwall, are also recognised. Many of these sites are uncontrolled by ticketing or other visitor management activity, causing negative environmental impact, peaking in July–August (DOP, 2022; Staiano et al., 2020). This includes the UNESCO sites, which are vulnerable to physical impacts, such as coastal erosion and visitor footfall (UNESCO, 1999). Figure 3 illustrates the situation.

But it is not only cruise tourism that causes concerns, as was confirmed in this study. Like many other destinations in Scotland, additional carrying capacity challenges are recognised in uncontrolled parking areas, this time caused by independent visitors, especially those travelling by campervans. These are exacerbated by insufficient facilities for waste disposal and traffic congestions, as well as inappropriate parking on sensitive areas, such as beaches and dunes. Other infrastructure and facilities challenges are recognised as well, such as narrow roads, limited car parking and the lack of toilets in some areas, insufficient vehicle capacity on inter-island ferries and their reliability.

Orkney Tourism Strategy 2020–2030

To address the challenges and maximise the benefits of tourism development, Orkney Tourism Strategy 2025 was launched in early 2020, with the vision; "By 2025, Orkney will be a world-class sustainable destination enriching the lives of its people and visitors".

Figure 3. Path condition at Ring of Brodgar (authors).

Following the COVID-19 pandemic, the Strategy was reviewed and in August 2022 the updated version was launched – Orkney Tourism Strategy 2020–2030, with the similar vision, albeit extended to 2030, and updated objectives (DOP, 2022, p. 5).

The revised objectives of the Strategy aim to increase the prosperity of the islands, responsible visitor management to improve quality of experience for visitors and residents, resources and infrastructure development, increased community benefits and mitigation of climate change impacts (DOP, 2022). The document also emphasises a "cross-islands" approach, to ensure communities across the archipelago benefit from tourism and able to inform decision-making. The strategy emphasises social and environmental sustainability considerations, which are set to underpin all tourism development (DOP, 2022).

Results

The results, presented in this section, reflect the insight, obtained from the Orkney participants, therefore the narrative in this section is supported by extracts from the interviews. The results show that the sense of place, framed by Orkney's layers of context and experienced by Orkney people is at the basis of the perception of impacts and benefits of tourism (or tourism *value*), and it is an alignment with the sense of place that is sought by local communities in the Strategy. This alignment is, therefore, the main *sustainability need*, as will be discussed below. While an in-depth analysis of sense of place constructs is not within the scope of this paper (see Roitershtein, 2024), its attributes are at the basis of the following discussion, which begins with the identification of the main sustainability challenges, perceived by the community members.

Community perceived sustainability challenges

Throughout the interviews and observations, it was evident that many of the participants are aware of the challenges that tourism poses to their place and communities, whereby some of

the challenges are recognised by most, and some are more important to a certain group of Orkney residents, as also argued by Deery et al. (2012) elsewhere. For example, the dichotomy between independent and volume visitors was recognised more acutely by participants, engaged in tourism provision for the independent visitor market, also noted by James et al. (2020) and Ren et al. (2021) in other cruise destinations. One participant remarked:

> And nobody has ever addressed the serious dichotomy we're having here in Orkney between independent visitors and day trippers [volume visitors]. 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)

On the other hand, those who engage with tourism provision to the volume tourism market, regard the challenge as less acute:

> 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)

In addition to the impact on business and economy (positive or negative), the majority of participants reflected on the environmental impact of tourism on the Orkney Islands. As such, acknowledging the wider impacts of cruise industry worldwide, most of the participants expressed concerns in relation to Orkney specifically, in line with James et al. (2020). One participant commented on environmental impact of cruise vessels on Orkney air and marine environment:

> 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)

Such strong opinions of the environmental impact of tourism, cruise in particular, was noted mainly by those who do not benefit directly from the industry, as illustrated by the quote above. Moreover, while the environmental impact on air and water was acknowledged by some, it is the onshore operations that trigger major debates across the community in Orkney:

> […] you have a very high footfall and then you have a lot of damage to sensitive areas, archaeological sites, but perhaps the wildlife as well. And you have a lot of disturbance for seals, for example, or like a Scottish primrose or people walking on sensitive areas. Do you really want the heavy footfall? (MI-10)

These contested arguments by the members of Orkney communities with regard to cruise tourism allude to the varied and complex people-place relationship, at the basis of Orkney's unique layer of context (Figure 1). On the one hand, some regard cruise as supportive of the social attributes of Orkney, such as economic contribution to the local businesses, and consumption of high-quality local produce (Brig Larder reference above). These are seen in a more positive light among those who value these attributes of Orkney higher than physical attributes. On the other hand, those valuing the physical attributes (such as landscape and environment), and who do not benefit from cruise

directly, regard the negative impacts on the environment as more prominent, and thus place lower value on the potential benefits. The apparent distinction between social and physical attributes at the basis of residents' sense of place, seen in Orkney, supports previous studies (Campelo et al., 2014; Lecompte et al., 2017) and provides further insight into people–place relationship and their unique manifestation in each community.

To further support this discussion, some negative perception of independent visitors was also prominent, mostly among those whose *place* is affected by the changes, brought about by the increase in tourism:

> I don't know if it was directly related to the pandemic, but basically one of the beaches that I take my dog to has a nice sand dune system that's been completely trashed by campervans. (MI-19)

It can be seen here that the perception of negative impact is stronger when tourism is affecting the most valuable sense of place attributes, in this case the environmental features of the place, such as "a nice sand dune system" (MI-19), particularly treasured by this participant. Looking through the layers of context, discussed earlier, such relationship between this participant and their place stems from the value they assign to the natural and physical features of their place, leading to the negative perception of impact, when this attribute is interrupted (in this case, by campervans).

Overall, according to the participants, to address the environmental challenges, there is a need for development and maintenance of appropriate tourism and transport infrastructure across the islands, which will help to manage and disperse the visitors from the most popular sites. However, and in line with Bardolet and Sheldon (2008) and Orkney's archipelago layer of context, many also stated that currently there is a notable underinvestment in infrastructure on the outer islands of the archipelago, and this disparity causes not only difficulty dispersing visitors but also benefits from tourism overall.

Perception of tourism benefits and impacts

This disparity in infrastructure, investment and tourism development between Orkney Mainland and other islands of Orkney archipelago, brought to light the topic of benefits, emphasising that this disparity causes unequitable benefits distribution. Looking through the "archipelago" layer of context, the issue of benefits distribution exacerbates the differences between the islands, causing further sustainability challenges for the more remote communities in Orkney. This difference between Orkney Mainland and other islands was described by a participant:

> The landscape is different. And I'm not talking about the physical landscape, talking about like the infrastructure landscape, the services available, the protections available, […] the sustainable mitigations you might have. (MI-10)

The lack of appropriate infrastructure creates dispersal challenges, where quite often ferry-connected islands are not on the itinerary of many tourists, especially "volume" visitors, due to lack of time, additional costs and higher dependency on weather conditions, in addition to the infrastructure issues.

> But then when you step away from mainland Orkney, that conversation [about benefits and impacts of tourism] is completely almost irrelevant because that huge income that comes into Orkney is not spread very far. (MI-09)

This income, including income from harbour dues and fees, is not tangibly manifested in community benefits, as noted by most participants. The legal aspects of reinvestment of income from harbours only into harbours themselves[4] are seen by some as a barrier to more equitable benefits distribution, where the impacts of tourism (cruise in particular) could be addressed by the revenues from cruise.

> 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)

However, according to the participants, many of the decisions on infrastructure investment and development are taken in Kirkwall (in Orkney Mainland), by organisations and agencies with power to decide how to distribute the benefits and investment strategy, often leaving other islands of the archipelago behind. Apart from benefits distribution, this situation creates tension between island communities and tourism governance, often responsible for centralisation of decision-making (Bardolet & Sheldon, 2008), including in its tourism strategy.

While the above situation affects the perception of tourism benefits across Orkney communities, it can be argued that the perception of the negative impacts is driven by the alignment of the results of the tourism activities with the sense of place of Orkney residents, as discussed previously. The residents, regardless of their origin and how long they have lived in the archipelago, are very passionate about their islands and have strong sense of place, reflecting the people-place relationship in the unique layer of context (Figure 1). For many, this is manifested in their attachment to the natural environment, the "big sky" (MI-23), vast views and quiet places, where they can have "a beach all to yourself" (MI-19) and no one disturbs their quiet way of life, so closely linked with this natural environment.

> […] 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)

Visitors in large numbers, therefore, are sometimes seen as a disturbance to community perceptions of the serene environment, with crowds, congestions and environmental impact all being seen as a threat to the essence of Orkney. Some fear that uncontrolled tourism development will bring about a "disneyfication" of Orkney, turning it to a theme park, in which the local character and uniqueness of its environment will be overrun by efforts to change what Orkney is, to suit visitors' needs (see Kennedy & Kingcome, 1998).

> 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)

From the above quote, it can be learnt that such impactful events and past grievances are deeply engrained in local memories, still affecting the perception of tourism several years after they occurred, alluding to the deep attachment of Orkney people to their place. This deep attachment of Orkney residents to their islands was prominent throughout the conversations, and the fear of losing the uniqueness, and the "essence of Orkney life" (MI-27), as felt by the residents, was notable. Looking through the "islands" layer of context, this is

aligned with the concept of *islandness*, embedded in island-born residents, incomers or those who left islands long ago, and their way of looking at the world (Baldacchino, 2004; Conkling, 2007; Ronström, 2011).

It was also argued that protecting the uniqueness of Orkney will not only align with the sense of place of residents but also protect the "geese that lay the golden egg" (MI-09), referring to the attractiveness of these attributes for potential visitors.

> [...] 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, but. And I think sustainability tourism has to be that we don't lose that or dilute that by what we do and that we actually see that as the end in itself as well. (MI-27)

Based on the above examples, it can be understood that the perception of challenges, posed by tourism, is driven by the relationship between perceived benefits, and the perceived negative impacts, which in turn constitute the perception of tourism *value* (Roitershtein, 2024). These perceptions stem from the attributes of the sense of place, experienced by the residents, underpinned by their relationship with Orkney as a place. This relationship, while it may have some similarities with other places, is unique for Orkney, and is shaped by the layers of context, affected by the challenges and opportunities brought by Orkney's geography (rural, island, archipelago, cold water).

Therefore, it is argued here that the value formula, as a proportionality of benefits and impacts, shaped by Orkney's layers of context, is at the basis of the sustainability needs of Orkney communities – where the main *need* is to increase the perception of tourism value, by increasing the benefits and reducing the impacts, as illustrated in Figure 4.

According to this notion, the alignment of tourism development with the community's sense of place will improve the perception of impacts. Additionally, an equitable and transparent benefits distribution will ensure a more positive perception of tourism benefits. Both constitute the overall sustainability need of Orkney communities – where the development of tourism (and any other placemaking activity) needs to be seen as valuable for Orkney as people and Orkney as place.
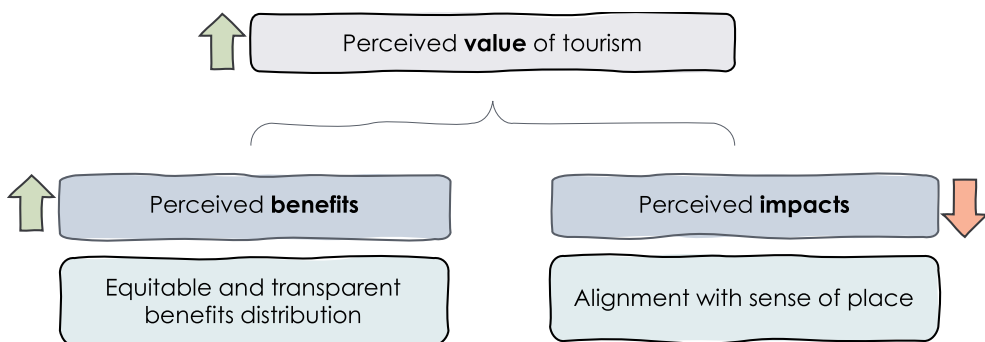

Figure 4. Increase in the perception of value as the main sustainability need (authors based on Roitershtein, 2024).

Discussion

The results, presented in this paper above, reveal that Orkney communities are engaged and have great awareness of tourism challenges, as well as opportunities, similar to many communities in rural and island destinations. It shows, however, that the perceptions of these challenges are often contested, driven by the perception of benefits and impacts of tourism, based on their alignment with the sense of place. This alignment will depend on several factors, pertinent to the unique circumstances of Orkney as a tourism destination, affected by the combination and unique manifestation of the applicable layers of context, and the relationship between these geographical features and the people who experience them. This relationship shapes the attributes of the sense of place (see also Renfors, 2021 and Campelo et al., 2014), experienced by the residents, and varies according to an array of factors, such as demographic attributes, place of origin (Roitershtein, 2024) and/or degree of dependency on certain tourism markets, as was demonstrated in this paper.

Like other rural cold-water archipelagos, Orkney is constituted from the complex inter-relationship of social, environmental and cultural attributes that contribute to its unique layer of context. These layers of context each present opportunities and challenges to Orkney, as a place to live and to visit. For local communities, tourism development can amplify these issues and, as this case study suggests, lead to sustainability concerns. The rural layer of context means that key attractions in Orkney, often located in rural, natural settings, struggle to support infrastructure and facility requirements for high tourism numbers. The results of this are perceived in the environmental degradation, apparent at key historical and ecological sites, the social impacts of volume tourism and a perceived cost–benefit imbalance for communities across the archipelago. Furthermore, the island and archipelago layers of context, such as small and mostly ferry-linked islands (unlike Faroe Islands, for example, where fixed links are established between many of its islands), with highly centralised and *powerful* main island, present additional challenges. These include equitable dispersal and investment, as well as achieving a balance between attracting visitors and providing sustainable transport options for both visitors and the community to move to and between the islands. Cold-water layer exacerbates the above by adding element of seasonality to tourism development, and higher dependency on weather conditions by the transport links, for both visitors and the community. For communities, these challenges often conflict with and disrupt their sense of place, whether it is perceived through its natural environment or its social and cultural attributes, manifested in uniquely Orkney way, constituting the unique layer of context (Figure 1).

The sense of place, in turn, affects the residents' perceptions of tourism development, where misalignment with the sense of place causes more negative perceptions of tourism (such as large volume of people affecting the empty landscapes). Yet, it was also learnt that the perception of benefits affects the overall perception of the value of tourism, where more tangible benefits (e.g. a playpark funded by cruise tourism, or tangible income for the local shops on the high street) can have stronger influence on the perception of tourism and sustainability challenges it brings (Nunkoo & Ramkissoon, 2011). Therefore, for the tourism strategy to be successful, as per the aim of this study, it must be aligned with the sense of place of Orkney residents and promote transparent and equitable benefits distribution across the archipelago and its communities. This

will meet the needs of the local communities and gain their support for the strategy and tourism development in Orkney.

Theoretical contribution

This paper presents a study that contributes to the place theory, in particular the notion of sense of place (Stedman, 2003), expanding its application to tourism development on a local level, as well as providing a pragmatic contribution to the field of strategic planning for sustainable development, which so far lacked local, place-based focus. As argued by Horlings (2015) and Chapin and Knapp (2015), place-based context-depended approach is necessary to ensure the development is sustainable. To organise this place-based approach to contextual study, it also introduces the Layers of Context model (Figure 1). Studying each contextual layer and their interaction, guided by the model, helped to ground the discussion in the contextual circumstances of the tourism destination, providing a helpful reference to rural, islands, archipelago and cold-water contexts. This helped to understand their unique manifestation in the destination and link the pragmatic geographical discussion to the inductive concept of sense of place, supporting the argument that it is rooted in the relationship between people and place in the given geography.

This study also showed that the alignment with the sense of place and equitable benefits distribution can provide a useful framework for successful local tourism strategies. It contributes to the knowledge on sustainability needs and tourism strategy development in rural cold-water archipelago destinations in particular, helping to bridge contextual gaps identified by Baldacchino (2006a, 2006b) and Stratford et al. (2011). It recognises sustainability needs, rooted in the alignment to the sense of place and equitable benefits distribution across the archipelago, highlighting the issues, such as centralisation and power imbalance, and the need for tourism strategies to provide more inclusive and relevant solutions for all the communities.

Uniqueness of each destination, despite the commonality of geographical context of cold-water archipelago, was confirmed here as well. As such, while Plieninger et al. (2018) in their study of Faroe Islands identified many similar needs, such as protection of local environment and culture, and better control of tourism, benefits distribution was not as prominent in Faroese case, potentially due to a better connectivity between the islands of their archipelago. Similarly, Renfors (2021) discussed residents' perceptions of tourism development in Finnish archipelago, identified context-specific sustainability needs, such as political landscape and second home ownership, which underpin unique tourism development circumstances in the archipelago. Moreover, James et al. (2020), comparing two small Arctic cruise destinations, conclude that despite many common features, the unique context of each destination formed context-dependent concerns and therefore sustainability needs. This reinforces the argument in favour of applying the layers of context approach (Figure 1) to study the relevant context and its unique form in a particular community and place.

This paper also contributes to the body of knowledge of the relationship between place, value and sustainability, as advocated by Grenni et al. (2020) and Horlings (2015). The qualitative approach of this study also adds to the field of residents' perception studies, dominated by quantitative methods (Deery et al., 2012; Sharpley, 2014). It helps to understand the reasons behind these perceptions (i.e. alignment to the sense

of place and transparency of benefits distribution), considering contextual circumstances and unique attributes of each place and its people.

Practical contribution

The full evaluation of the Orkney Tourism Strategy 2020–2030 is not in the scope of this paper (it can be found in Roitershtein, 2024); however, it is important to note here that upon its review several improvements could be recommended. While the Strategy emphasises the need for sustainable tourism development, it currently misses an opportunity to demonstrate alignment with the attributes of the sense of place of many members of Orkney communities, predominantly rooted in physical and special attributes of the place, as well as appreciation and deeper engagement with Orkney heritage and community attributes. The Strategy also misses an opportunity to demonstrate its benefits to the wider Orkney community across the islands, placing stronger emphasis on economic benefit for tourism businesses and satisfying the needs of the visitors. This, as was evident from the wider study and touched on in this paper, causes some negative perceptions of the Strategy and scepticism of its sustainability objectives and the success of its implementation. The evaluation demonstrated misalignment of the strategy narrative with the sense of place of many members of Orkney communities, and it did not provide clear evidence that it is aimed to increase value of tourism for the wider Orkney community.

Therefore, by identifying the importance of sense of place in determining the sustainability needs of communities, as a foundation of the unique "Orkney" layer of context in this case study, underpinned by the preceding layers, provides significant practical contribution. It demonstrates that tourism development initiatives, especially in small coastal communities, can benefit from an analysis of these layers in shaping meaningful tourism strategies. This is particularly relevant for cold-water archipelagos where the distribution of power and resources can be unbalanced (Baldacchino, 2015a; Renfors, 2021). Furthermore, a strategy, underpinned by the understanding of the layers of context, including the "unique" layer, has the potential to develop an action plan with realistic, place-based and community-informed objectives. The practical contribution of this paper extends to the main doctoral study (Roitershtein, 2024), which provides a Place-based Strategy Evaluation Framework (PSEF), based on the need to increase the perceived benefits and reduce the perceived impacts, as advocated here.

Limitations

This research is limited by its application to the Orkney case study and its qualitative, multi-method approach. Furthermore, at the time of research, elements of the Orkney Tourism Strategy 2020–2030 (including the action plan) were still in progress due to delays caused by the COVID-19 pandemic. Nonetheless, the contributions of this research towards sustainability needs and tourism strategy present opportunities for further research. In particular, the application of the layers of context perspective to sustainable tourism development in other small coastal communities would present an opportunity to evaluate its effectiveness. Additionally, comparative studies into how sense of place

impacts upon sustainability needs in, and between other cold-water archipelagos and their coastal communities would be insightful.

Notes

1. Hereafter "the Strategy".
2. The term "needs" here applies to what the members of Orkney communities see as a required solution to the sustainability "challenges" of tourism development.
3. Participants MI-07 and MI-31 were excluded from data analysis following the decision to concentrate solely on the data obtained from the Orkney residents.
4. Orkney County Council Act 1974 states that 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).

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Disclosure statement

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