

The Tourism Strategy for the Outer Hebrides

Creating a leading 21st century tourism destination





Welcoming travellers from around the globe to our chain of wild Atlantic islands and inspiring them to: expand their mind and feed their soul through the experience of our landscape and exploration of our culture.



TOURISM toSUSTAIN OUR ISLAND COMMUNITIES and enable them to PROSPER.

By sharing our unique natural and cultural assets with visitors in a sustainable manner we can enable repopulation, enhance economic performance and create new opportunities.

CONTEXT



"...it felt appropriate to now review and update this Strategy to reflect current and arising industry priorities"

The Sealladh strategy was published in 2020. Visit Outer Hebrides (Outer Hebrides Tourism) oversaw its creation with support from Outer Hebrides Tourism Leadership Group partners (VisitScotland, Highlands & Islands Enterprise and Comhairle nan Eilean Siar).

The 2020 Strategy highlighted the vision, mission and aims for the Outer Hebrides as a destination over the coming decade, it set out target areas for cultivation and key opportunities for the island's visitor industry. Considerable progress has been made in achievement of Sealladh's aims in the first half of the strategy period, with the islands receiving the internationally recognised 'Best of the World' status for 2025 from National Geographic.

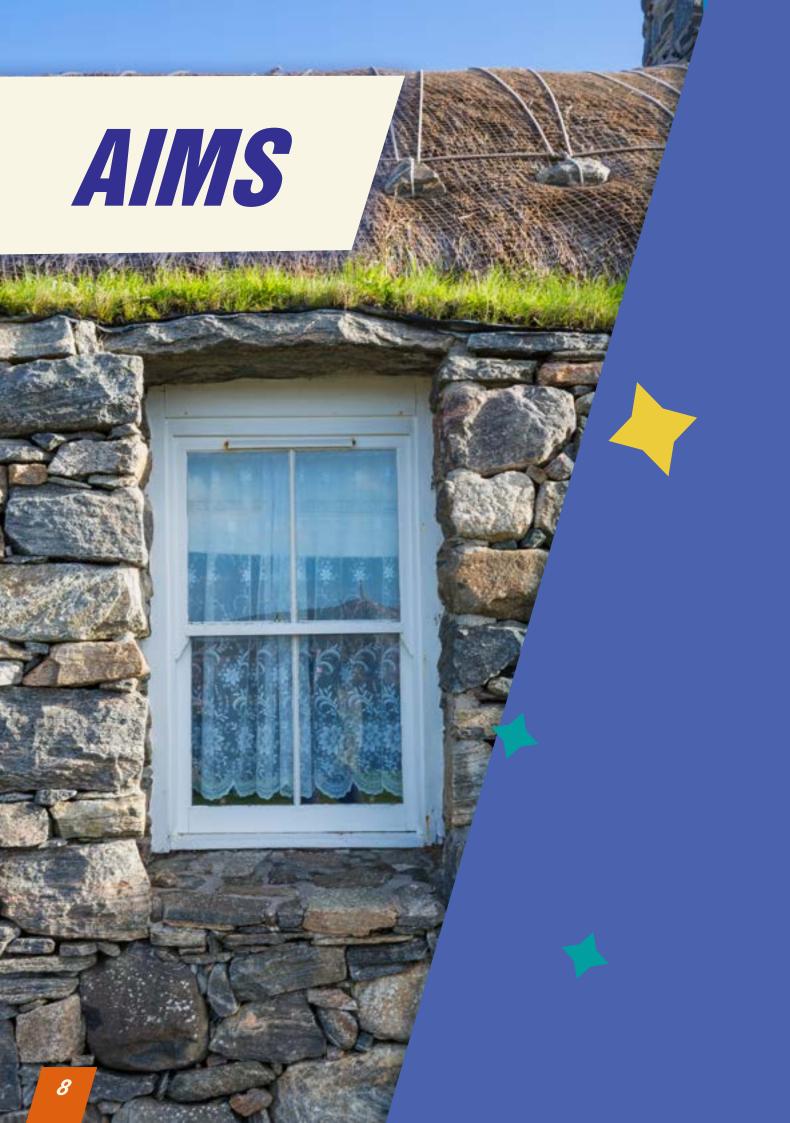
Given the significant changes in the local, national and international socio-political landscape since 2020 it felt appropriate to now review and update this Strategy to reflect current and arising industry priorities, within the context of the original document.

The Aims, Assets and Delivery routes outlined here relate to key areas highlighted in the original document, including:

- * The Destination Development strand of the Islands Growth Deal
- Continued support to annual and stand-alone events which act as economic catalysts and local cultural showcases - such as HebCelt, Ceòlas, Eilean Dorcha Festival, the 2027 Royal National Mòd and 2030 centenary of the St Kilda evacuation
- ★ Development and promotion of critical components of the islands industry such as the Hebridean Way long-distance walking and cycling routes, Cruise, Food & Drink and travel trade packages

...and also to arising opportunities and challenges, including:

- Consideration and development of an island-appropriate Visitor Levy to potentially generate investment for both the visitor management and community infrastructure needed to enable tourism
- * Adopting island / area specific approaches across the Outer Hebrides to reflect the diversity of tourism activity in the islands, acknowledging the differing levels of sectoral growth, investment and visitor offer within our destination
- Sustainably growing and developing the sector in the context of wider regional activity such as the introduction of new ferry vessels and timetables and the impact of major local renewable energy projects



To MAXIMISE VISITOR EXPERIENCE & LEGACY we will:

- Create memorable and accessible experiences which will attract visitors all year round
- Maintain high levels of returning & satisfied visitors
- Increase visitor spend
- Provide evolving, informative, accurate & engaging visitor information delivered via a range of formats and platforms

To SUPPORT VIBRANT & VIABLE COMMUNITIES we will:

- Develop a tourism sector which creates employment opportunities, fosters talent & attracts people to live in the islands
- * Advocate for reliable, efficient & affordable transport connectivity
- Assist the identification & delivery of infrastructure improvements to enhance our communities & accommodate visitors
- Champion responsible, sustainable & green tourism approaches to reduce the environmental impact of our sector

To DEVELOP OUR BUSINESSES & SECTORAL CONTRIBUTION we will:

- Facilitate a connected & collaborative visitor industry across the islands
- Strive to attract investment to our industry
- Support businesses to develop & promote their unique offers & harness digital innovations, including use of AI, to maximise their potential
- Preserve & showcase our world-class heritage & culture including Gaelic, music, archaeology, astrotourism, genealogy and Harris Tweed
- Promote our Food & Drink, Arts & Crafts and Experience sectors, developing opportunities around agritourism, hospitality, retail, manufacturing & supply chains

ASSETS

Whilst our landscape and culture are at the heart of our destination appeal, our key assets are our people:

OUR COMMUNITIES & ISLANDERS

Ensuring tourism activity builds community wealth, capacity and confidence across the islands by stimulating the economy, addressing population challenges and creating a positive destination 'halo' effect.

Not only does tourism create job opportunities, especially in rural areas where employment options are limited, but it is also proven to foster local pride and engagement in areas recognised as positive and attractive destinations.

Successful destinations provide visitor satisfaction, encouraging longer stays, repeat visits and higher spend - which then perpetuates the benefits of tourism to the local area and enables the sector to become more resilient and sustainable.



DEFINING PROGRESS:

- Job creation and retention
- Infrastructure that supports visitor activity
- Sustainable tourism approaches embedded
- Transport connectivity

OUR VISITORS

Independent, seasoned explorers from across Scotland are traditionally our core market and will likely remain so, however we are experiencing a general evolution of visitor profile and our sector is becoming more diverse:

- Younger visitors (esp. domestic travellers) looking for authentic culture and environmental experiences
- Overseas visitors in search of the ultimate Scottish experience
- Cruise passengers and crew seeking out the unique Hebridean experience amongst a wider schedule and with limited visit time
- Expansion of the day visitor
 market with the introduction of
 new ferry timetables
- Activity based holidays
 centred around the outdoors,
 particularly those cycling and
 walking the Hebridean Way
 long-distance route
- Visitors with specific accessibility needs

- those travelling as part of a theme specific tour (wildlife appreciation, arts and culture experiences, outdoor exploration etc...) and those travelling as part of a small private party, often friends or multi-generational family group
- Those visiting for work or family purposes who wish to engage with island experiences during their stay



DEFINING PROGRESS:

- Provision of memorable experiences
- Availability of relevant visitor information
- Reported visitor satisfaction
- Increased visitor spend



OUR VISITORS



Common to all our visitors is the desire for authentic experiences they can connect with physically and emotionally through the environment and culture.

Building on past strategic development of the local visitor sector our authentic experiences can be categorised as:

FOOD & DRINKAtlantic Larder

HERITAGEHistory & Stories

NATURE Closer to Wildlife

ENVIRONMENTEpic Landscapes

CULTURE Living Gaelic

WELLBEINGMind, Body & Spirit

"Our individual businesses are the heart of our visitor industry."

Our individual businesses - from small scale seasonal activity to community enterprises, year-round operations to companies of scale - are testament to a local spirit of ambition, creativity and innovation, they are the heart of our visitor industry.

However, in order to maximise their collective potential as a cohesive sector, a strategic and co-ordinated approach is required.

Attractive, sustainable and successful destinations all have collaboration and an economically supportive agenda in common.



DEFINING PROGRESS:

- Building industry connections
- Developing sustainable investment to support the sector
- Developing the potential of our businesses to emerge, grow and diversify
- Maximising the assets we have natural, built, human and cultural – to provide visitor experience and local benefit

DELIVERY





The local tourism sector in the Outer Hebrides is strategically directed by the local Tourism Leadership Group comprising key partners, this Group is chaired by Visit Outer Hebrides (Outer Hebrides Tourism) who in turn liaise with a membership base of over 600 local tourism enterprises.

At this time there are recognised fiscal challenges across the economy, especially for public and third-sector organisations such as those comprising the Outer Hebrides Tourism Leadership Group. As these partners are responsible for delivery of this Strategy the reduction in their resources poses a real threat to the ongoing success and viability of the island's visitor industry.

Currently around 40% of island businesses re-invest in the local sector through membership of Visit Outer Hebrides, covering approximately 50% of the annual costs of current local industry management*.

*In the past public sector grants were available to subsidise the additional destination management costs and more recently VOH reserves have enabled continuation of services, but this is no longer sustainable.



OUTER HEBRIDES TOURISM LEADERSHIP GROUP

Visit Outer Hebrides / CnES HIE & VisitScotland

LOCAL BUSINESSES & COMMUNITY ORGANISATIONS

Deliverying Services & Experiences

VISIT OUTER HEBRIDES

Local Industry co-ordination & Visitor Engagement

DELIVERY

The vast majority of VOH members are long-standing contributors, indicating that whilst all local tourism related businesses benefit from a well-managed and promoted destination, attracting reinvestment into the sector from the wider visitor business community is challenging. This is part in due to the misperception that local/national government support destination management directly.

Whilst there is ongoing significant investment in visitor related infrastructure from capital sources, including Islands Growth Deal, UK and Scottish Government (Deep Water Terminal, Stornoway and the forthcoming Community Regeneration Partnership allocation) – there are diminishing resources to support and manage the increasing volume of visitors attracted by these developed assets.

"The vast majority of VOH members are long-standing contributors"

The lack of a sustainable framework for destination management makes delivery of this Strategy extremely challenging with the likely imminent reduction / withdrawal of the following services provided by Visit Outer Hebrides:

- * Promotion of the islands as a visitor destination via:
 - The VisitOuterHebrides website which is the primary source of information on the Outer Hebrides with over 2million hits per year
 - Our destination Social Media channels which promote the islands to almost 150,000 followers
 - Collaborations with wider press, media and online content creators
- Promotion of responsible tourism messaging to visitors
- Provision of visitor information including in-person, print and digital promotion of individual businesses, attractions and services
- ★ Lobbying for the interests of the islands visitor industry and making the voice of local businesses heard locally and nationally – affecting the local sectors of accommodation, service providers, creative industries and food & drink

Collection of industry data and insights to monitor the socio-economic impact of the sector and inform strategic planning.







