Outer Hebrides – Visitor Data Report 2025

Edinburgh Napier UNIVERSITY
The Business School
The School of Computing, Engineering & the Built Environment

Visit Outer Hebrides

OUTER HEBRIDES COMMUNITY LED LOCAL DEVELOPMENT
LEASACHADH FO STIÙIR NA COIMHEARSNACHD INNSE GALL

Supplier Response

This report has been compiled by Dr Ross Tinsley, Dr Pete Barclay and Peter Stefán with additional guidance by Prof. Jane Ali-Knight.

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Report objectives

The following objectives are addressed in this report:

1) Gather, align, compare and analyse existing data sets relevant to the islands' visitor industry therefore adopting a new approach which makes best use of already available data.

2) Identify gaps in visitor data not currently captured and aim to fill these with original survey recommendations.

3) Create models for this analysis and survey work which can be more easily replicated going forward, allowing OHT and partners to regularly update visitor insights without having to commission new projects every time

4) Return both an up-to-date, accurate information report about current visitor volume, value and activity and projected information that estimates what direction the local sector is headed in, therefore enabling more accurate policy and project planning.

Note on the survey sample

The report relies upon data collected annually by Visit Outer Hebrides to assess the volume, type and occupancy of visitor accommodation across the islands. Therefore, the figures presented and conclusions drawn, particularly when comparing year-to-year activity should be taken within the context of the available sample set. Unless otherwise stated the annual results reflect the mix of respondents that responded that year; and where increases, decreases or other changes are observed it may, in part, just be a reflection of each year's particular sample make-up, this is especially relevant in areas where there is a smaller market e.g. Barra & Harris.

Report Summary 2024

Tourism is an essential part of life, community and the economy of the Outer Hebrides.

The islands are home to apx. 26,000 residents and the findings of this report indicate that in 2024 they shared these beautiful islands with approximately **333,500+** visitors.

These visitors, including around **57,000** day visitors (mainly cruise passengers entering via Stornoway), generate over **£81.5million** (excluding transport costs and indirect spend) for the local economy.

This accounts for **16% of the total economy** of the Outer Hebrides, an increase of 25.4% since 2017.

Adding in average transport costs, the economic value of visitor activity rises to **£136million** and it is worth noting that this figure still excludes the recognised 'multiplier effect' that tourism brings to other sectors such as financial services, food retail and construction.

The report finds:

- 66% were domestic UK visitors (26% from Scotland) / 34% were international visitors.

- 43% stayed in serviced accommodation and 69% stayed in non-serviced accommodation.*

  (*This adds up to more than 100% due to some visitors staying in more than one accommodation type.)

- Visitors who have the Outer Hebrides on their itinerary stayed on average of 12.6 nights in Scotland, of which 6 nights were in the Outer Hebrides.

- Total Capacity across the islands in 2024 was 7,890 bed spaces per night available, with an average year round occupancy at 57%.

- This calculates to 1,641,514 overall bed nights per annum (a decrease of 8% on 2023).

- 1,641,514 bed nights per annum occupied by visitors staying an average of 6 nights indicates 273,586 individual visitors staying overnight per annum.

2024 Outer Hebrides accommodation provider numbers

	No:	Capacity (beds)
Hotel	28	898
B&B / GH	111	612
Sporting Estate	8	111
Self-Catering Houses	947	4847
Camping Parks	29	726
Hostel	15	247
Pods, Caravans etc	107	449
Total	**1246**	**7890**

Average occupancy rates 2024

Overall: **57%** April – Oct 2024 68% Nov – March 2024 32%

Island spread %

Based on analysis of travel data, bed stock availability, occupancy rates per annum and local intelligence on the tourism market in the Outer Hebrides, we can analysis the worth of the tourism economy per island:

	% of total visitor worth	**£ worth to local economy**	**Population Split:**	**Total economic output per island (all industry)**	**% of tourism spend on total economic output per island**
Lewis	46.6%	39,232,407 (inc. day visitors)	18,335	360,329,000	10.9%
Harris	18.4%	14,551,172	1831	35,951,100	40.5%
Uist	25.7%	20,313,151	4666	91,616,000	22.2%
Barra	9.3%	7,350,673	1300	25,521,600	28.7%

Whole of Scotland sectoral overview

In 2024, there was a total of 92 million tourism visits to Scotland, including domestic and international overnight trips and day visits.

Outer Hebrides share of the total tourism visits for Scotland is **0.4%**, in line with the island's population share of Scotland.

Over the same period the sector was worth a total of £11.4 billion in total visitor spend in Scotland. Domestic overnight tourism accounts for 46% of total tourism spend, international tourism accounts for 54%, with a total overnight tourism spend of £7.4 billion.

Outer Hebrides share of the total overnight tourism spend for Scotland is **1.07%**, indicating the economic impact of tourism in the Outer Hebrides is higher than the island's share of the national visitor market.

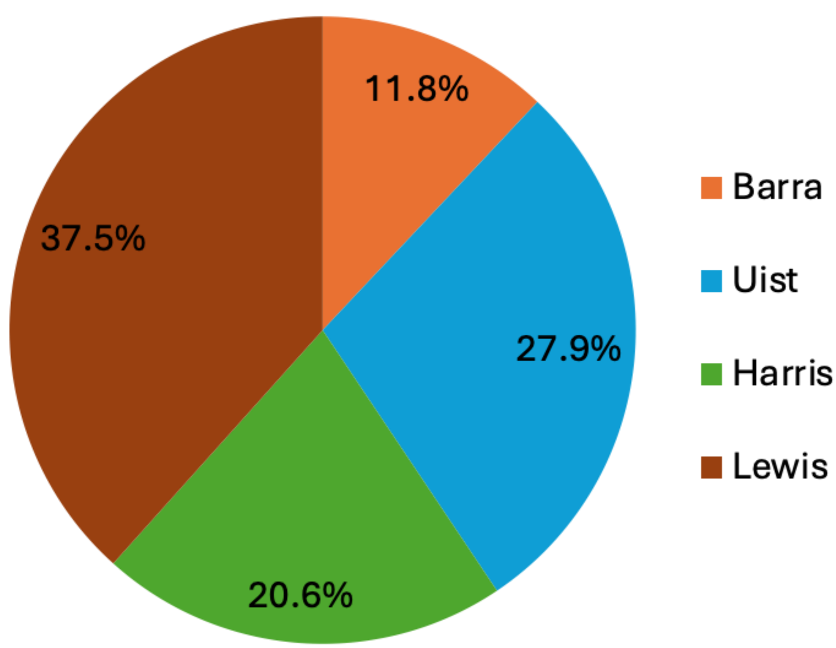
Tourism is a significant contributor to the Outer Hebrides' economy **(16%),** with visitor spend increasing over the last few years. In Harris for example it accounts for 40.5% of the total economy for Harris. The sector is highly seasonal, with most visits and accommodation occupancy concentrated between April and October, but with a burgeoning winter season in some areas. Accommodation is dominated by small-scale providers, with 1,246 businesses offering around 7,900 bedspaces. Key transport access is limited to several ferry and air routes, creating capacity constraints.

Business background information

Where is your business based?

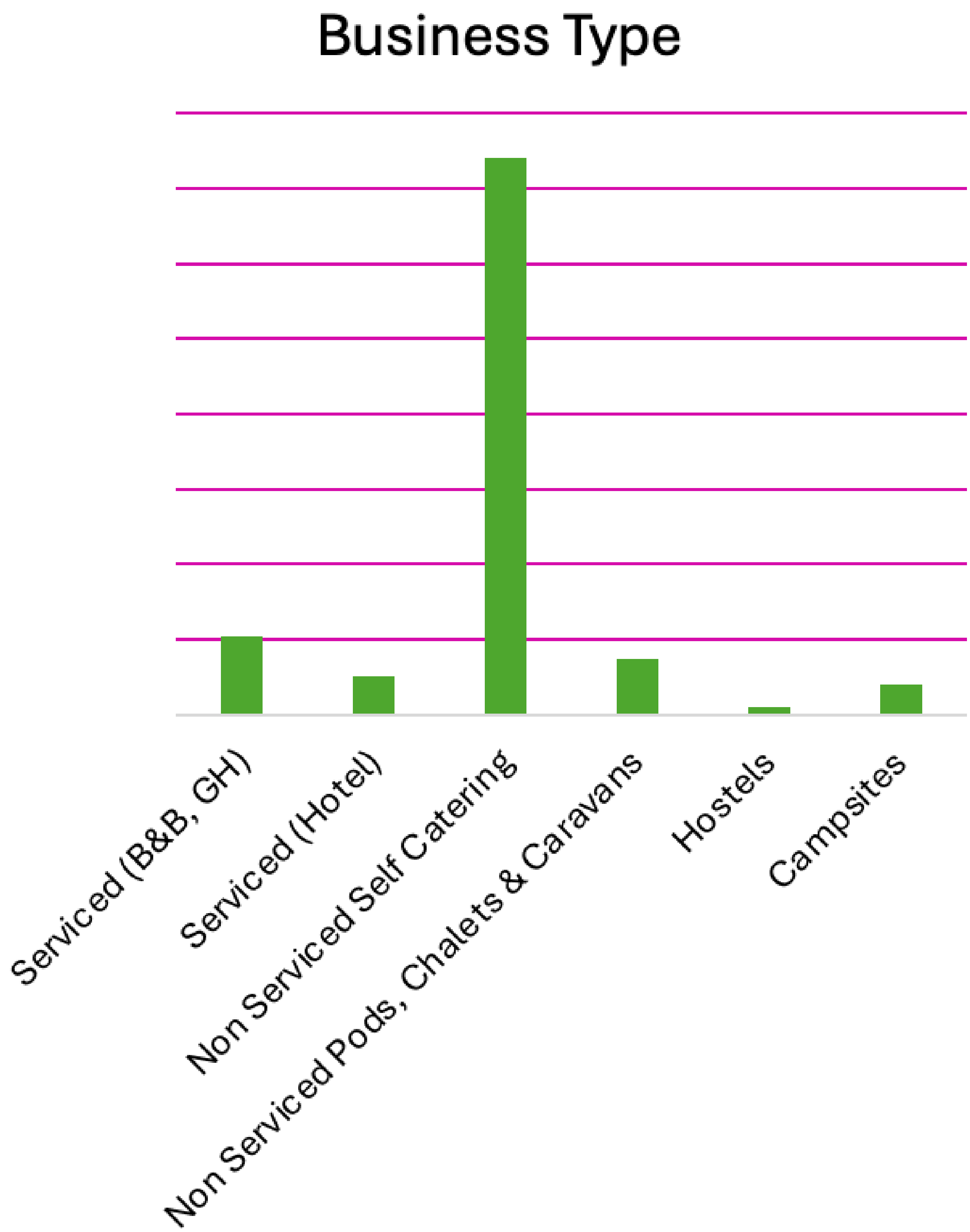
168 accommodation businesses responded to the 2024 Visit Outer Hebrides Occupancy Survey, representing 204 separate businesses. Respondents were both members of VOH and wider industry businesses registered to the VOH mailing list invited by email to complete the survey. Members with more than one tourism type were encouraged to complete a new questionnaire for each type of business that they owned.

The majority of businesses were based in Lewis (37.5%) followed by Uist (27.9%), Harris (20.6%) and then Barra (11.8%). The Lewis and Harris region is the largest (58.1%) in comparison to Uist and Barra (39.7%).



Business type

Non-serviced accommodation (self-catering houses, pods, chalets, hostels and campsites) is clearly the dominant type of business at 72%, with Serviced accommodation coming in at 21%.



In comparing year-to-year figures (removing campsites/hostels at 5% for a direct comparison) we can see that non-serviced accommodation has decreased by approx. 4% from 2023 to 2024, while serviced accommodation has decreased by 13%, with the decline coming wholly from B&B/Guesthouse sector.

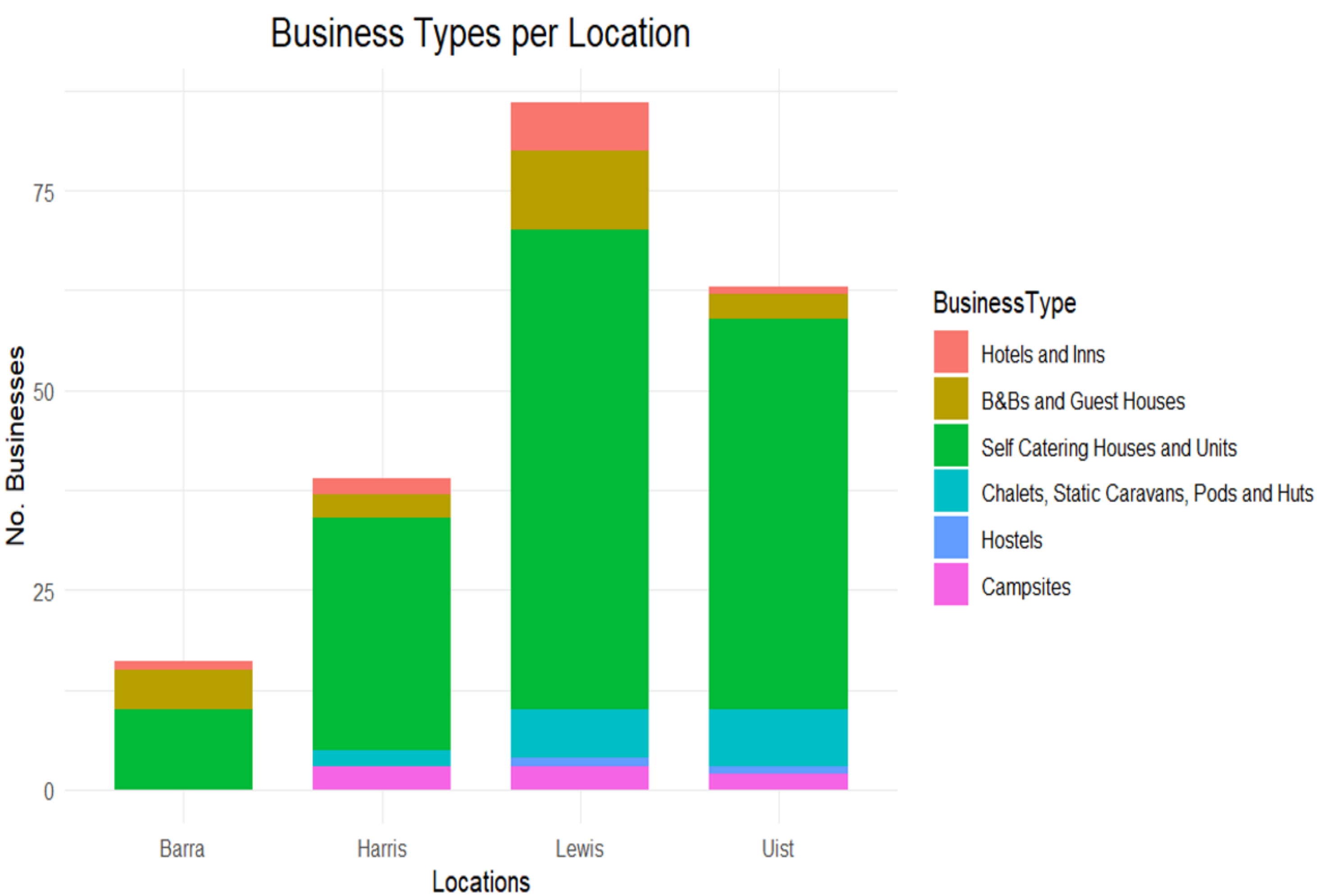
Type	**2023**		**2024**		**Variance**	
	No of Providers	Capacity	No of Providers	Capacity	No of Providers	Capacity
Hotel	28	844	29	898	1	54
B&B / GH	133	716	111	612	-22	-104
Sporting Estate	8	106	8	111	0	5
Self-Catering/Serviced Apartments	1064	5132	947	4847	-117	-285
Camping Parks/Overnight Parking spots	26	533	29	726	3	193
Hostel	15	247	15	247	0	0
Pods / Chalet / Static Caravans	43	247	107	449	64	202
Other	3	63	0		-3	-63
Total	**1320**	**7888**	**1246**	**7890**	**-74**	**2**

Source: VOH annual audit of all accommodation stock 2024

Business type by location

When business types are compared by location, we can see the above pattern of non-serviced accommodation dominance across all four island groups, but there is a notably larger proportion of serviced accommodation in Lewis, and to a lesser extent in Barra, than in Harris and Uist.

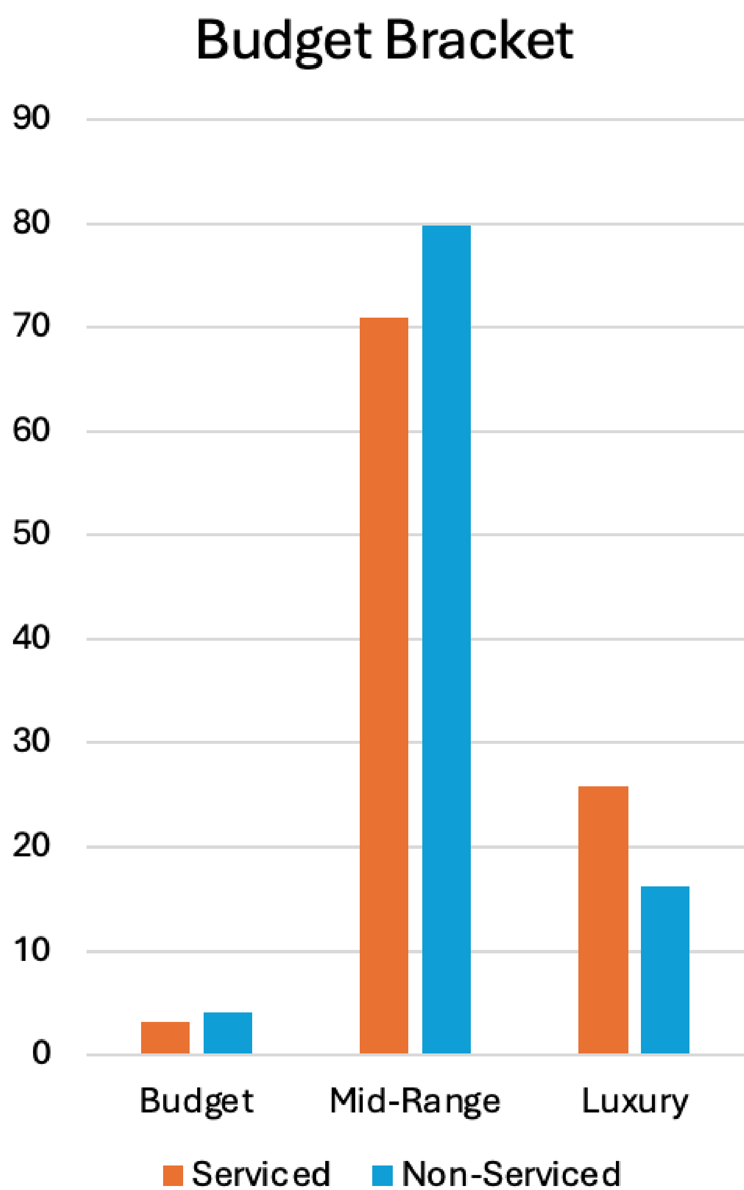
Uist skews more towards chalets, static caravans, pods and huts than do Barra and Harris, with service amount in Uist similar to that in Lewis. As previously illustrated in the above pie chart Lewis has the most amount overall followed by Uist, Harris and Barra, respectively.



Source: VOH annual audit of all accommodation stock 2024

Accommodation budget type perception

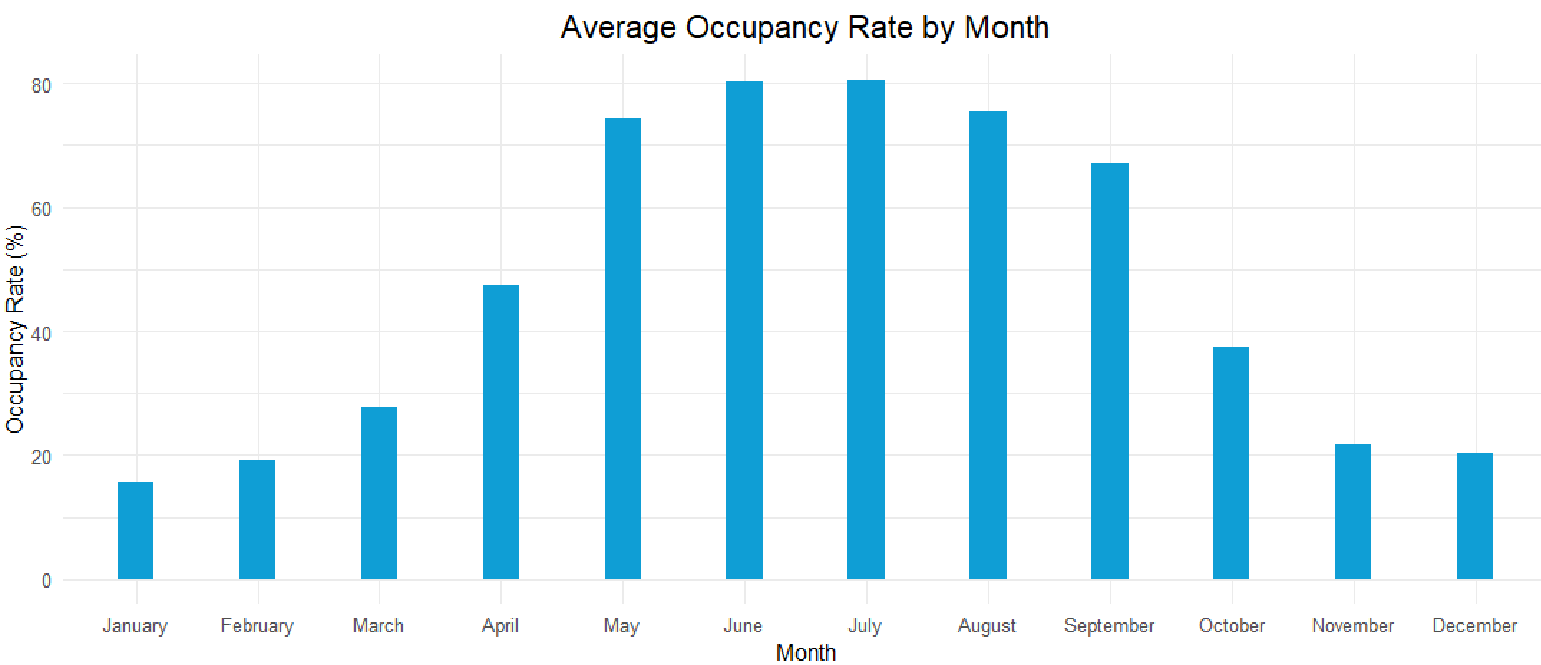
Most accommodation businesses (both serviced and non-serviced) consider themselves to be providing mid-range accommodation.
Of the two other categories – budget and luxury - Outer Hebrides provision goes significantly more towards the luxury end of the market than budget, with high-end stays offered by both non-serviced and serviced accommodation providers.
It is worth noting that from 2023 to 2024 there was a swap around in terms of the serviced/non-serviced make-up, with serviced luxury accommodation now accounting for a higher proportion of the market.
Overall, during the same period there was a decrease in both budget and luxury accommodation provision.



Occupancy rates

Average occupancy overall 2024	57%	-8% v 2023
Average occupancy Apr - Oct 2024	68%	-5.5% v 2023
Average occupancy Nov - Mar 2023	32%	+14.3 v 2023

Compared to the previous year overall occupancy trends are down, however occupancy over the winter months has increased by a notable margin.

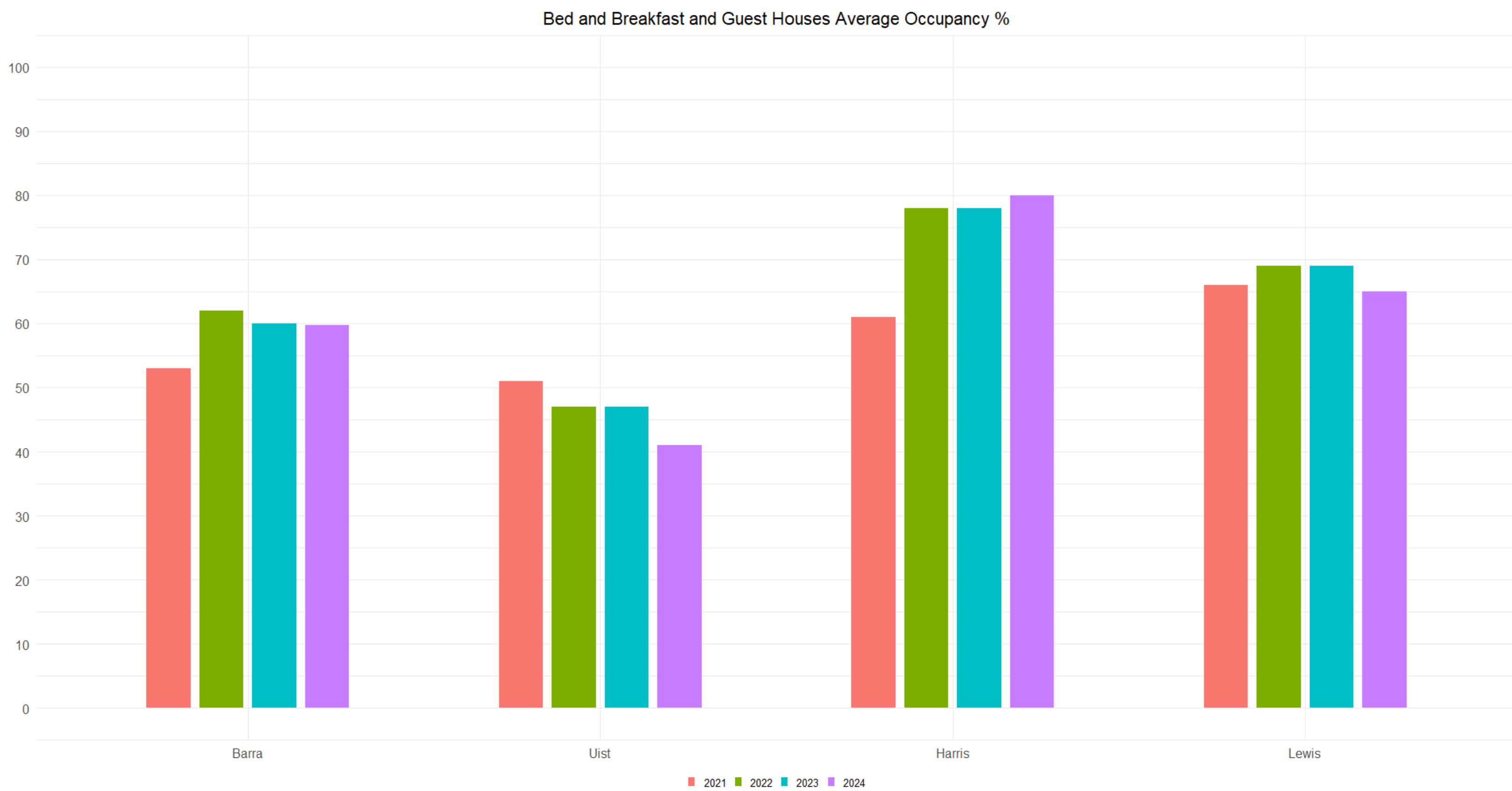


Occupancy rates - B&B and guest houses

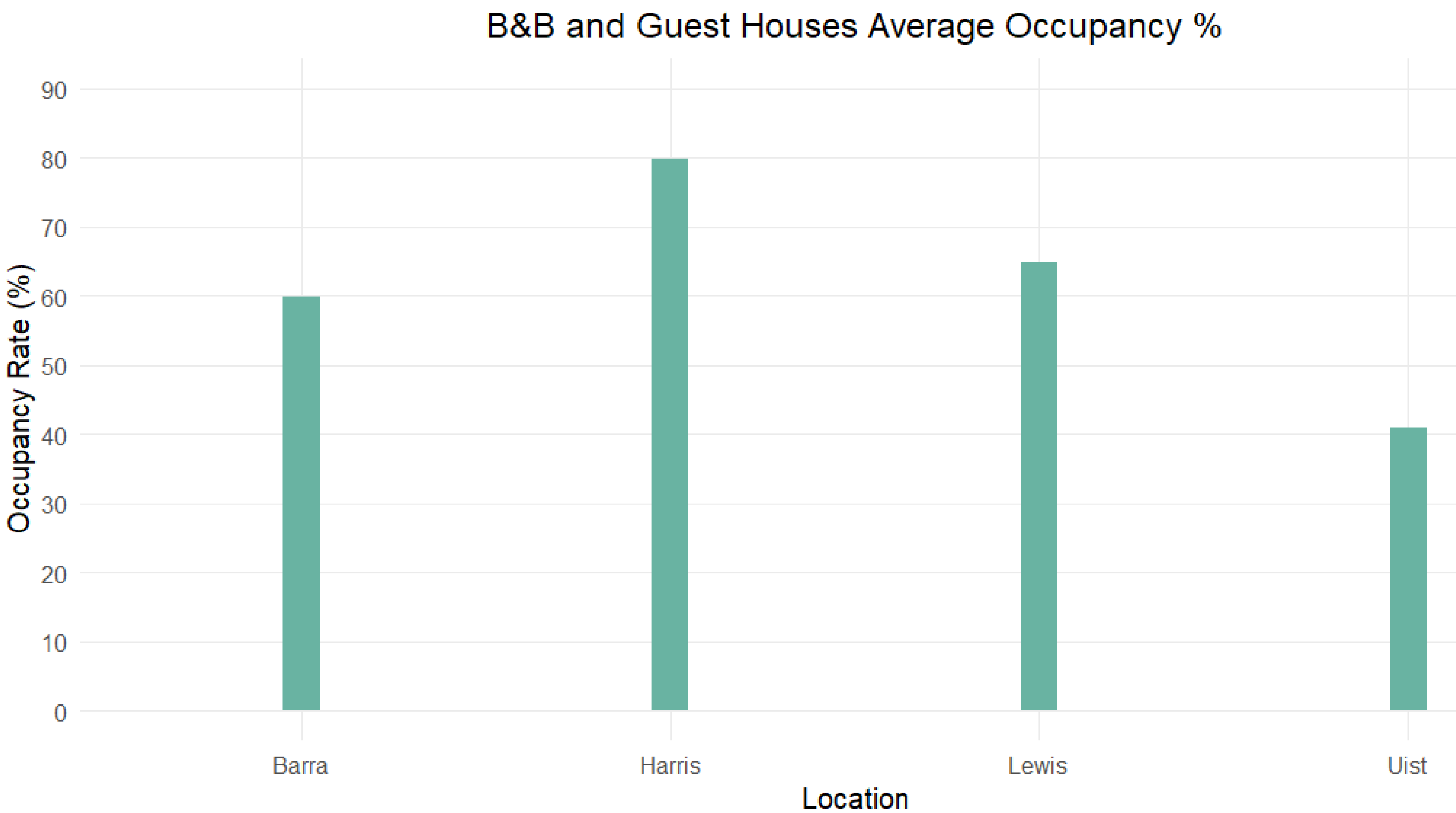
B&B accommodation occupancy increased slightly to an average of 61.4% in 2024 compared to 60% in 2023, an increase of 2.3%

Occupancy rates in Uist decreased by 13% over the same period, whilst Harris increased by 2.6%.

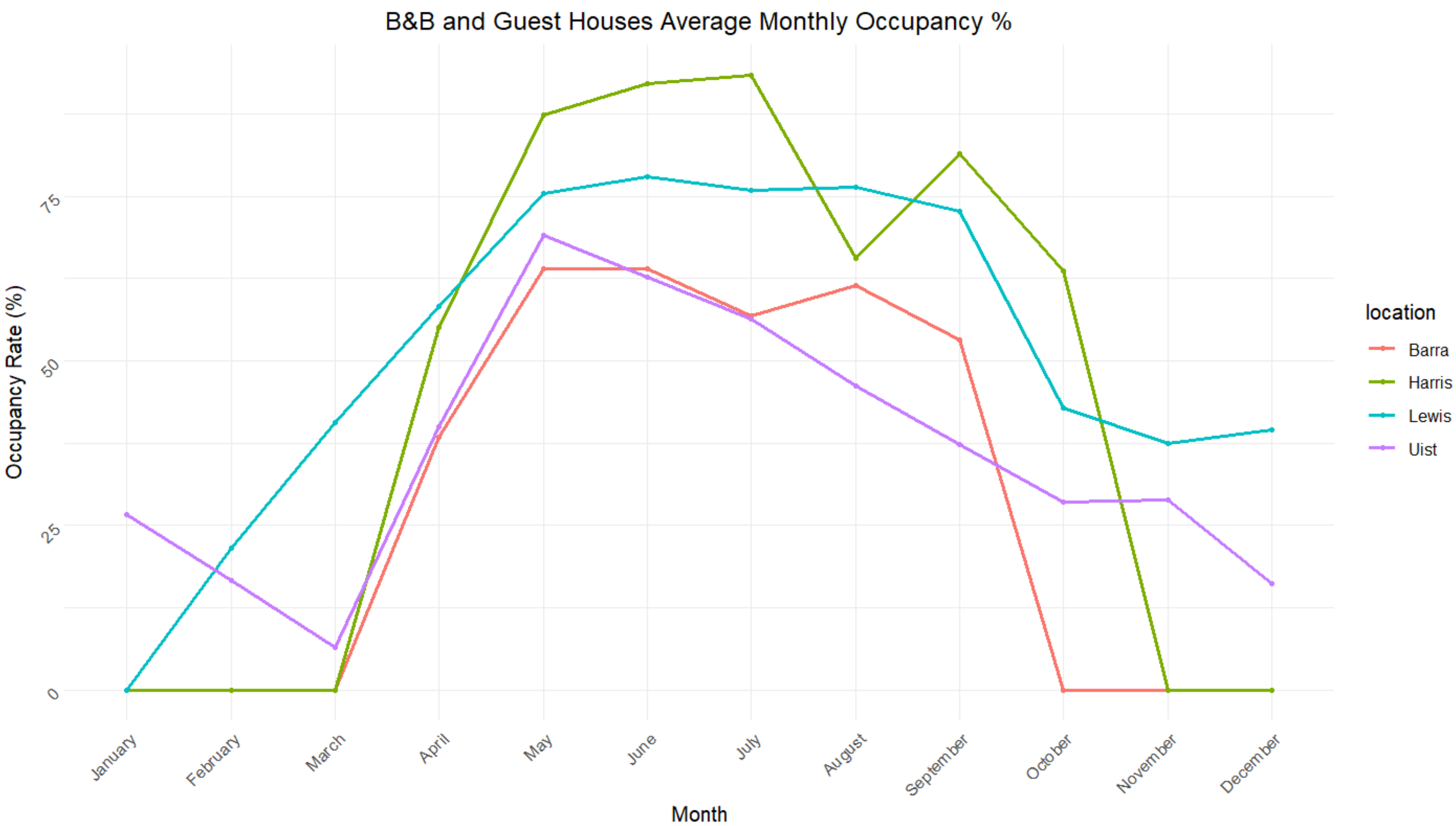
National average 2024 57.65%*
Source: Scottish Accommodation Occupancy Survey 2024



For 2024, average occupancy is highest in Harris at 80%, then Lewis is next at approximately 65%, while Barra is 60% and Uist just over 40% which is the same ranking pattern as in previous years.



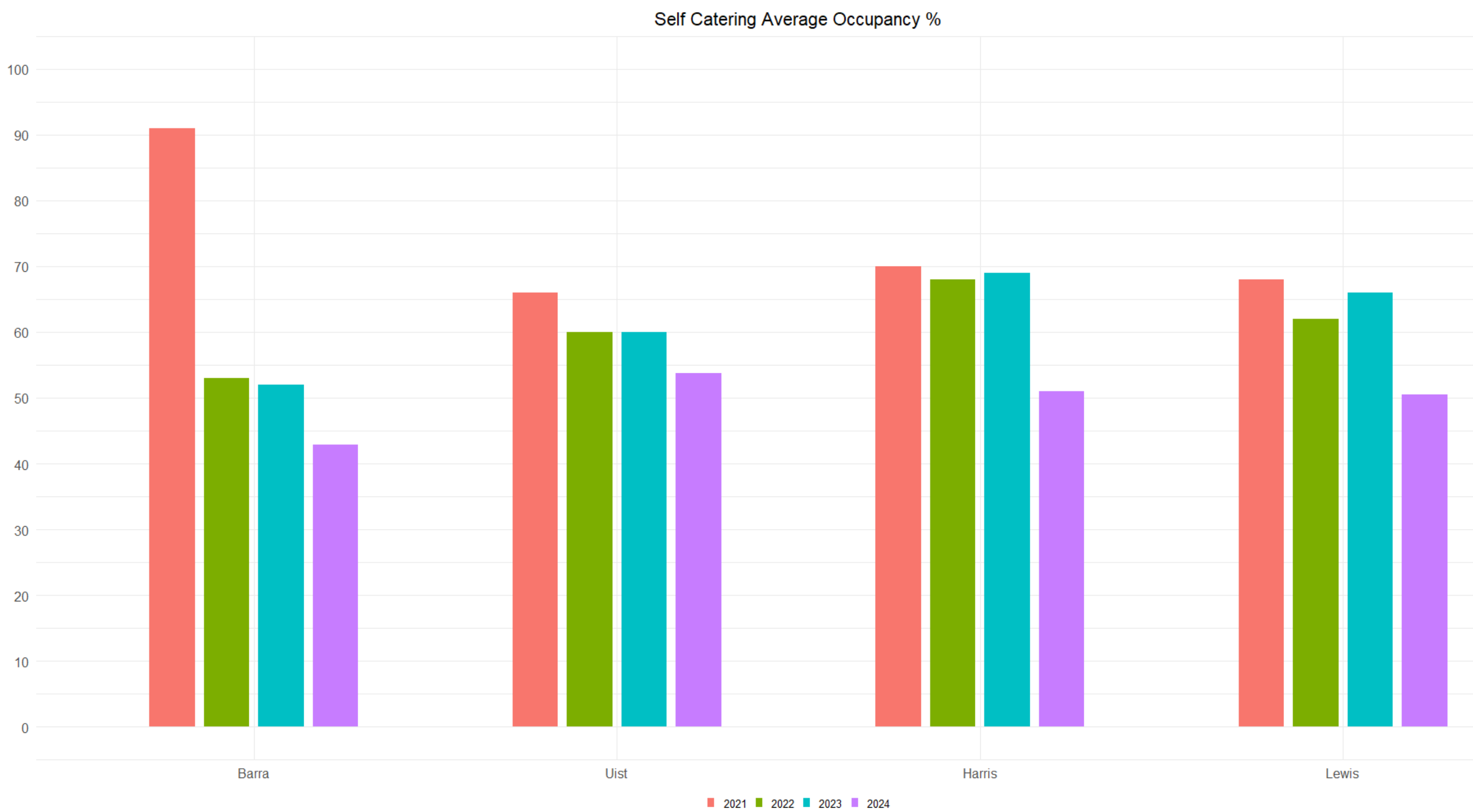
When looked at from an average monthly occupancy perspective we can see that Harris peaks highest while Lewis is next but with a longer season overall. Next are Uist and Barra which perform similarly although the former fares better in the low season.



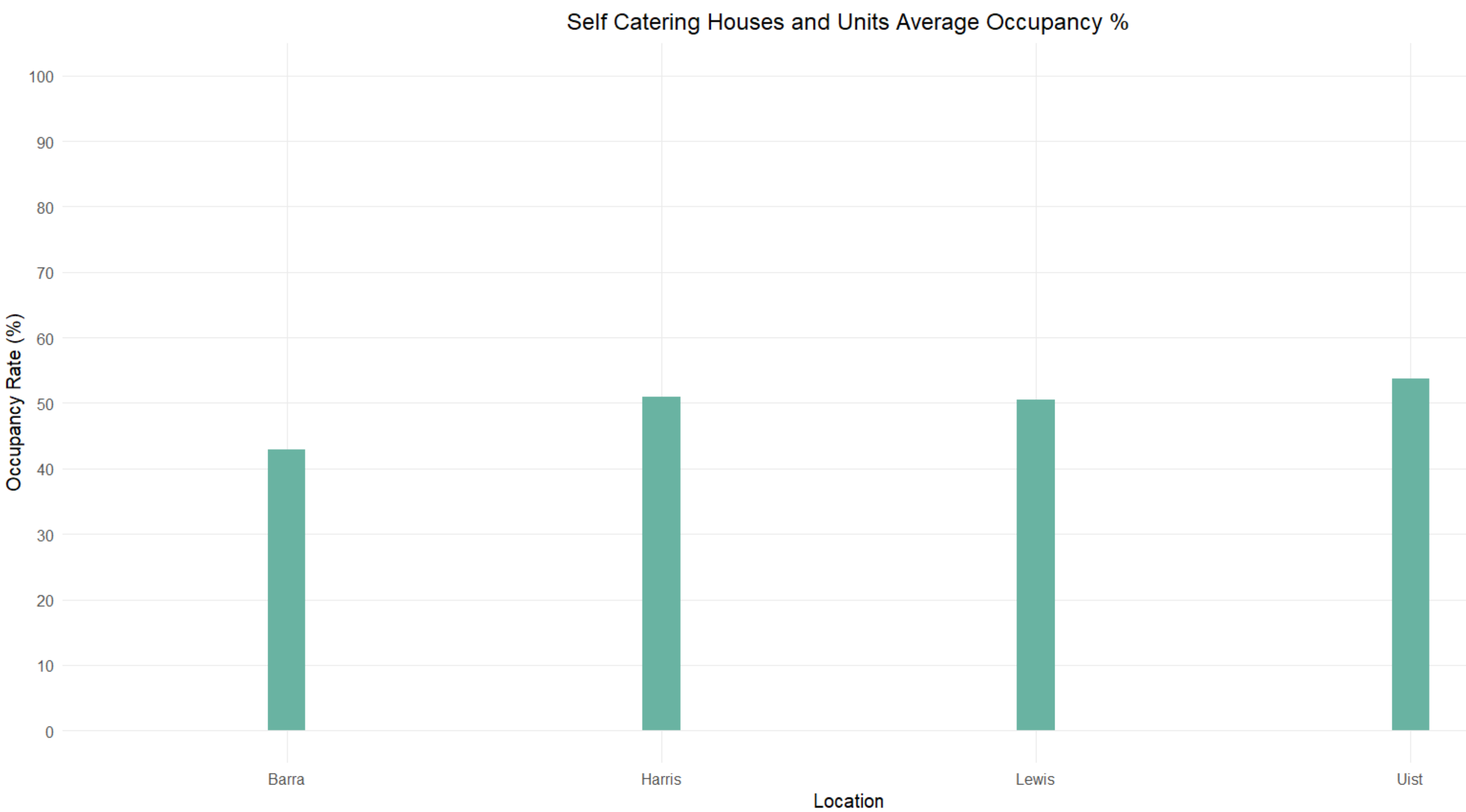
Occupancy rates – Self-catering

Self-Catering average occupancy rates are at 50% for 2024 compared to 60.5% in 2023, an overall decrease of 17%. Occupancy rates in Harris have seen the biggest decrease of -26% when compared to 2023, with the smallest decrease of -10% attributed to Uist.

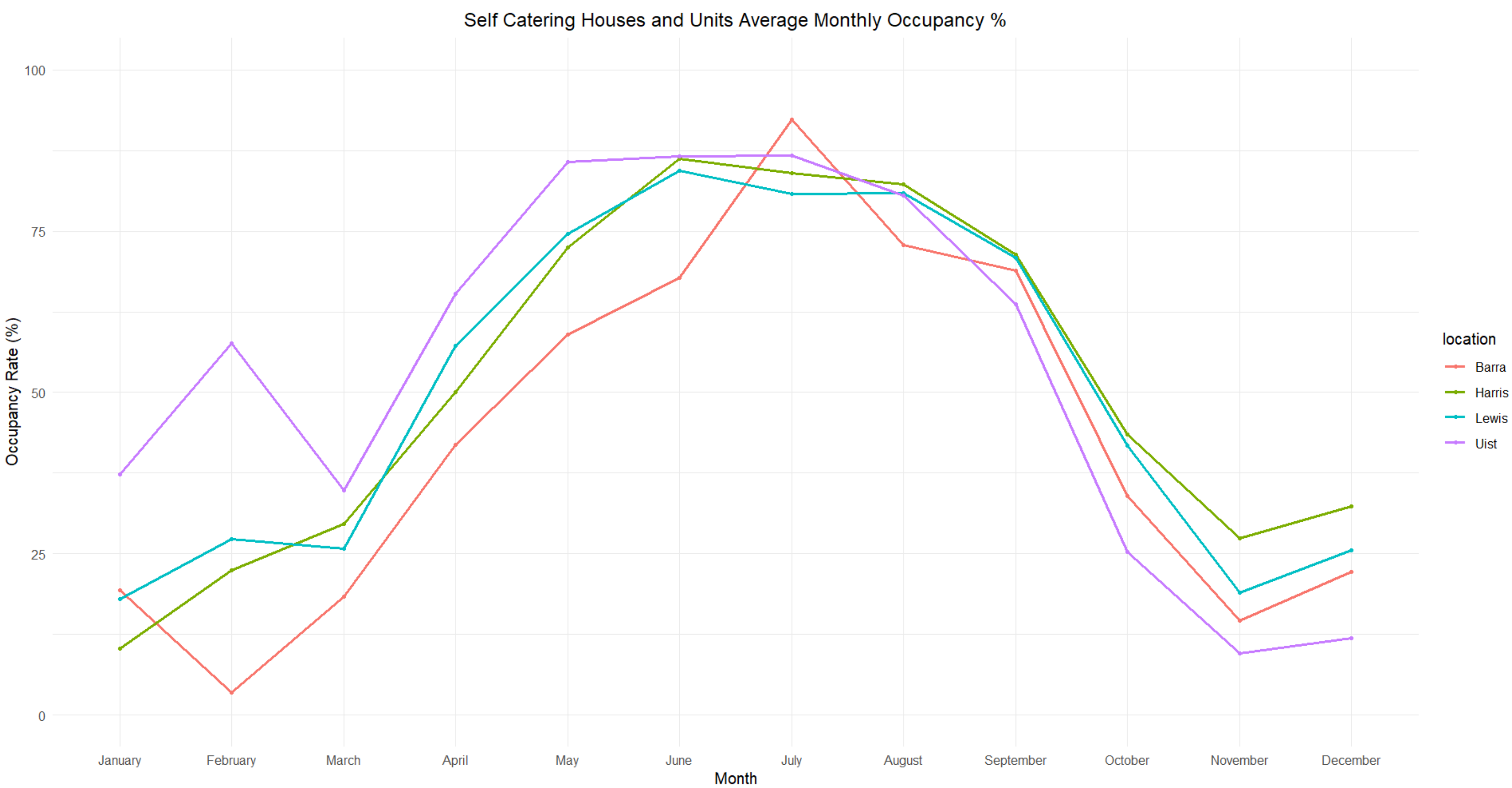
National average 2024 41.00%
(* source: Scottish Accommodation Occupancy Survey 2024)



Average self-catering occupancy is consistent for 2024 across all the island groups around the 50% mark with just Barra a little lower at approximately 42%. This trend is also reflected in the average monthly occupancy.



When looked at regards average monthly self-catering occupancy we can see Uist starting the season higher earlier before levelling-off with the other islands and then ending the season lower than the rest. At the other end, Barra peaks lowest for most of the season until the end period when Uist drops below. Lewis and Harris fall somewhere in-between and are largely similar throughout the season. (Again, it is worth remembering that trends indicated will reflect that year's particular survey sample.)

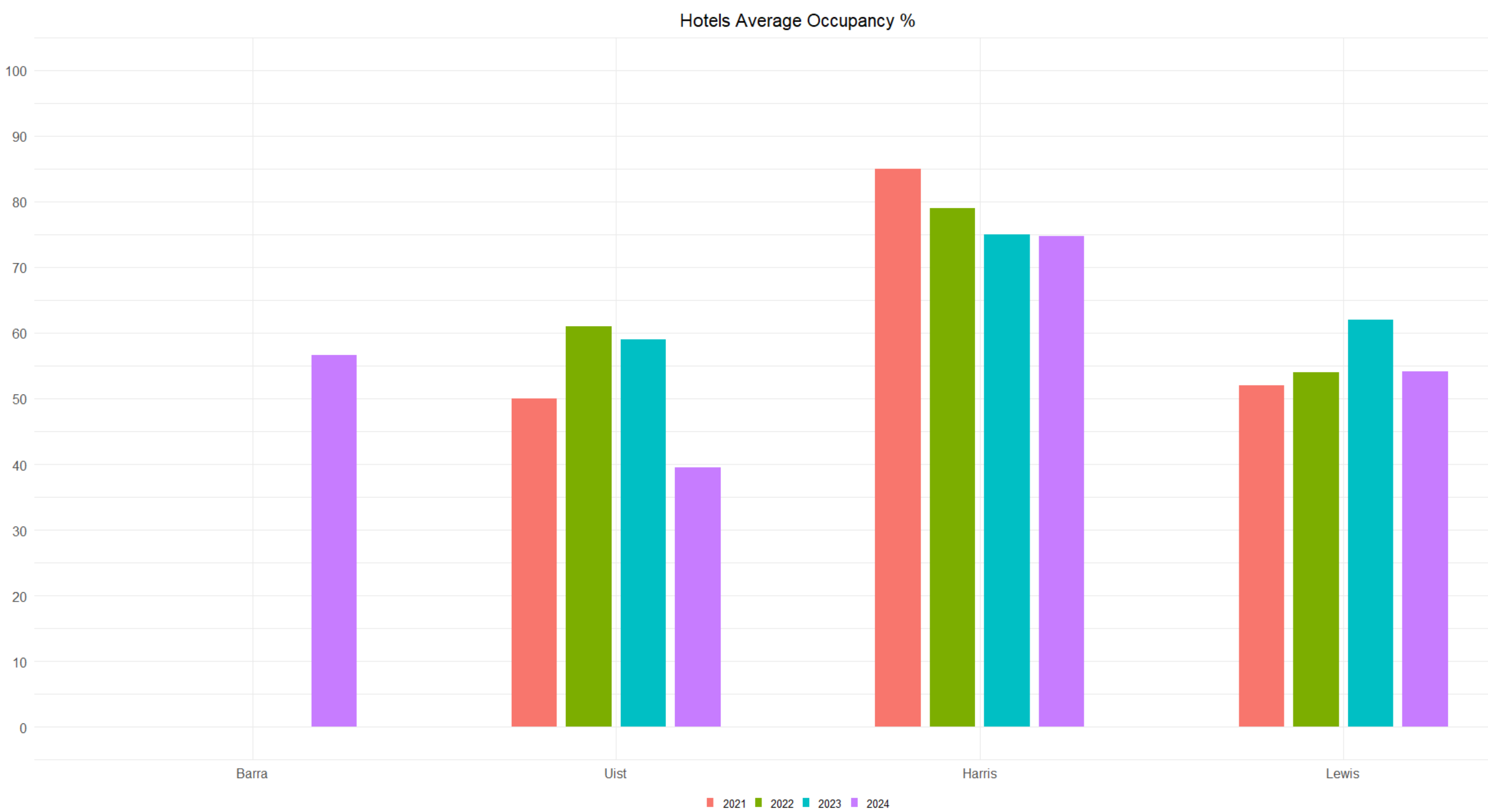


Occupancy rates - Hotels and Inns

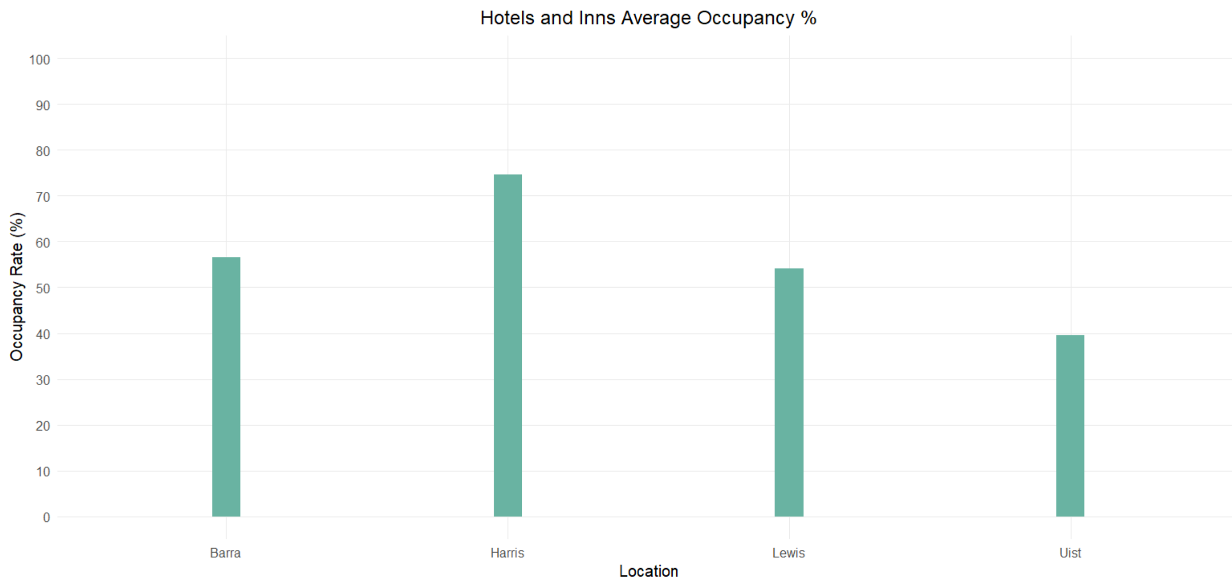
Occupancy rates for hotels have decreased to 56.3% in 2024 from 64% in 2023, a decrease of 13.8%. Uist hotels are -32.2% from 2023

Most of Lewis's hotels are open all year round, whereas many of the hotels elsewhere in the Outer Hebrides close for at least 1 month in the winter. This, therefore, has an impact on the occupancy percentage reported. It should be noted that there is a huge variety of capacity between the comparable hotel stock per island group. Finally, there is no direct comparison for Barra as this island group was not listed separately in the previous year's report.

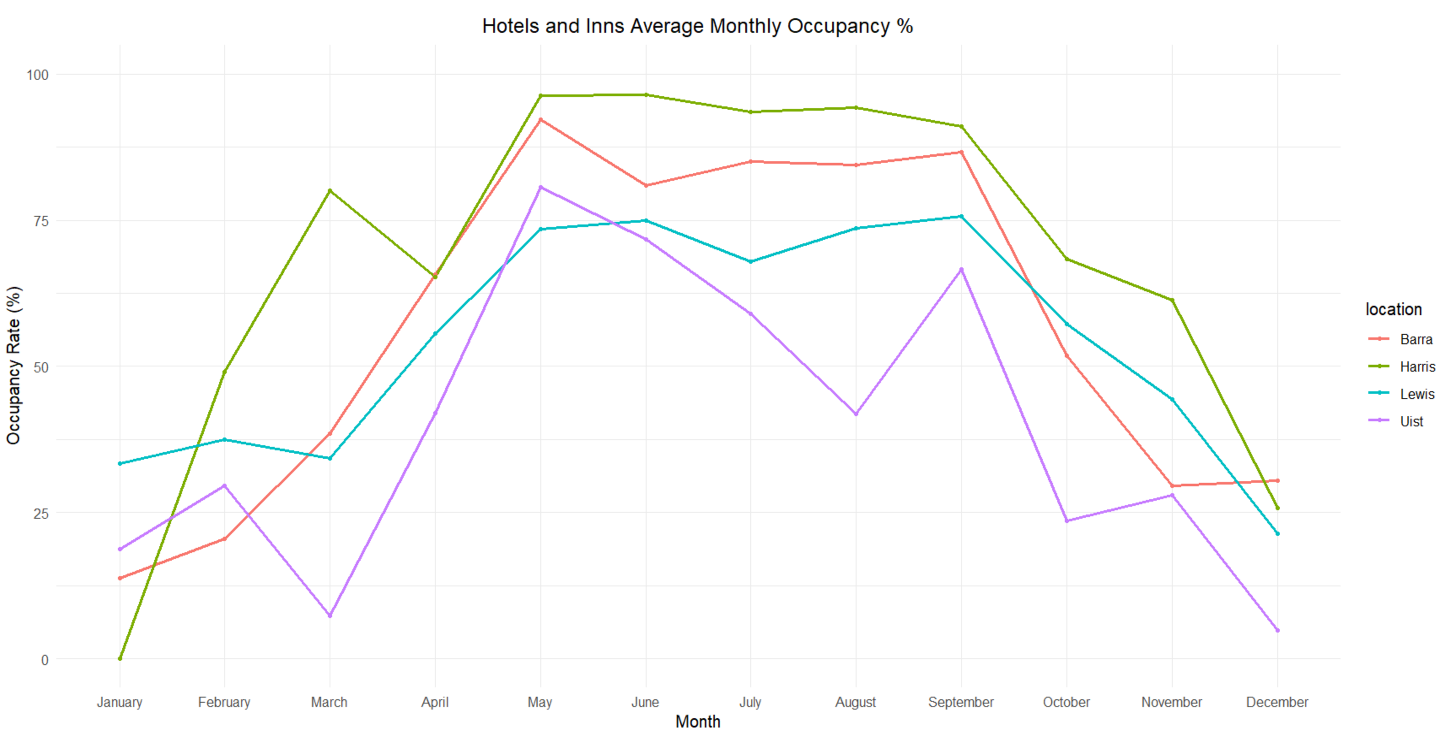
National average 2024 69.37%*
Source: Scottish Accommodation Occupancy Survey 2024



Average occupancy is highest for 2024 in Harris at approximately 75%, then Barra and Lewis in the mid-50s and Uist lower at just 50%. This trend is also reflected in the average monthly occupancy.



All four island groups broadly follow the same monthly average occupancy pattern with Harris being a little earlier in its rise at the start of the season and performing strongest overall. We can see a general trend of peaking earlier in the high season period with September being the key drop-off month for all four.



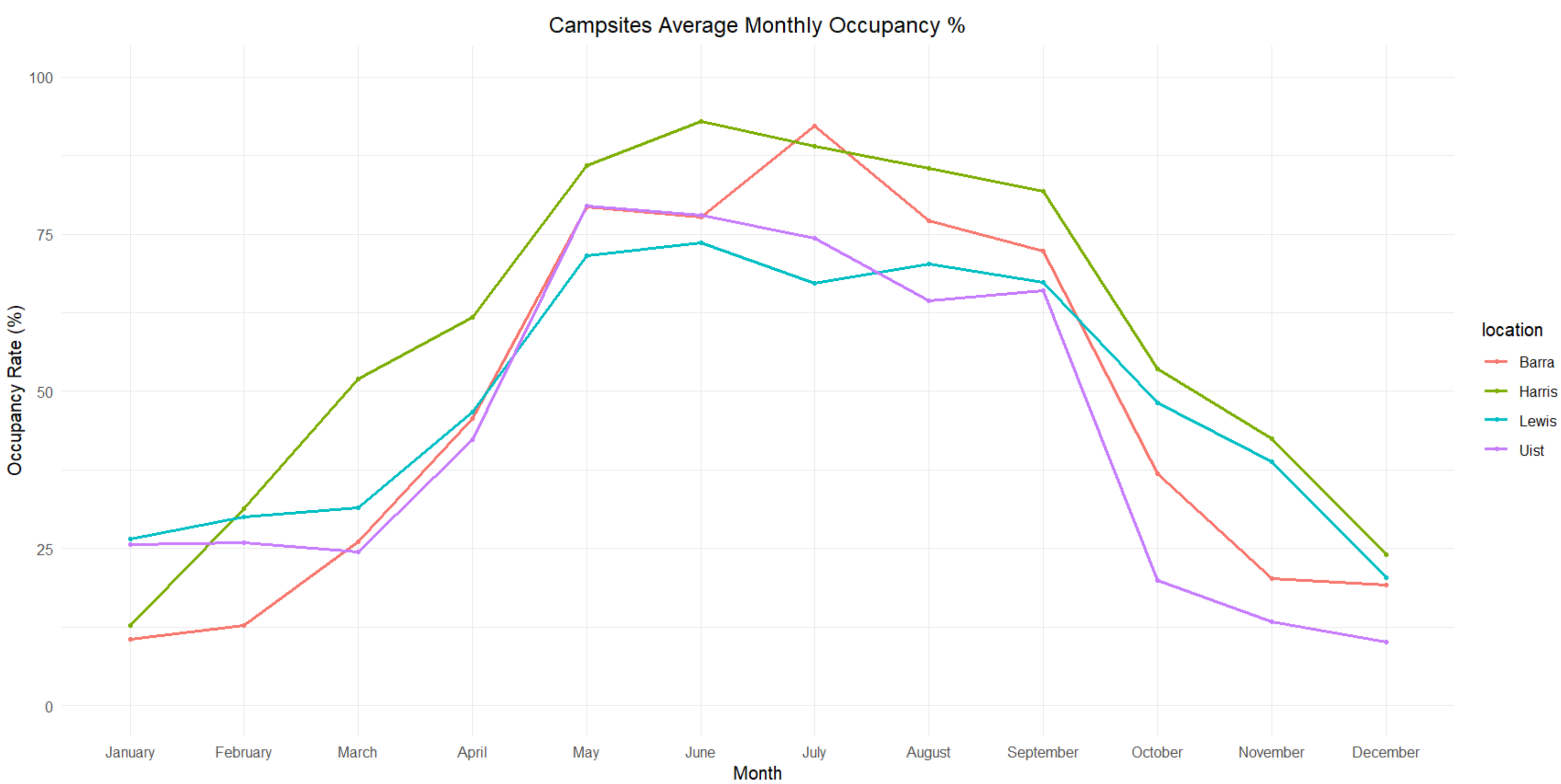
Occupancy rates - Campsites

Camping was not looked at in isolation in previous years, as there was not enough data to do so.

National average 2024 36.00%*
(* source: Scottish Accommodation Occupancy Survey 2024)

Harris has the highest average occupancy at approximately 65% while Lewis is at 40% and Uist in the mid 30s%. Uist is closest to the national average while the other island groups perform better against that measure, particularly Harris.

All four island groups broadly follow the same monthly average occupancy pattern for campsites with Harris being a little earlier in its rise at the start of the season and performing strongest overall. We can see a general trend of peaking earlier in the high season period with September being the key drop-off month for all four.

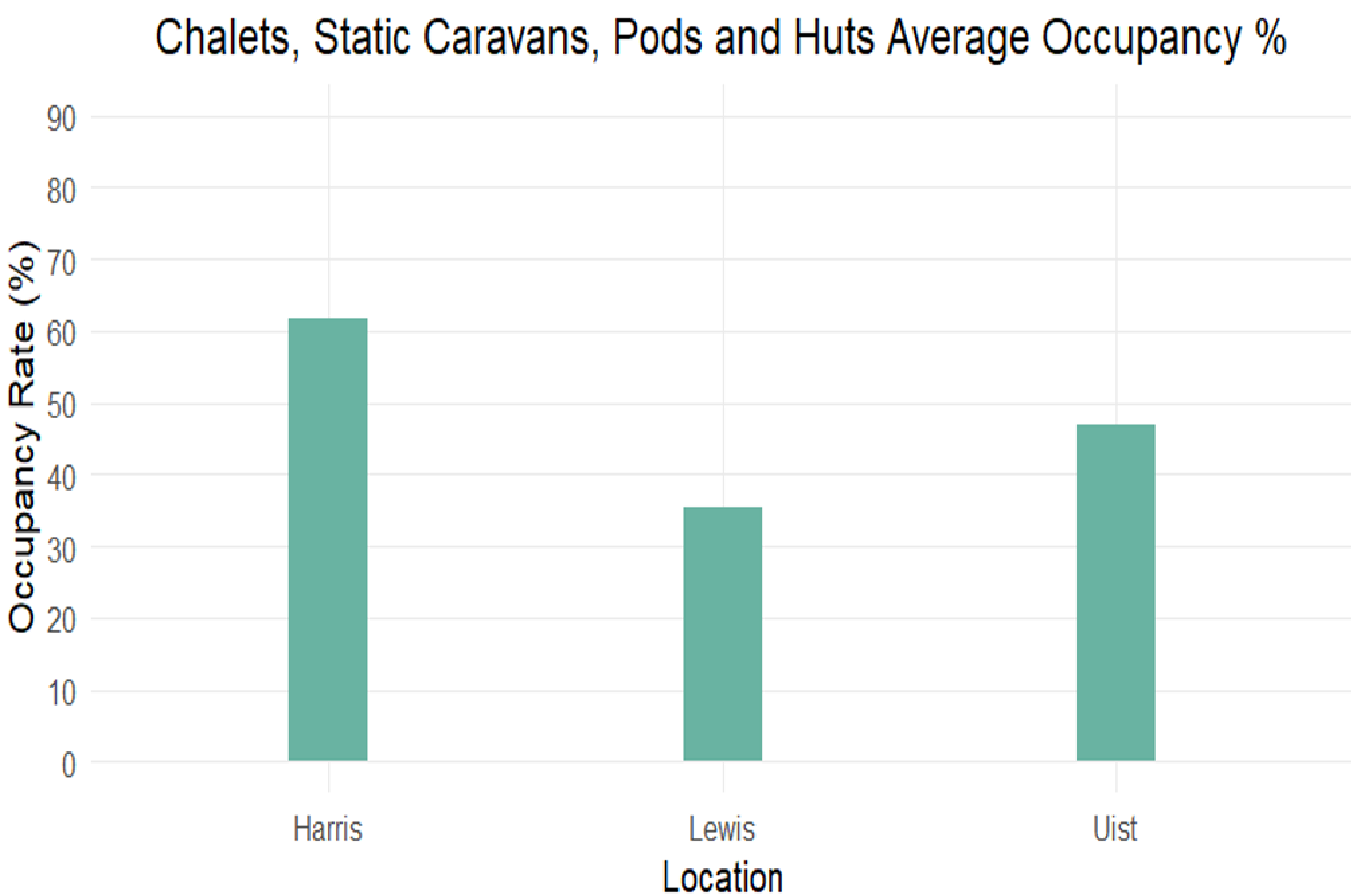


Occupancy rates - Chalets, Caravans, Pods and Huts

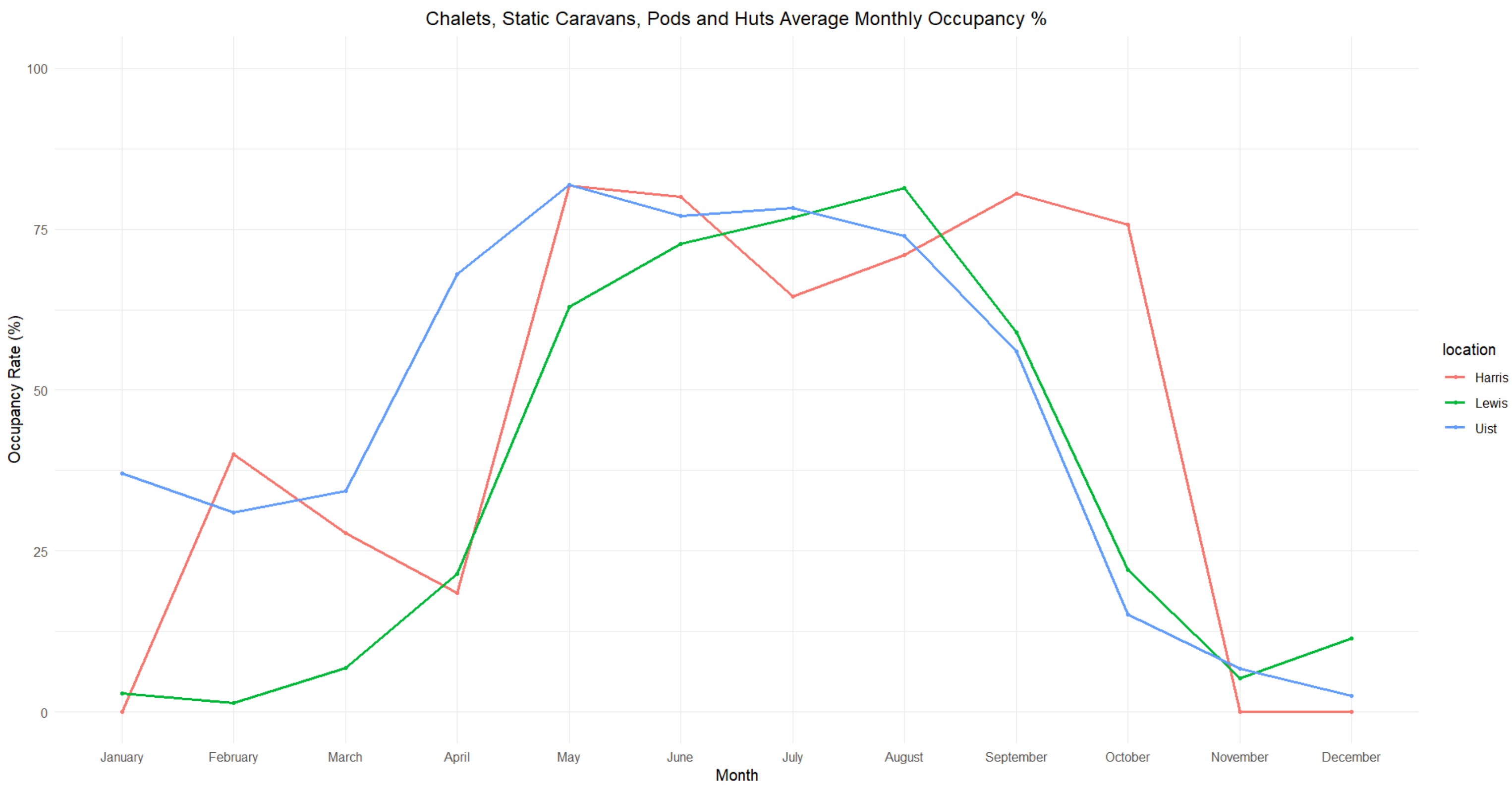
Separating out types of self-serviced accommodation within the camping group shows variation.

In the case of chalets, static caravans, pods and huts there is a different pattern to the campsites – for this sub-set Harris has the highest average occupancy with Uist second and Lewis third.

Lack of data for Barra is due to no geographically relevant survey responses being received for this category.

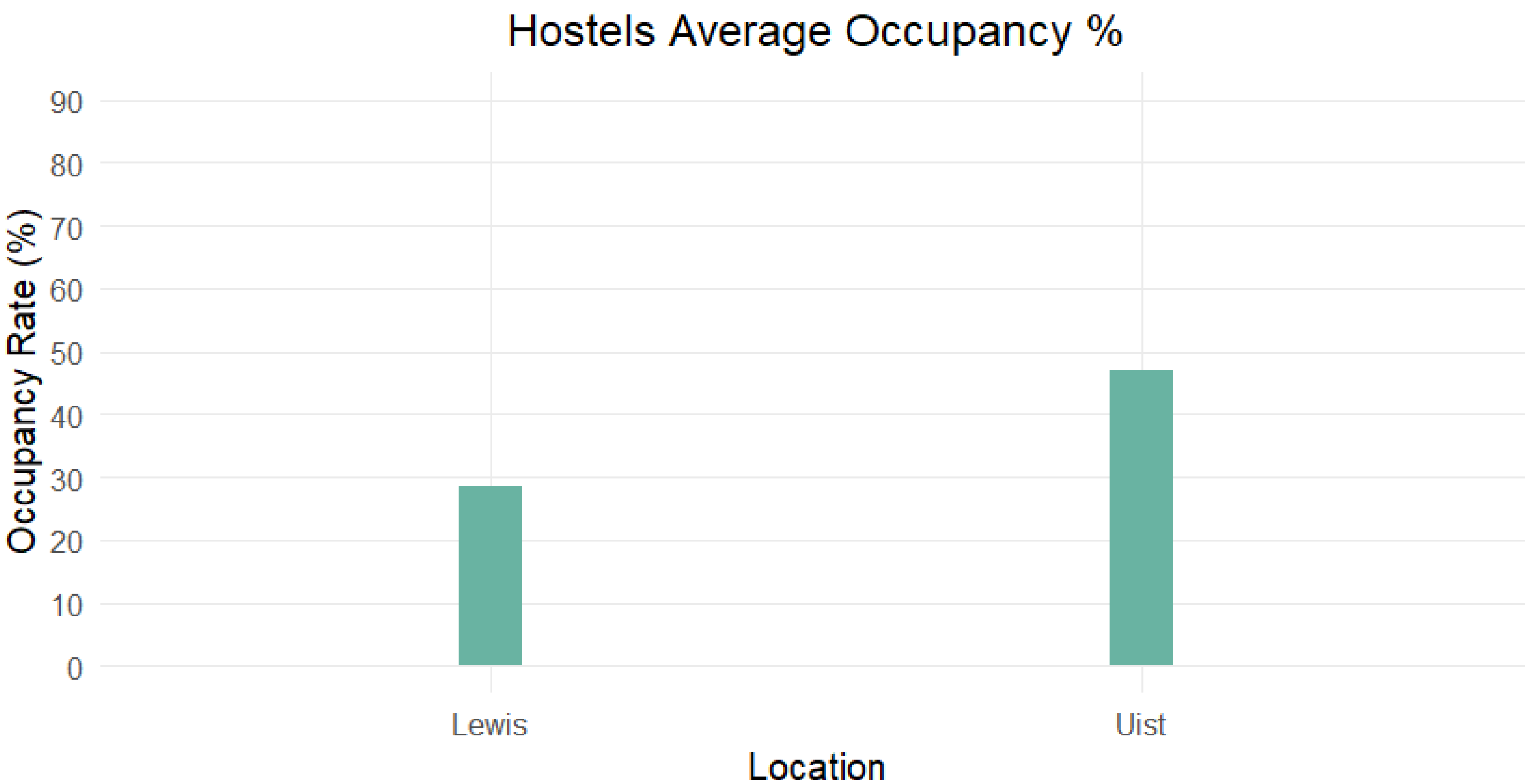


In terms of chalet / pod occupancy across the season, Uist stands out for starting off the season growth earlier in March while Harris and Lewis begin in April and by peak season all locations are more or less in sync. When it comes to the drop-off, Harris's decline starts later in October where for Lewis and Uist this decline starts in September.

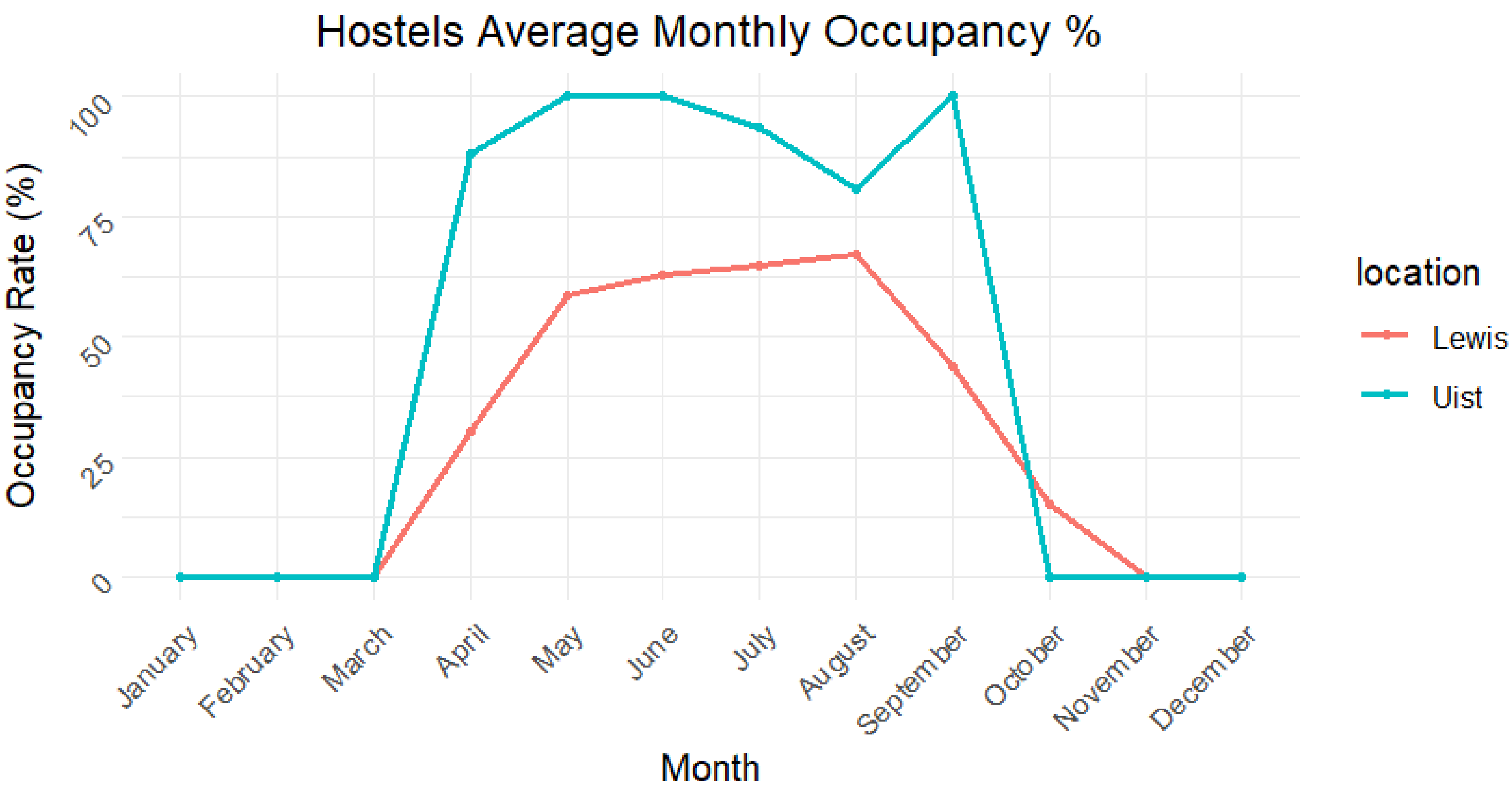


Occupancy rates - Hostels

Finally, for the hostels on the island groups we have available data for Lewis and Uist, we can see Uist has the higher occupancy level with an average of 48% while Lewis comes at just 28%. In this regard hostels are similar to chalets, static caravans, pods and huts.



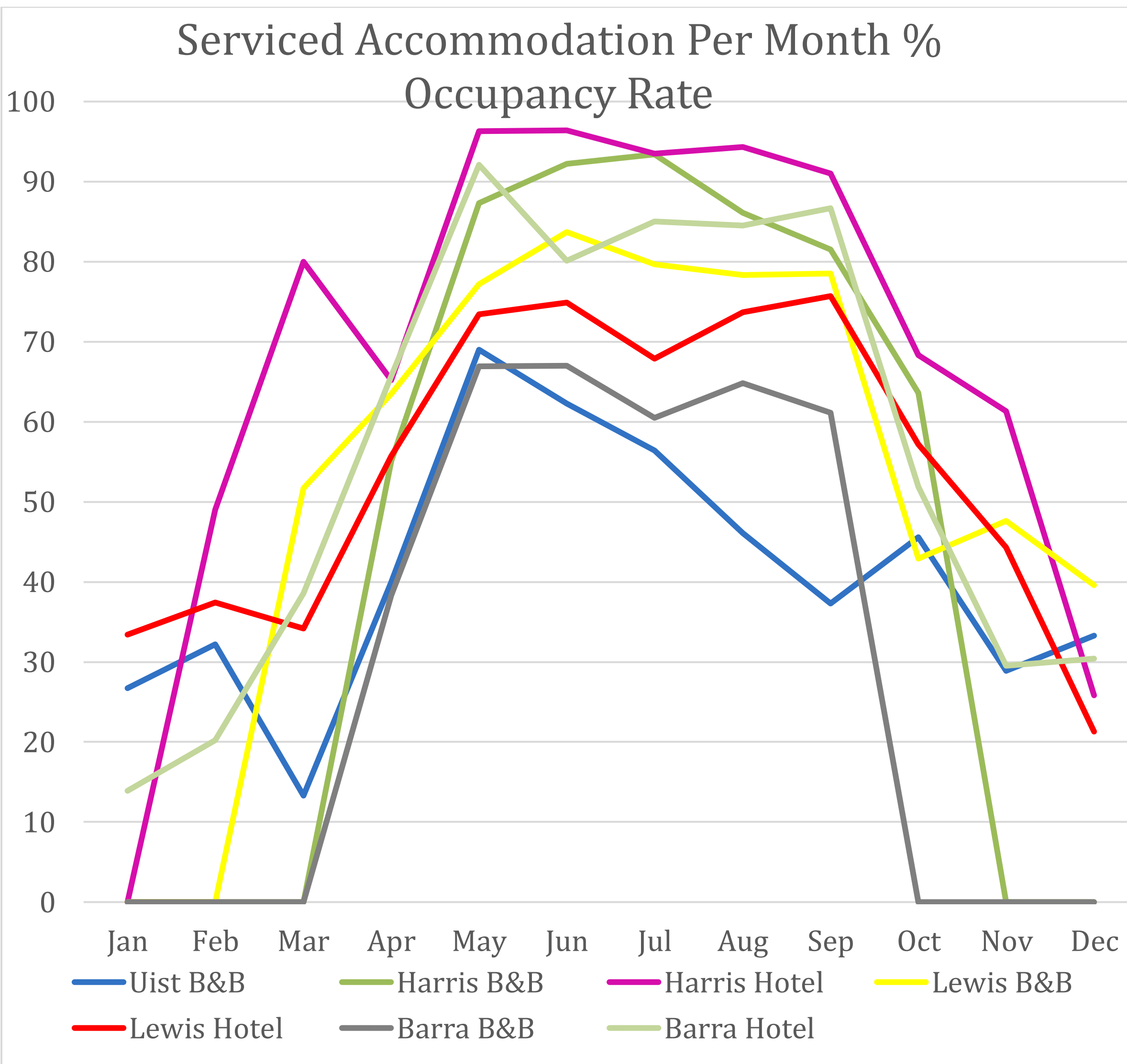
In terms of season duration for hostels, the March growth starting point is consistent, while Uist then increases significantly reaching near peak occupancy for most of the high season before dropping-off more dramatically from September. Lewis tends to reach around 60% occupancy, and the decline period starts off earlier from August, with 0% indicating closed for the season.



Occupancy Trends

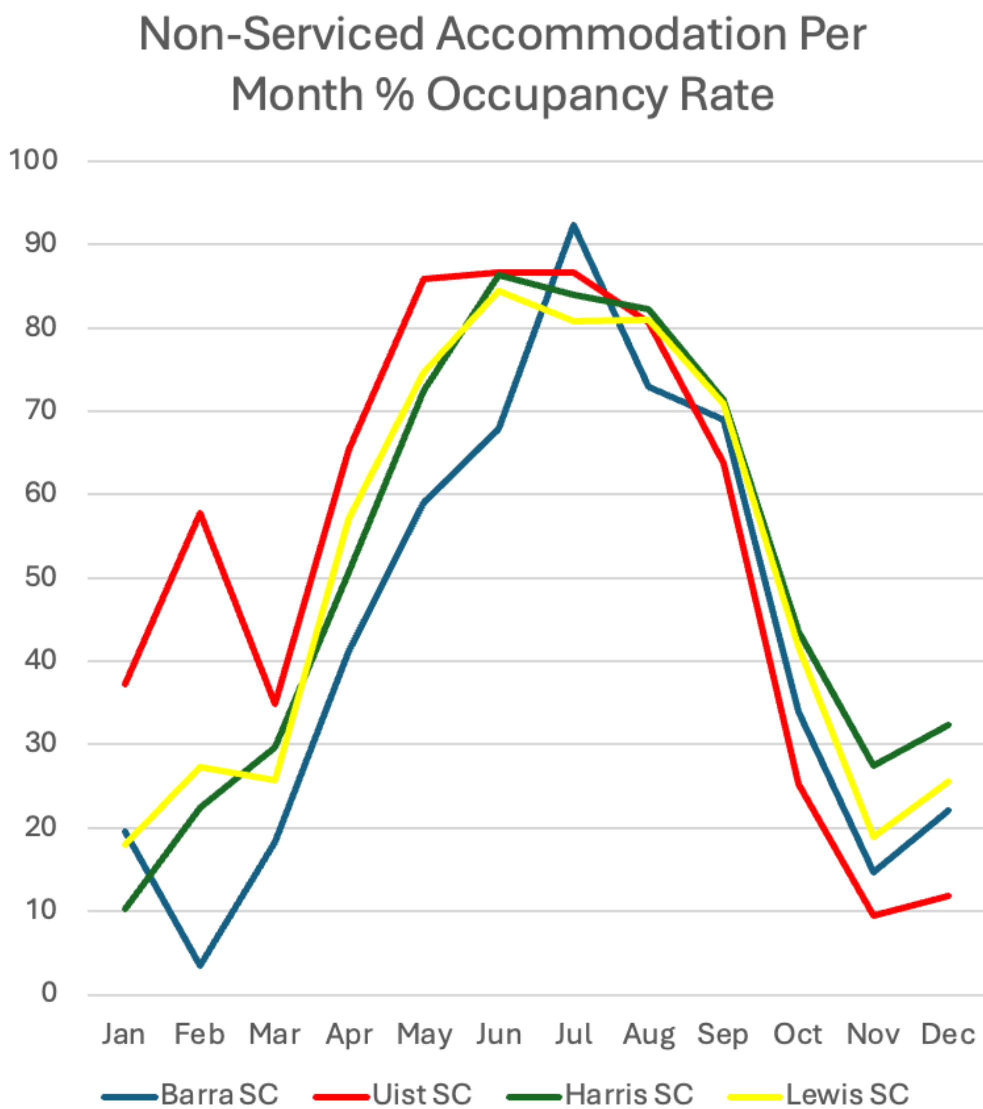
Occupancy trends - serviced accommodation

Across all island regions occupancy in serviced accommodation exceeded 68% by May. Decreasing in June and July for Uist and Barra occupancy but then increasing again to more expected levels from early autumn.
Most B&B businesses and Hotels remained open until the end of October.
Lewis and Barra hotels are above 30% occupancy for winter months. Lewis and Harris are the best performing island group in terms of extension of the main season, and in terms of overall occupancy, operating at 11-12 months of the year when compared to other island groupings.



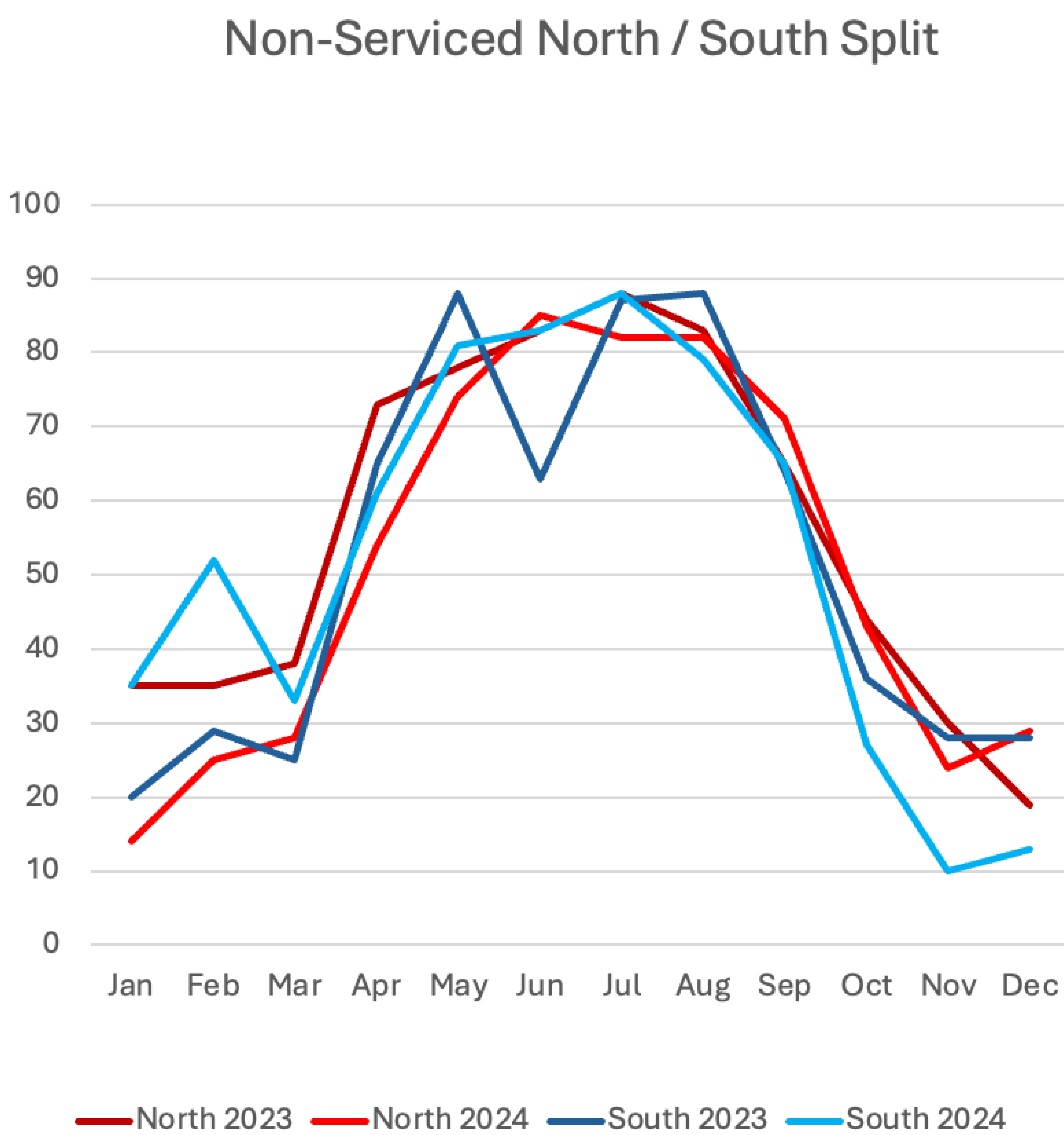
Occupancy trends - non-serviced accommodation

Across all island regions occupancy in non-serviced accommodation exceeded 80% by July and remained above 68% through June to August.

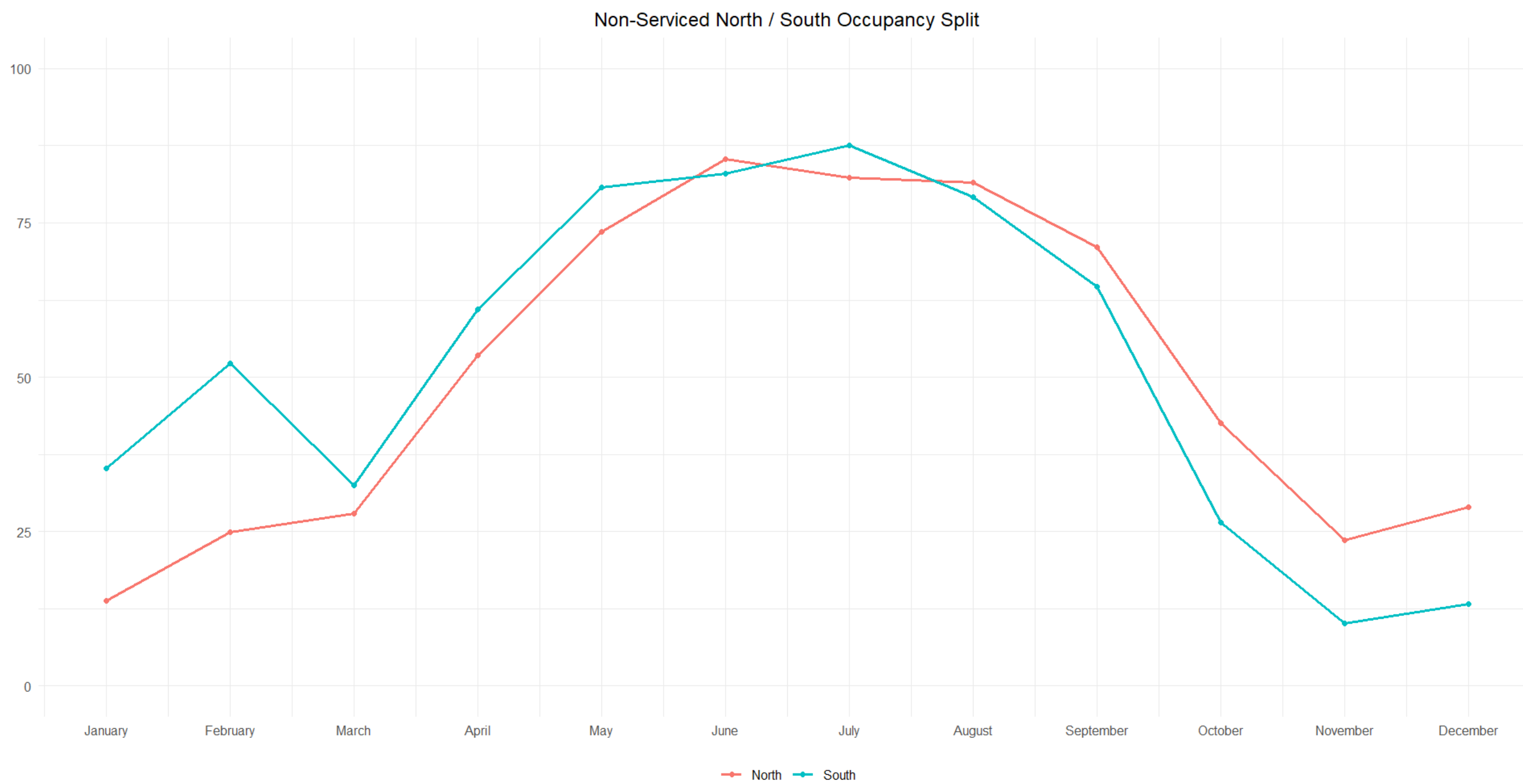


Occupancy trends - North v South non-serviced split

For non-serviced accommodation, Uist & Barra occupancy was 2.76% ahead in terms of overall occupancy throughout the year compared to Lewis & Harris. This is notable because in previous years this occupancy trend has been reversed.

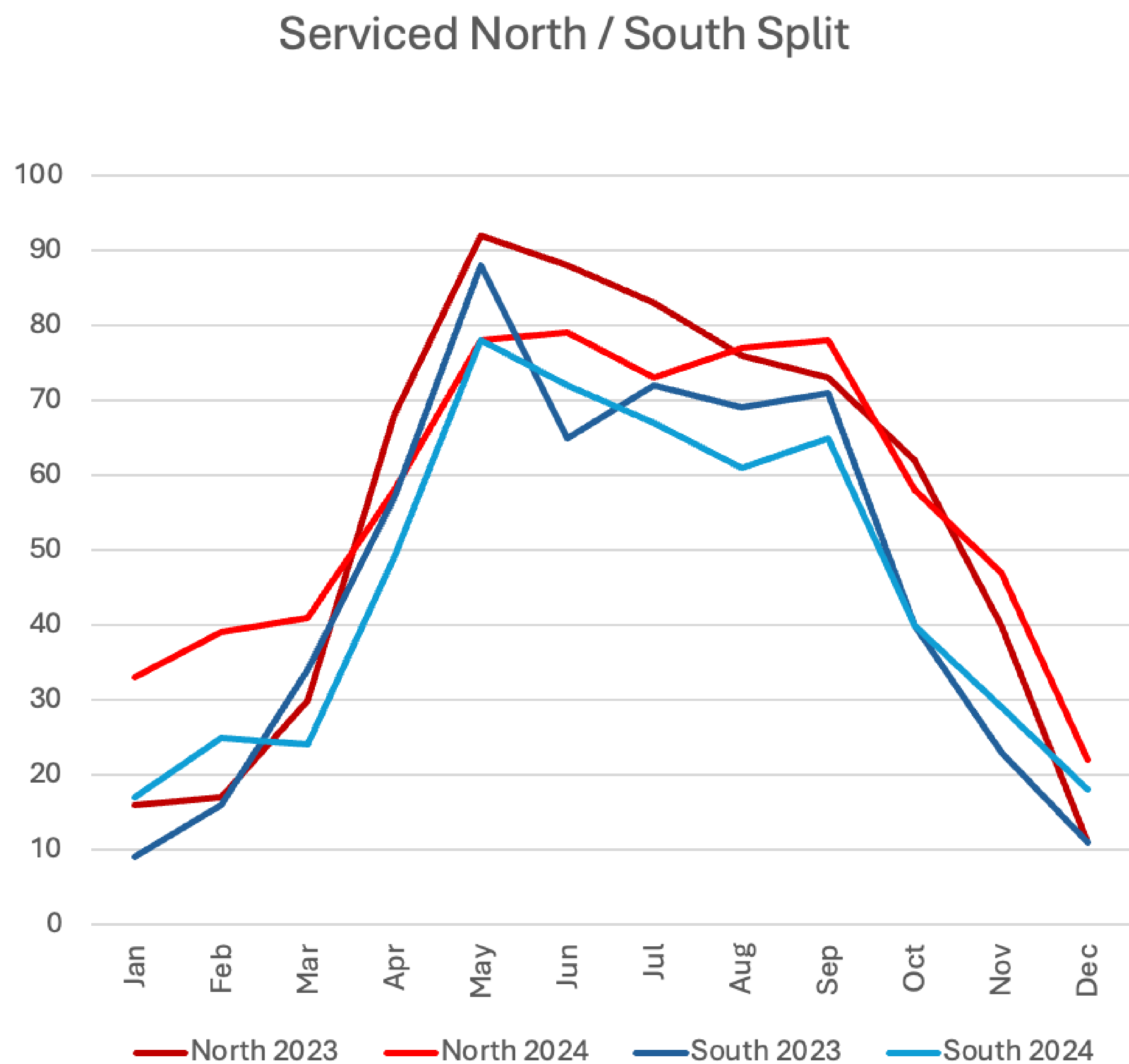


The below graph allows the 2024 data to be more distinctly differentiated and while Uist & Barra have a small overall lead (at 2.6%) there is a switch to Lewis & Harris having higher occupancy in the second half of the season.

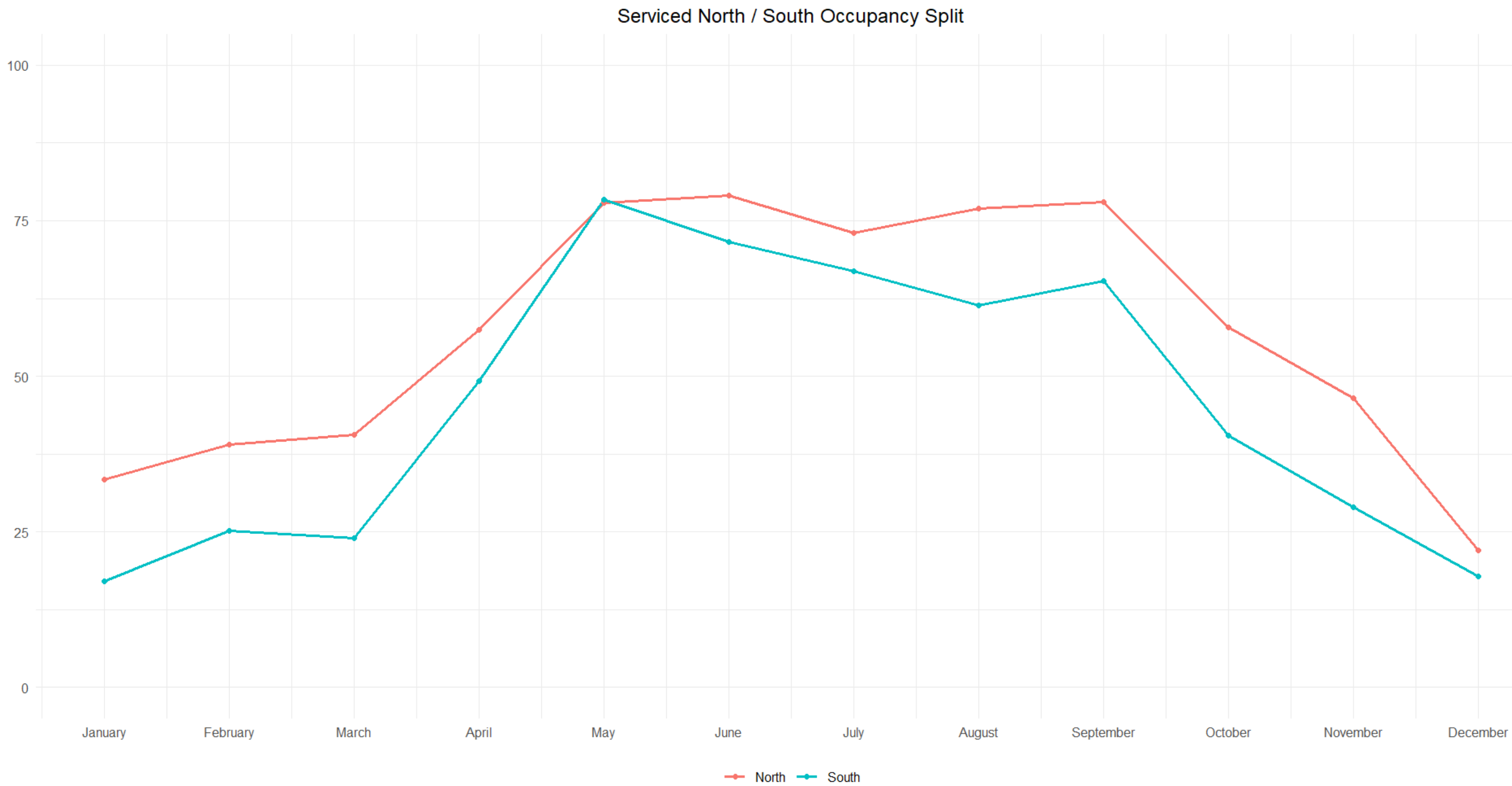


Occupancy trends - North v South serviced split

For serviced accommodation, occupancy peaked across all islands in May.
Overall occupancy for Lewis & Harris serviced accommodation is 20% ahead compared to Uist & Barra for 2024. Hotels and B&B's on Lewis and Harris that remain open in the winter months show a percentage increase of 59% on 2023* (this significant increase may be reflective of this year's particular sample of respondents.)



The below graph allows the 2024 data to be more distinctly differentiated showing the slightly higher Lewis & Harris occupancy throughout the year aside from the May peak.



Summary accommodation audit 2023-2024 comparison

Accommodation by island

	2023		2024		Variance	
	No of Providers	Capacity	No of Providers	Capacity	No of Providers	Capacity
Lewis	628	3718	610	3676	-18	-42
Harris	232	1385	237	1453	5	68
Uist	370	2116	303	2030	-67	-86
Barra	90	669	96	731	6	62
Totals	**1320**	**7888**	**1246**	**7890**	**-74**	**2**

Type of accommodation

	2023		**2024**		**Variance 2023v2024**	
	No of Providers	**Capacity**	**No of Providers**	**Capacity**	**No of Providers**	**Capacity*****
Hotel	28	844	29	898	1	54
B&B / GH	133	716	111	612	-22	-104
Sporting Estate	8	106	8	111	0	5
Self-Catering/Serviced Apartments**	1064	5132	947	4847	-117	-285
Camping Parks/Overnight Parking spots	26	533	29	726	3	193
Hostel	15	247	15	247	0	0
Pods / Chalet / Static Caravans**	43	247	107	449	64	202
Other	3	63	0		-3	-63
Total	**1320**	**7888**	**1246**	**7890**	**-74**	**2**

** Fluctuations in Self Catering and Pods categories are partly due to separating out caravans from the self-catering category. The self-catering category is now only houses, cottages, apartments and no longer includes chalets and caravans.

*** Capacity and Number of providers - we have been able to get a more accurate reflection of capacity and number of providers operating thanks to the STL licence.

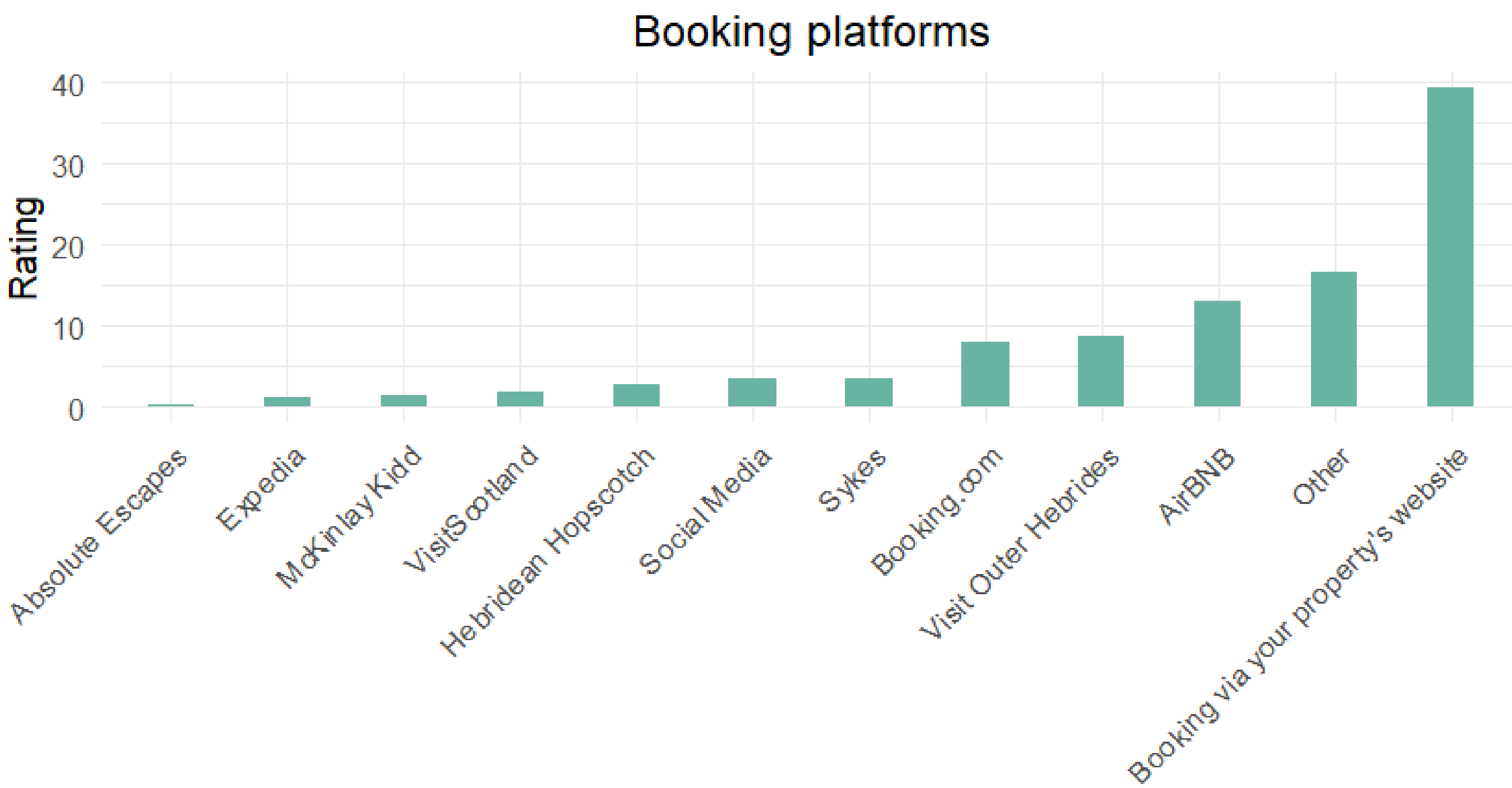
Bed nights

Total Capacity in 2024 was 7890 beds per night

With an average occupancy across all accommodation types at 57% per annum, we can roughly calculate the number of bed nights per annum at 1,641,514. There were approx. 1,789,128 bed nights in 2023. A decrease of 8.2%.

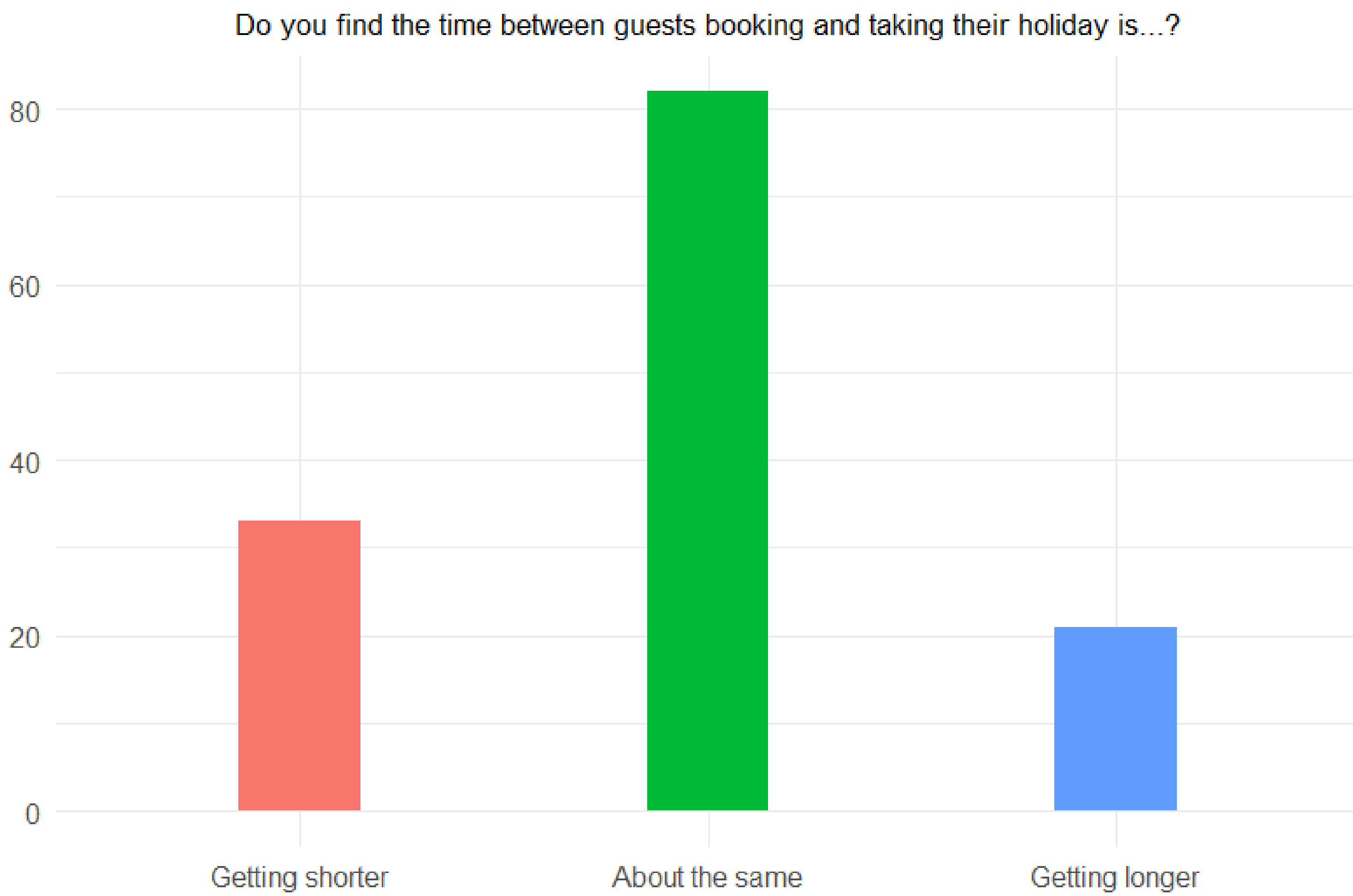
Booking platforms and patterns

Booking via the property's own website remains the most popular source for business, which contradicts wider nationwide sector trends where OTA's such as Booking.com are dominant.



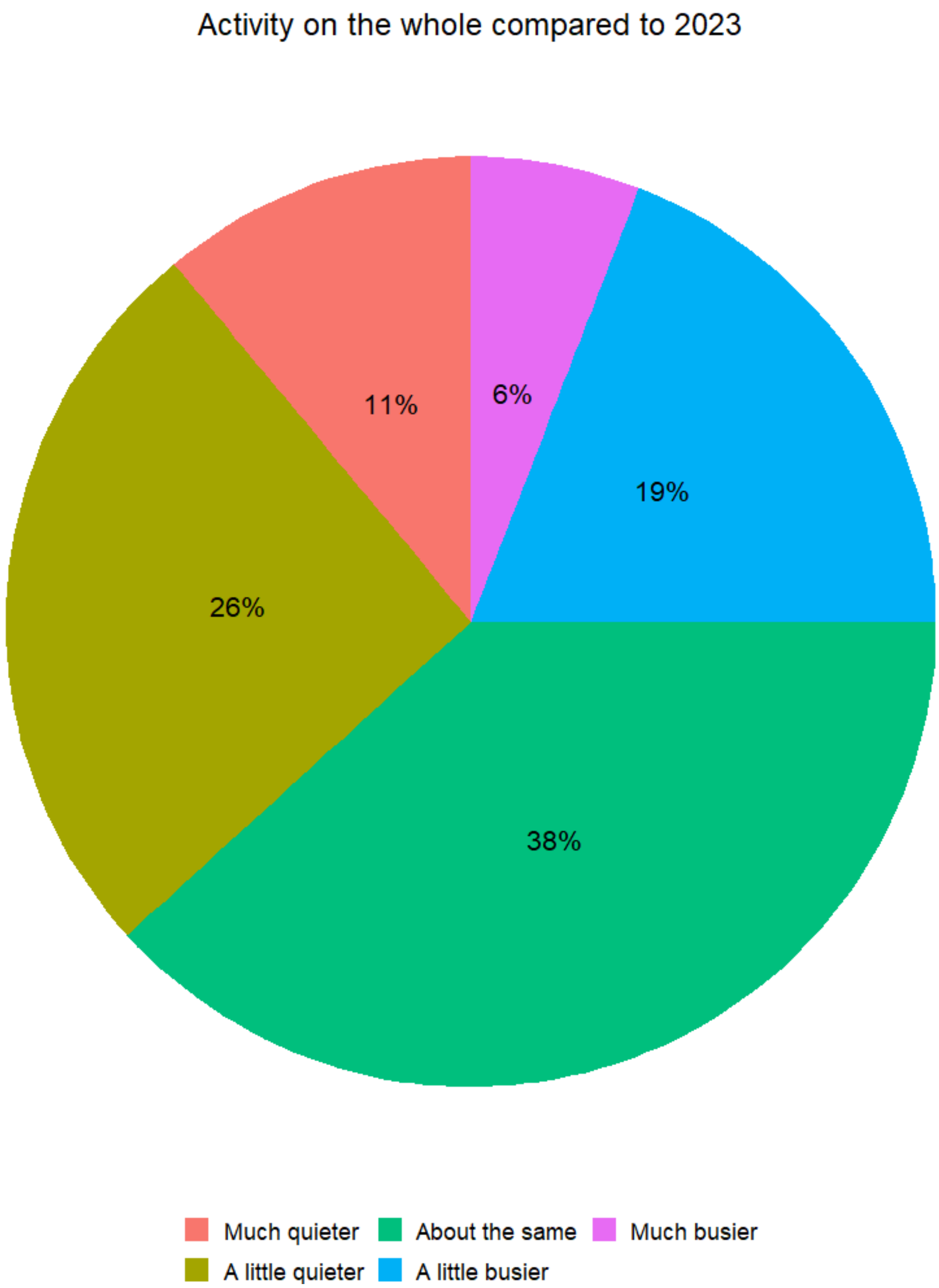
Booking - lead time

In terms of lead time between guests booking and taking their holiday, the recent trend of guests planning further ahead when booking serviced accommodation continues, however 2024 data suggests last minute bookings are on the increase.

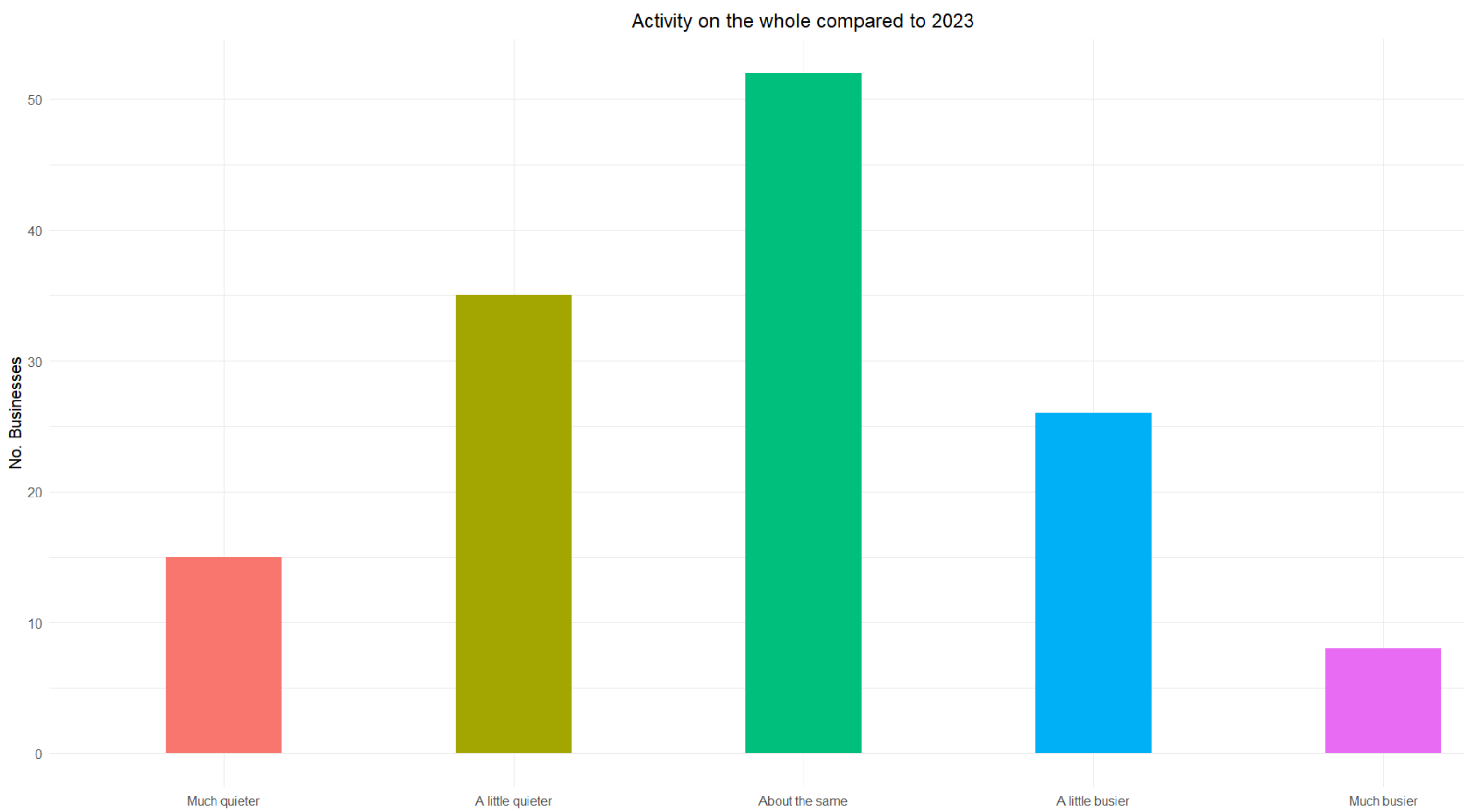


Comparing perceptions of how busy businesses are

Whilst the overall picture shows 58% businesses reporting it to be the same, or busier than the previous year, 42% of businesses stated 2024 was quieter than 2023.
Notably, those reporting it to be <u>much</u> quieter than 2023 have increased from 1 business to 21 businesses.



The following graph helps further illustrate the emphasis on perceiving activity slightly more towards the quieter rather than busier side, even if the majority percieve it to be about the same overall.



Estimating Maximum Monthly Spend of the Visitor

For each island group, we present the capacity (the number of **beds**, not units), the average price, and the *maximum possible spend on accommodation* if every bed was filled every night. This modelling is an estimate based on average figures for pricing and occupancy and calculated top-down.

The ‘total occupancy’ level - shown by the red horizontal line - is the spend if every bed was available and filled every night; this is the theoretical maximum. The accommodation spend (red bar) cannot go above this line. This gives us a measure of unfilled potential – the gap between the top of the red bar, and the red line, in each chart.
While total occupancy is not realistic for much if any of the year, in practice, Harris does come closest in the summer months.

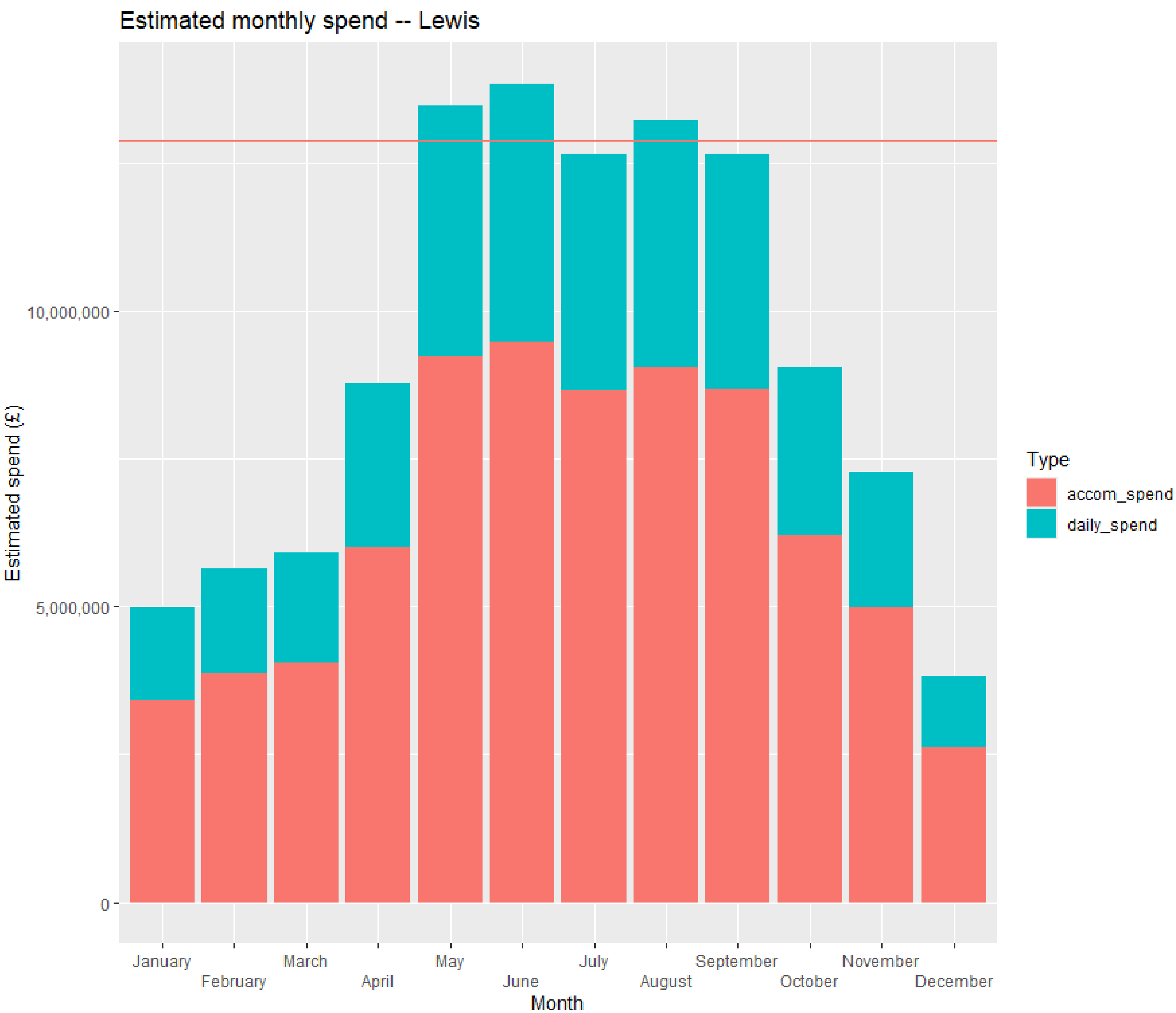
For additional visitor spend beyond accommodation, we have used VisitScotland’s estimate of £53/day per person as it is the most recent source applicable to Scotland. This visitor spend can be viewed in terms of meals, visitor attractions, gifts, etc. and it excludes transport costs. The additional spend is shown by the blue bar; the top of which indicates the total estimated spend, and this of course can exceed the maximum accommodation spend. When comparing additional visitor spend it is worth noting the Y-axis differences in total amount - Lewis has the highest additional visitor spend, followed by Harris, Uist and then Barra with the least.

Headline figures are summarised in the table below, and monthly breakdowns for each island group are shown in the following charts.

Location	Max. bed Capacity	Mean Accom. price (£) pp	Theoretical max monthly Accom. spend (£)
Barra	731	120.00	2668150
Harris	1453	138.70	6129904
Lewis	3676	115.13	12872877
Uist	2030	92.00	568061

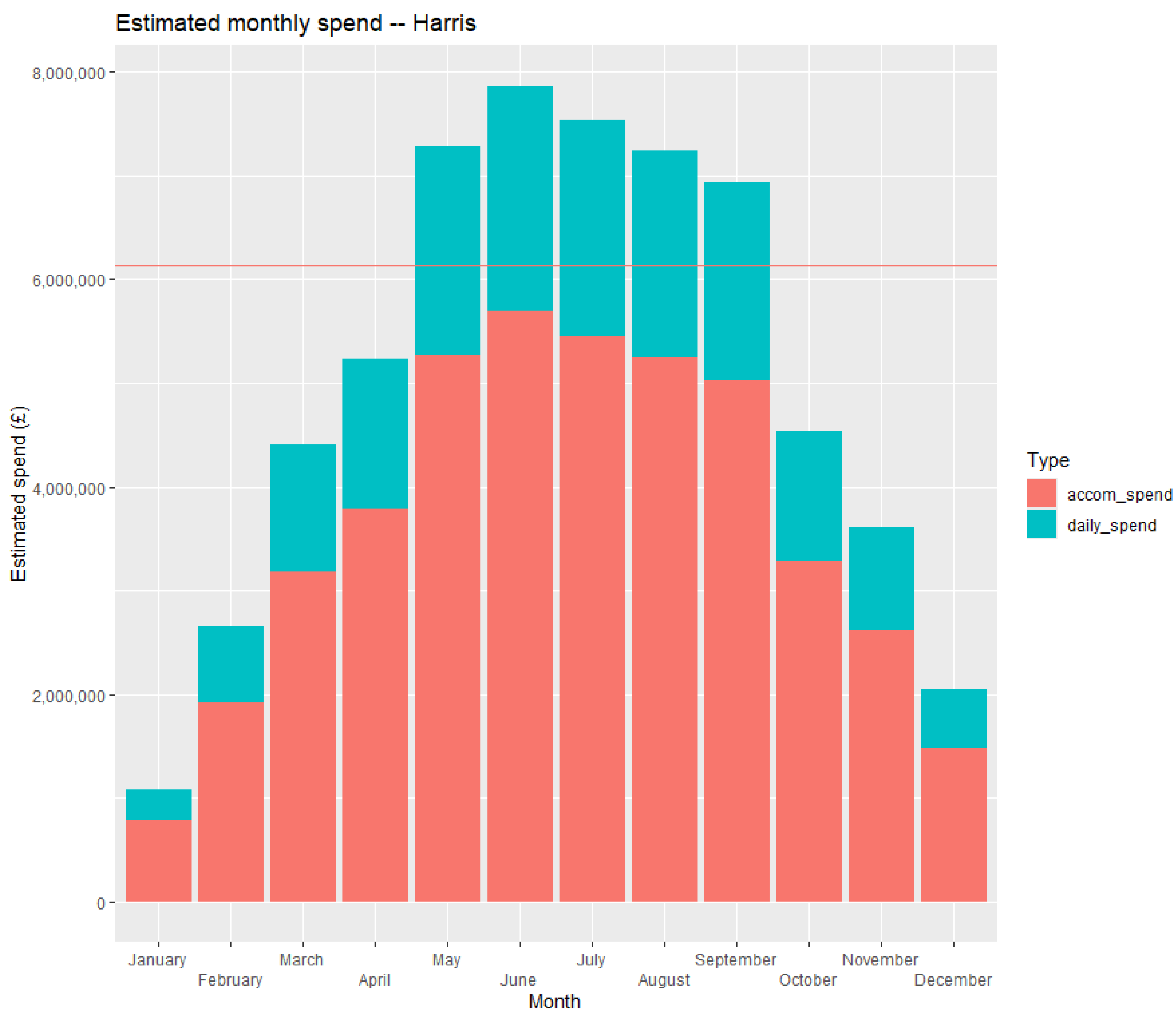
Estimating monthly visitor spend – Lewis

Lewis shows noticeable unfilled capacity even during the summer months, although it does benefit from better performing shoulder and low season months. As mentioned above, Lewis has the strongest performing additional visitor spend of all the islands peaking at over £13m. This is not unsurprising given Stornoway in Lewis is the only commercial centre in the Outer Hebrides and in addition the town benefits more than other areas from the spend of day visitors arriving via cruise.



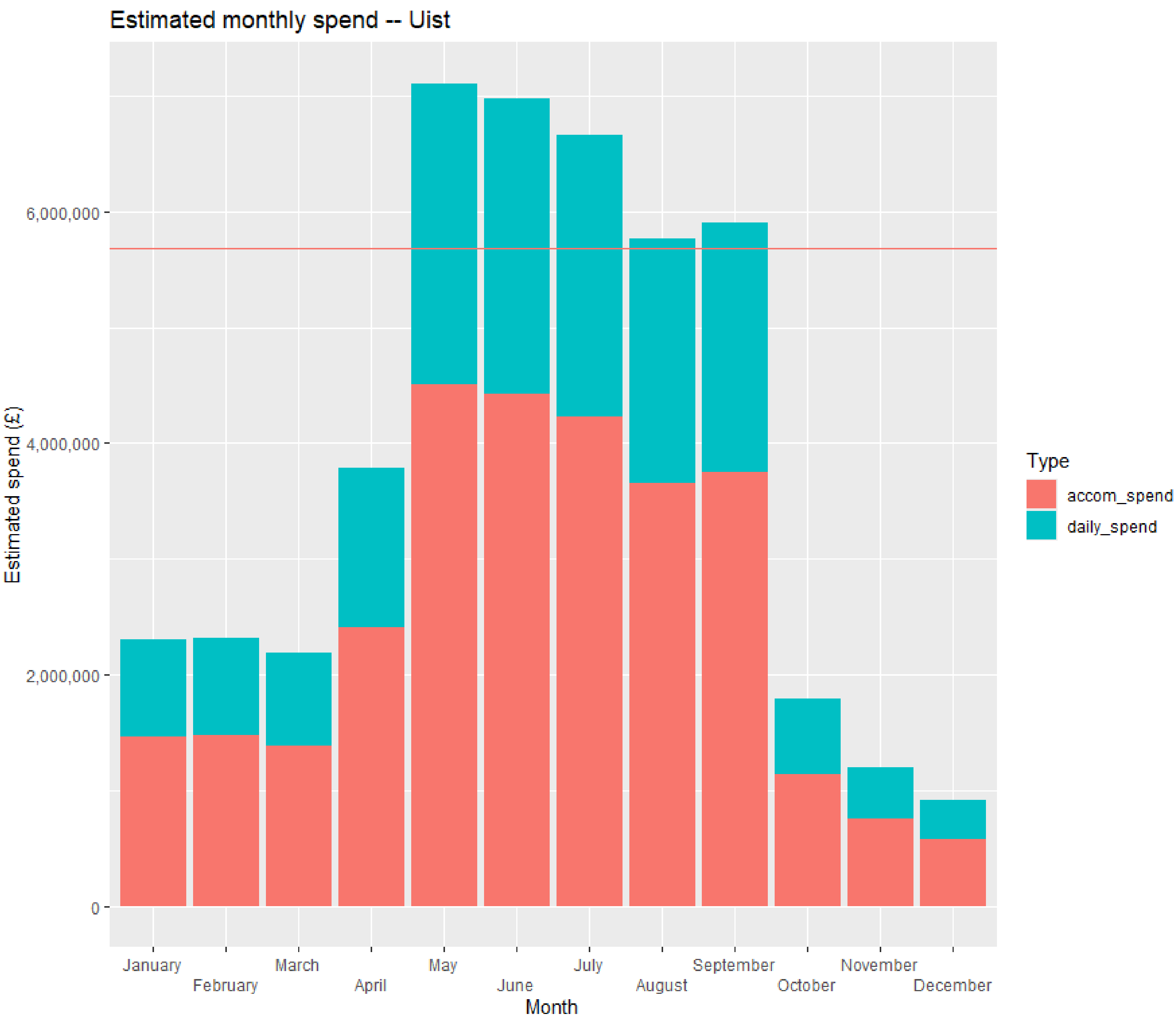
Estimating monthly visitor spend – Harris

In the case of Harris, we can see that in the summer months accommodation spend comes closest to the theoretical maximum in June, indicating close to 100% occupancy. Harris's additional visitor spend peaks at just under £8m in June.



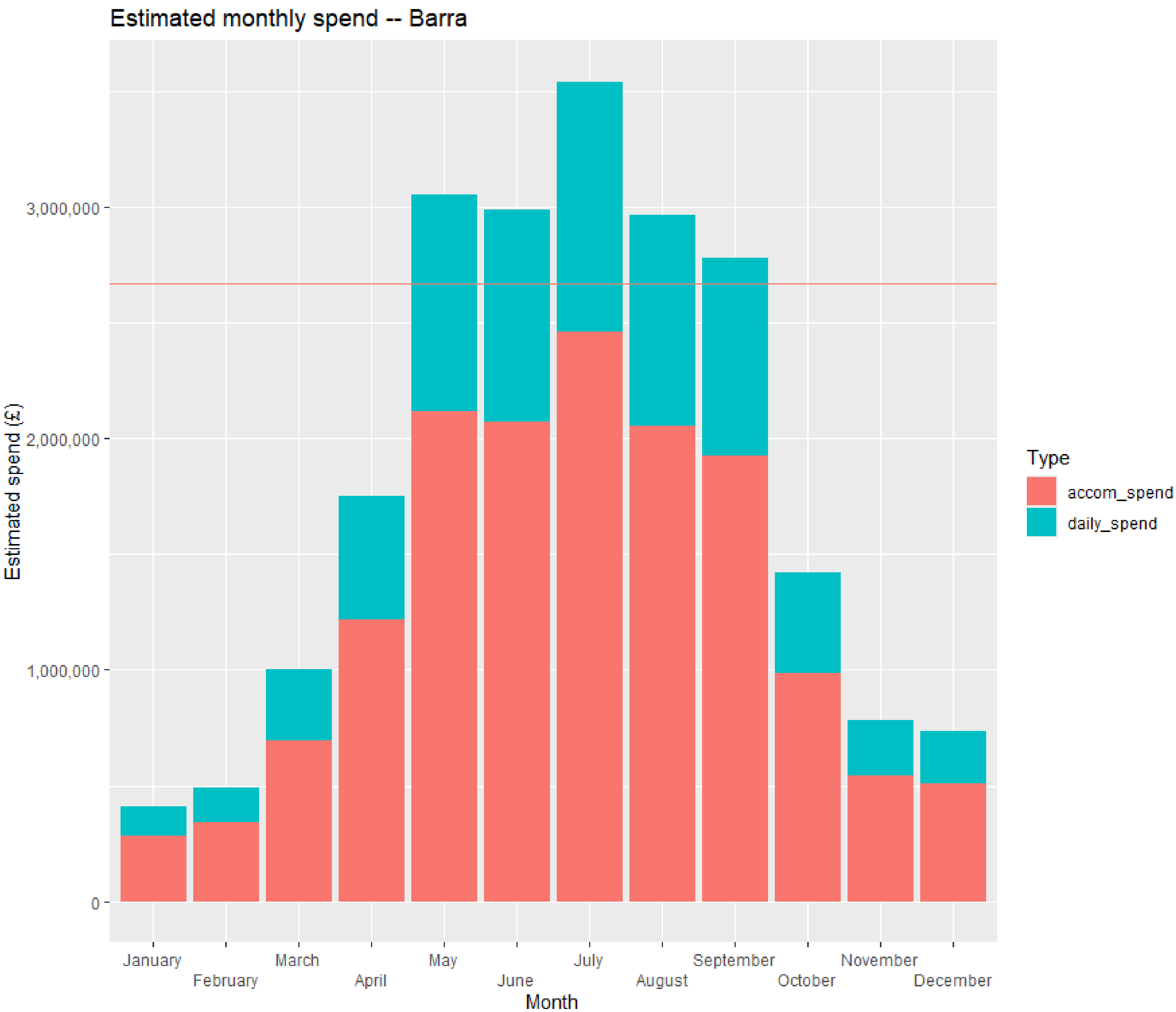
Estimating monthly visitor spend – Uist

Like Lewis, Uist still has unfulfilled occupancy potential in the high season with peak additional visitor spend comparable to Harris, although a little less at just over £7m. Based on those who responded to the survey, there is a more significant drop-off in visitor spend in Uist during the winter due to some businesses not operating in the low-season months.



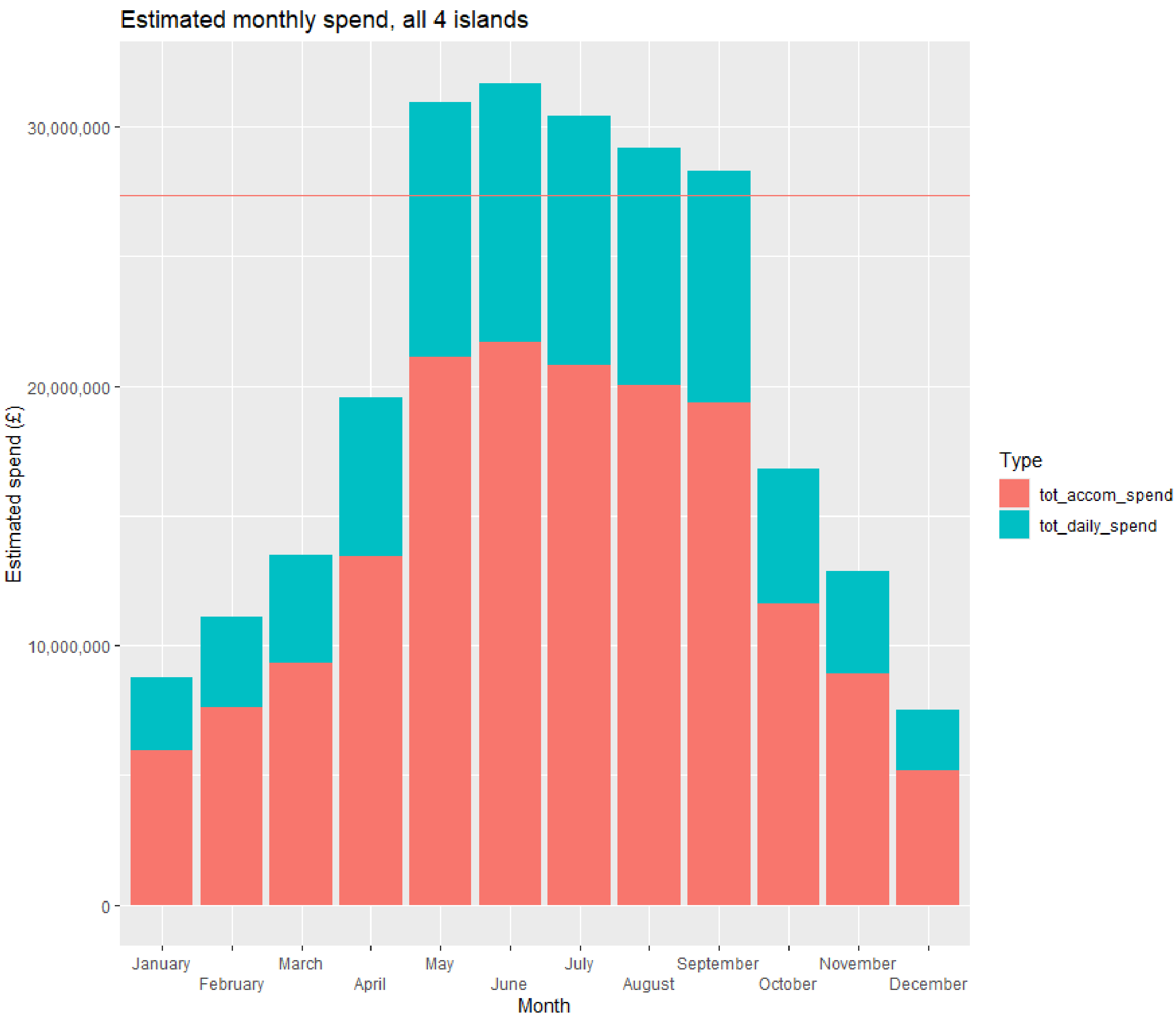
Estimating monthly visitor spend - Barra

Barra comes closest to peak occupancy in July but otherwise also has unfulfilled occupancy in the main season. Additional visitor spend is the lowest of the four islands groups, peaking at just over £3.5m in July. As with Uist, there is a more notable drop-off in monthly spend in the low season as much accommodation shuts in October.



Estimating monthly visitor spend - Outer Hebrides as a whole

The below graph shows visitor spend across all island groups combined, indicating the general trend of additional capacity in the high season with the lower season still performing well but at lower levels. Lewis tempers the low-season drop-off that is more pronounced on the other islands.



Overall there is a peak monthly visitor spend of just over £30m in June and this remains reasonably steady for most of the peak months, dropping off more significantly in April and September, and then tapering further but at a steady rate over the rest of the year.

Insights from CalMac ferry data

This section provides insights from ferry data highlighting monthly:

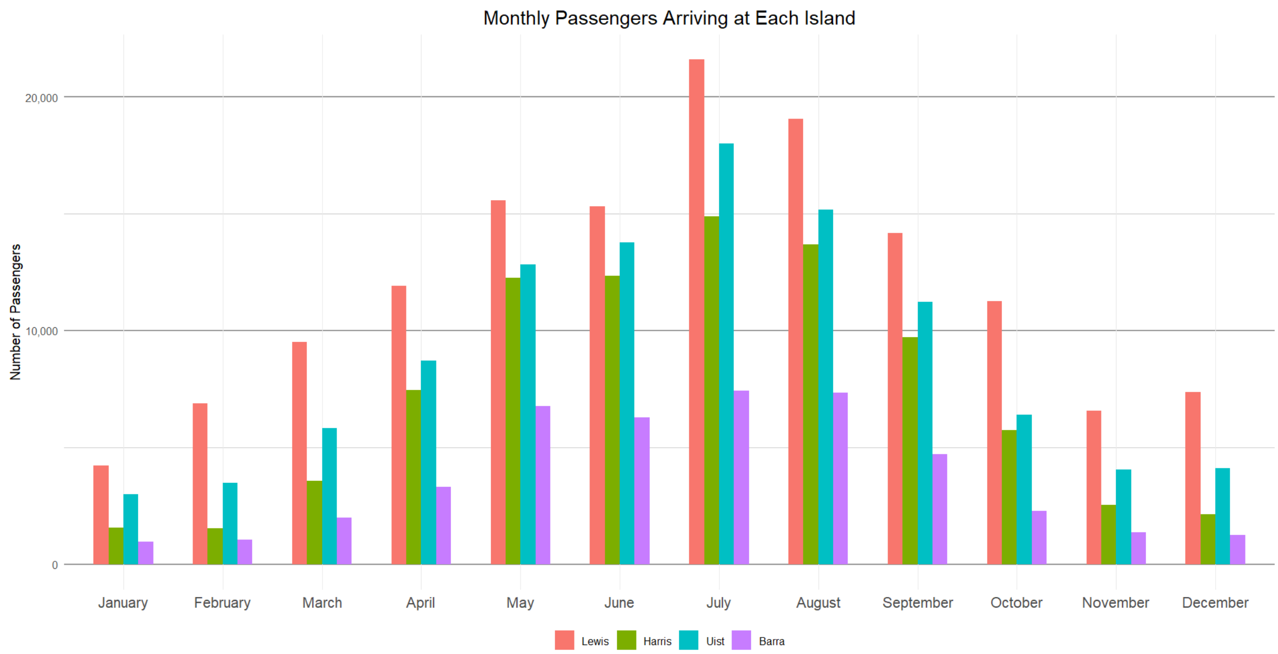
- overall passenger arrivals vs visitor arrivals
- arrivals at each port
- vehicles arriving at each port
- inter-island vehicle movement
- popularity of ferry journeys (legs)
- net flux of passengers by island

When looking at individual port passenger numbers it is worth remembering choice of ferry is based on where they are starting their journey from rather than going to, for example, a visitor originating from Inverness heading to Harris may well opt to travel via Ullapool and arrive in Stornoway to minimise mainland travel time.

Monthly passenger vs visitor arrivals by island

The following sections make use of total passenger data, but in this first section we have sought to illustrate an informed estimate of what actual visitor data might look like, Assuming February as a baseline for local-only ferry traffic.
While not exact it does give an indication as it was not possible to gain a more exact insight into visitor vs island-resident activity the specific dataset supplied.

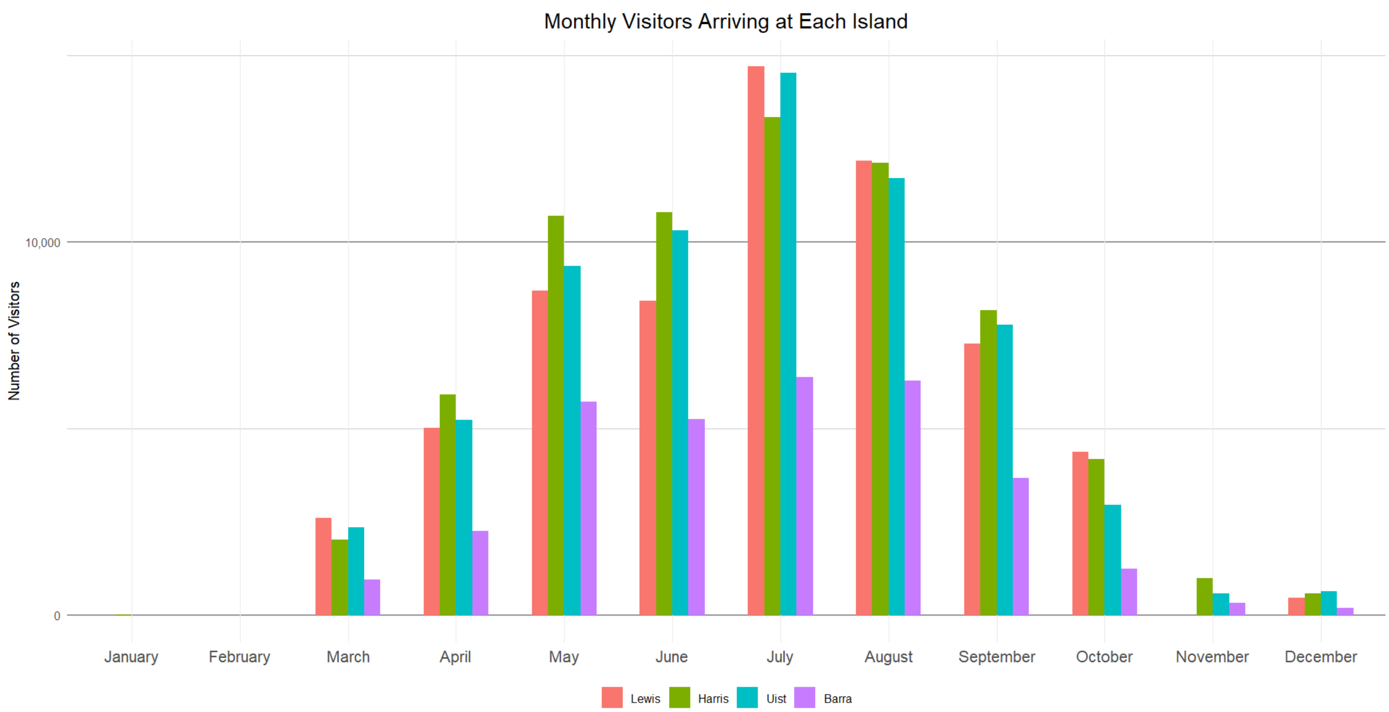
The first graph illustrates monthly passengers arriving at each island group. In the low season months Harris and Barra are closer together in terms of numbers whereas in higher season months Harris activity rises significantly closer to Uist levels.



Using the below February baseline figures as representative of local traffic for each island, the following graph shows how this translates into the equivalent of the previous graph but this time showing visitor numbers only.

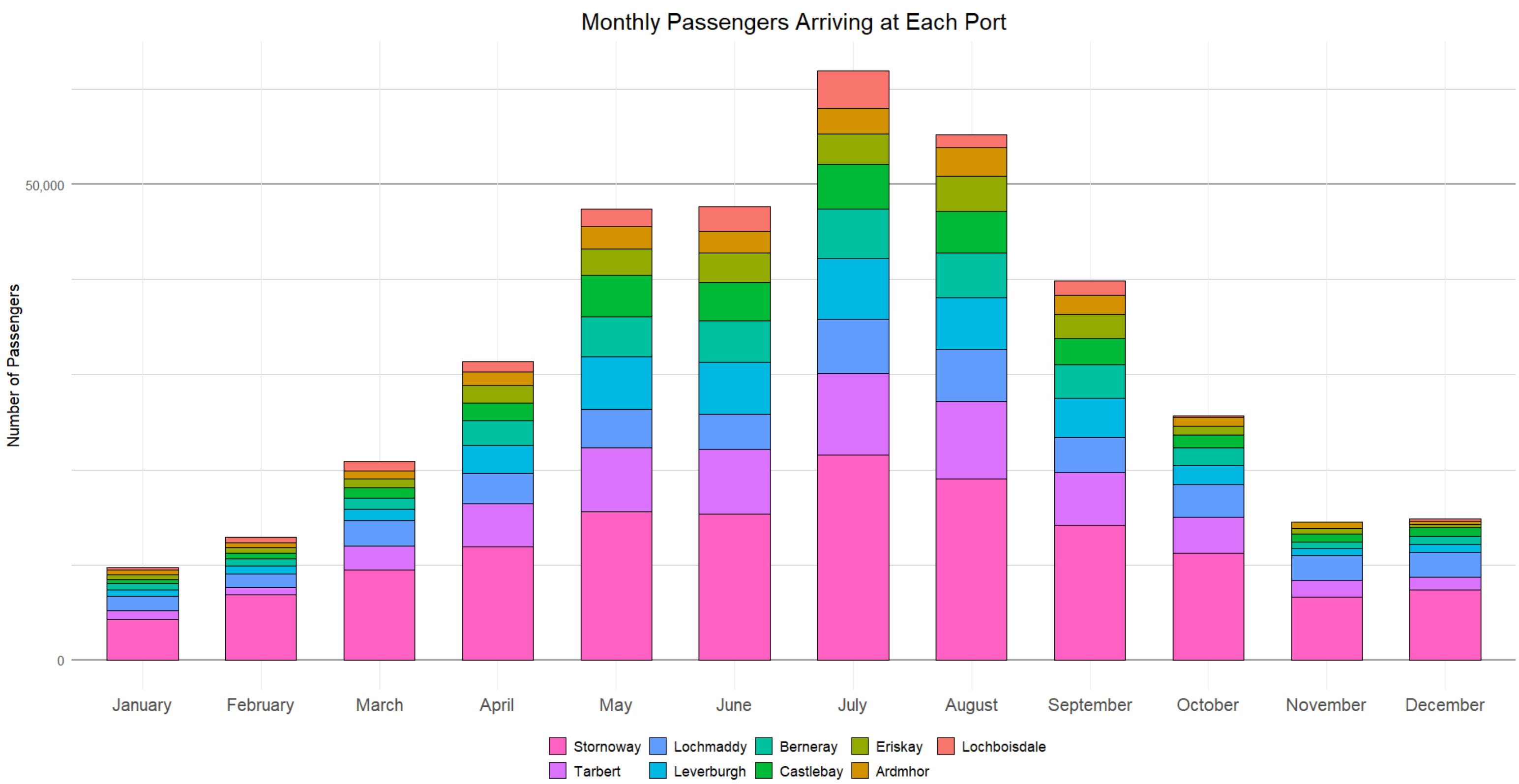
Island	February Baseline
Lewis	6896
Harris	1549
Uist	3467
Barra	1039

This adjustment results in some interesting differences, diverging from the patterns outlined in the previous description of overall passenger traffic on Outer Hebrides ferry routes.
In the visitor only estimate we see Harris leading traffic from April to June as well as, or a close second, in Aug to Dec. In terms of the second most popular visitor route Uist has the edge over Lewis April to June but varies at the other end of the season with Lewis tending to have a slight lead from July onwards. Barra's pattern remains the most stable in-line with the previous graph.

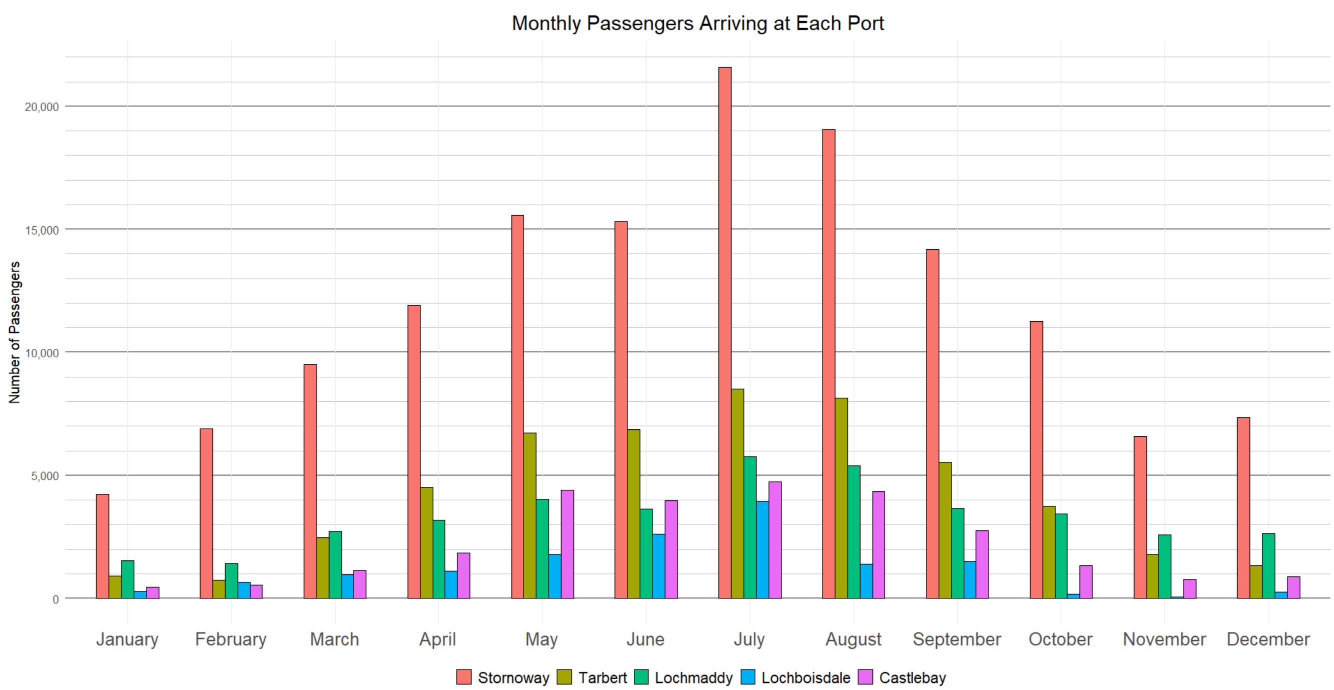


Monthly passenger arrival at each port

The following graph captures overall *passenger* arrivals at each of the Outer Hebrides ports. The first graph is useful for spotlighting totals as well as giving a sense of proportion to the individual port activity for each month. A traditional high/low season pattern is present albeit with a strong overall peak in the latter months of the high season reaching over 60,000 passengers in July and 55,000 in August. May, June and September all remain in the 40,000s range with steady gradients into the low season. It is also possible to see the proportions that each port contributes to the total, with Stornoway being the most significantly busy port, followed by Tarbert.



In the below variant, the distinct difference in *passenger* numbers between each port are emphasised. Here it is evident that Stornoway (Lewis) is the lead arrival port by a significant margin (more than double Tarbert) with Tarbert (Harris) being 2nd in most other months. As a general rule Lochmaddy (North Uist), then Castlebay (Barra) and Lochboisdale (South Uist) follow, although there are some individual month variants to their order and degree of difference.
In the main season (Apr-Oct) only Stornoway reaches the 10,000 to 20,000+ range of passengers, while Tarbert's equivalent is in the 3,000-9,000 range. In a similar period (Apr-Sept), Lochmaddy, Castlebay and Lochboisdale range from 1,500-6,000, but it should be noted from August onwards Lochboisdale starts to experience comparatively significant drops until January.



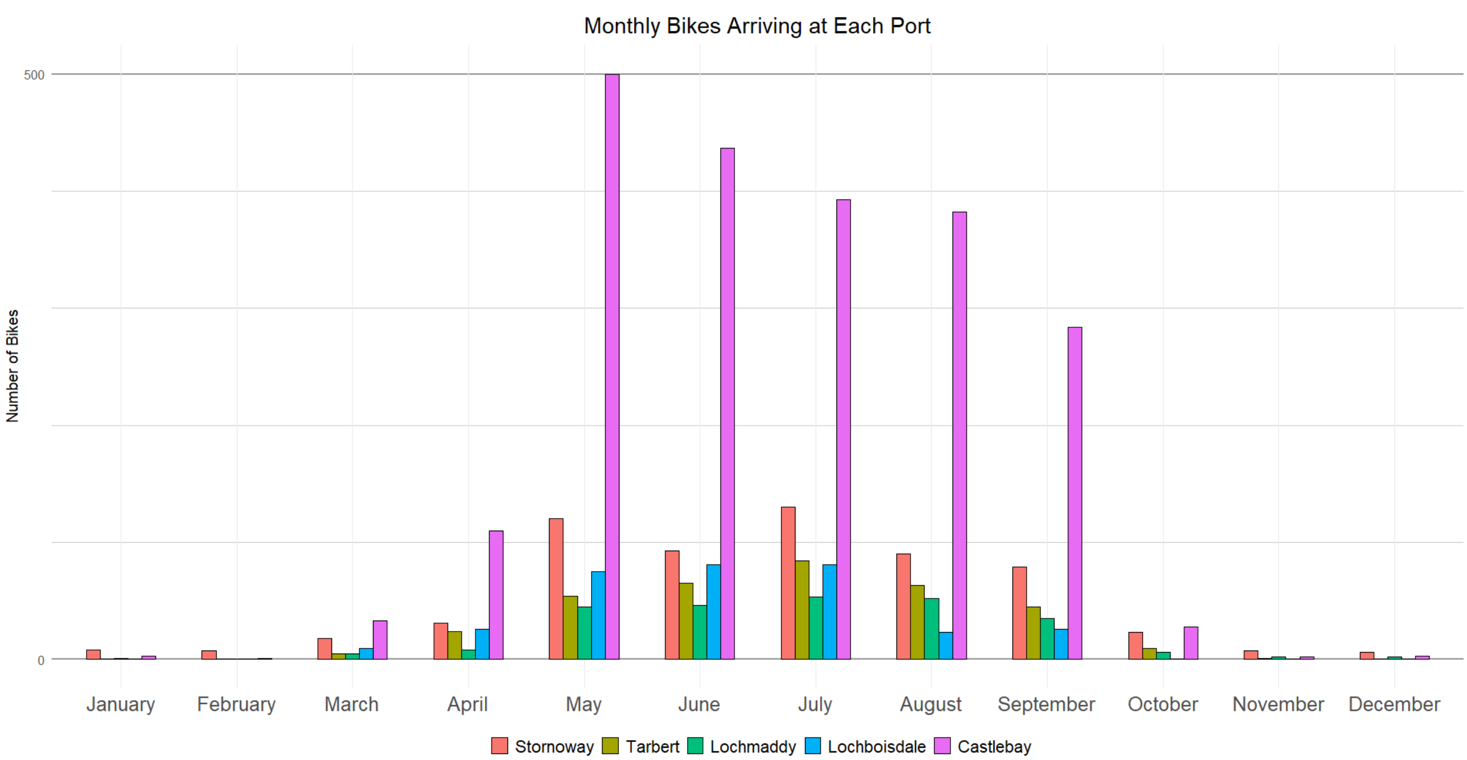
Monthly vehicles arriving at each port

CalMac also collects different types of vehicle data allowing us to look at those most likely associated with visitor traffic, namely, bicycles, motorhomes and caravans. These categories are particularly interesting to look at as they form patterns distinct from the overall passenger traffic above.

Booked bicycles:

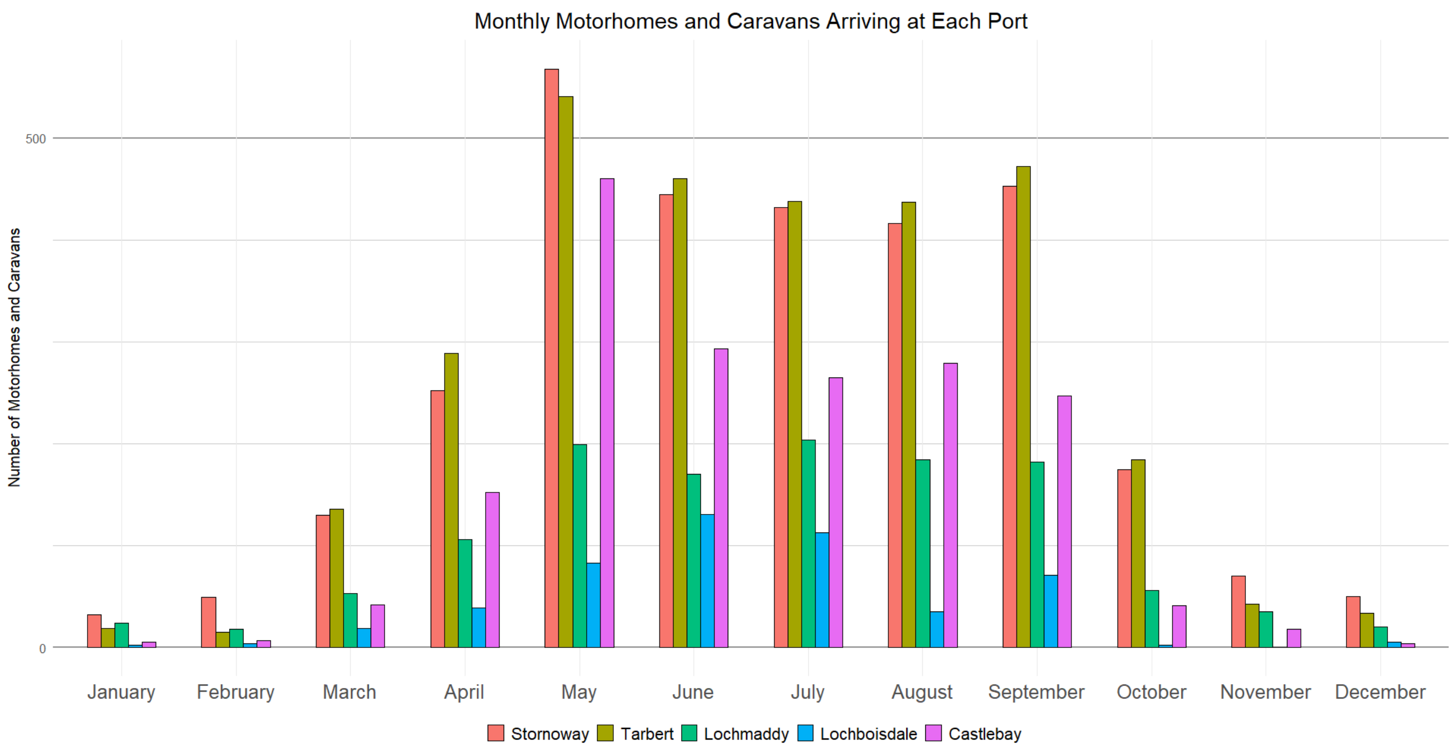
There is a distinct pattern of May being the peak cycling season with an emphasis on Castlebay (Barra) as the key arrival point with a steady main season decline until September before recording negligible amounts until the following April. This reflects the Hebridean Way cycle route heading south to north through the islands.
Bicycle numbers arriving in Castlebay peak in May at 500 reducing to just under 300 in September, while for the remaining ports they are in the 25-125 per month range, with Stornoway showing a slight variance.

To note: data below does not show **non-booked** bikes which are carried at the discretion of each vessel depending on space availability per sailing.



Motorhomes and Caravans:

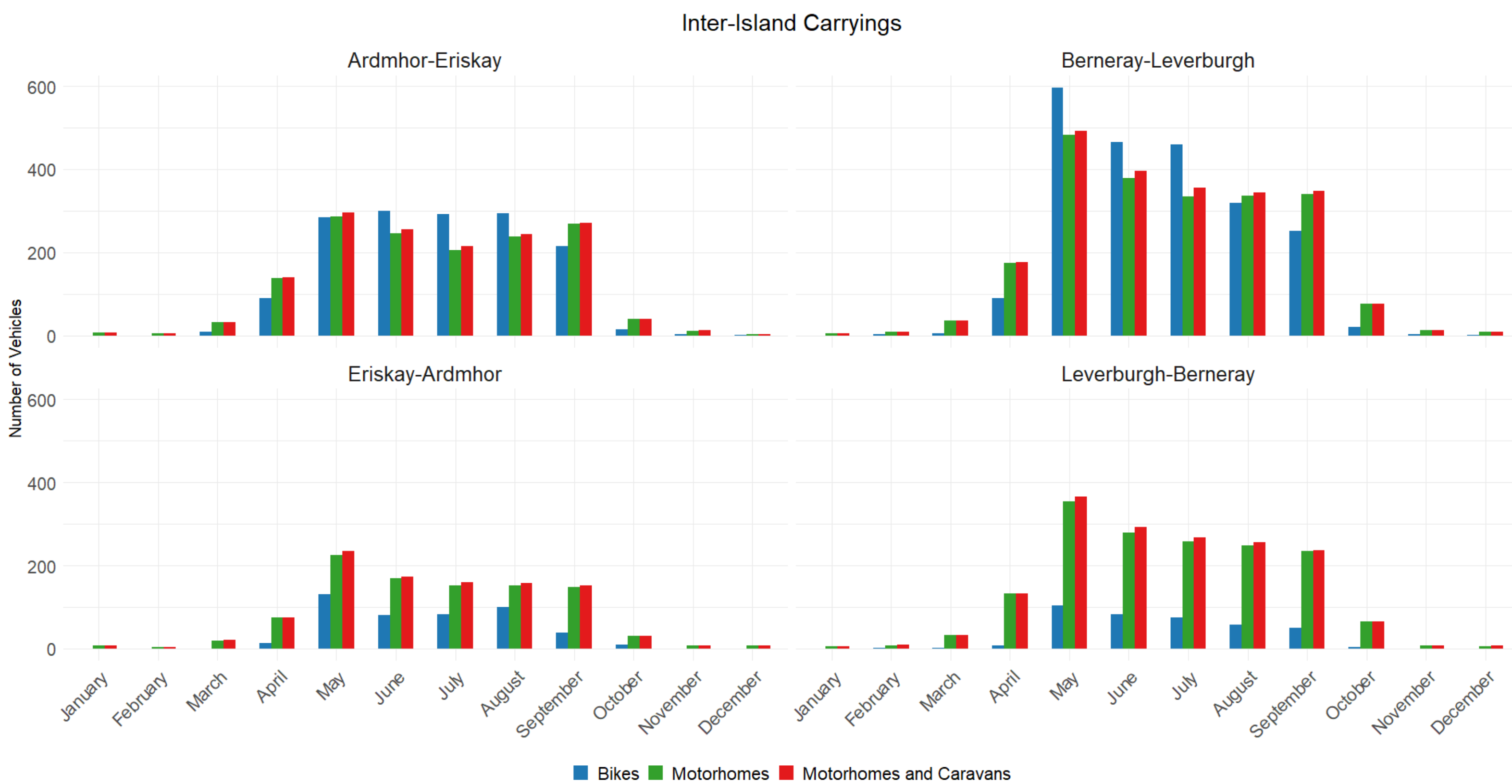
Similarly to bicycles, motorhomes and caravans have the same May to September peak activity period, including the significant start in April. Unlike bicycles, there is not one single preferred arrival point and the established trends of Stornoway (Lewis) and Tarbert (Harris) dominate in the 400-500 per month range, with Harris slightly busier for the most part. Castlebay (Barra) also remain important as a distinct third in popularity during the main season, followed by Lochmaddy then Lochboisdale.



Inter-island vehicle movement:

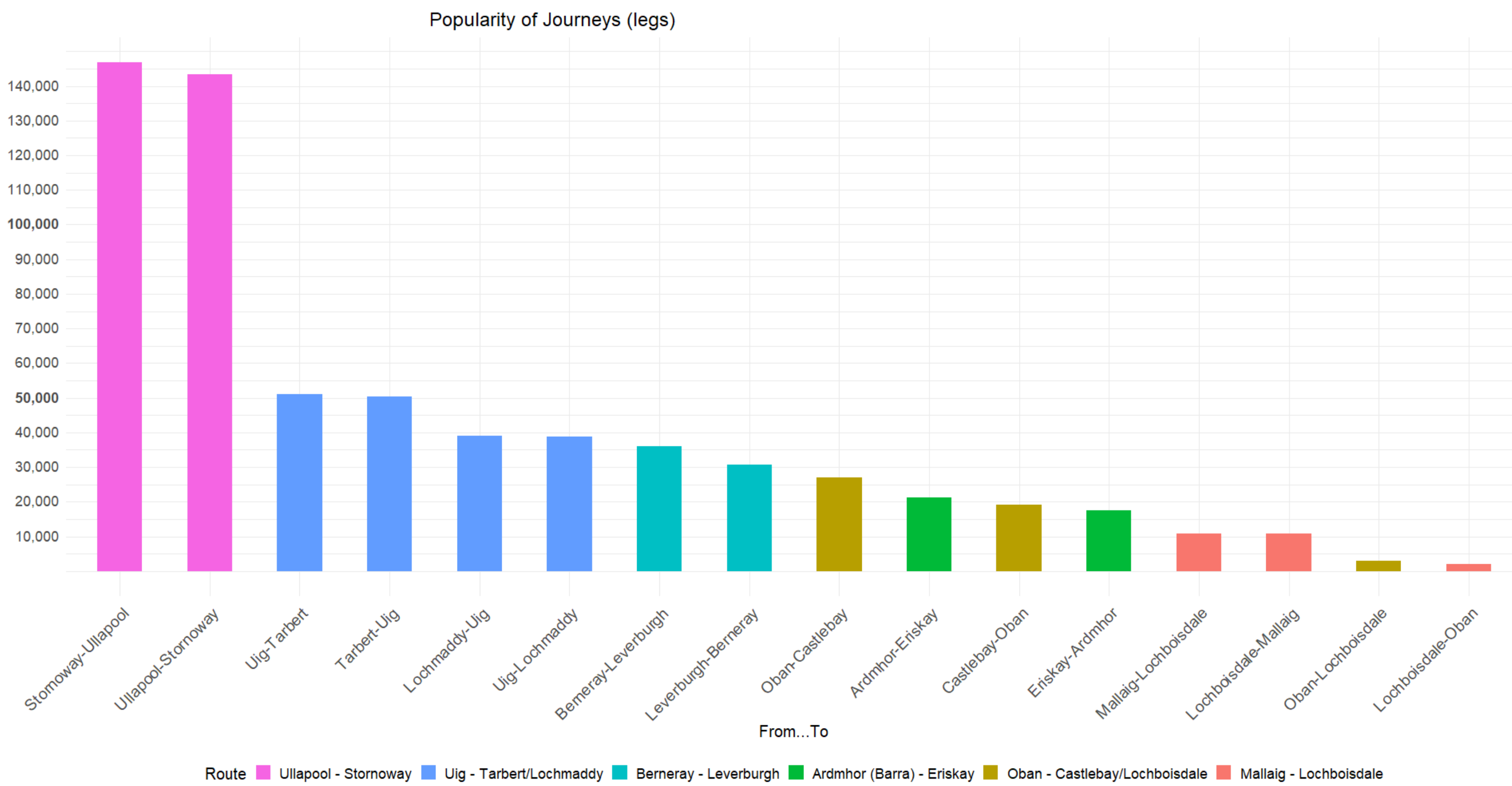
When data is looked at considering inter-island movement among bicycles and motorhomes we can see the clear trend of most traffic flowing in a south to north direction i.e. Ardmhor (Barra) to Eriskay (South Uist) then Berneray (North Uist) to Leverburgh (Harris). This is particularly pronounced in the bicycle data (blue) but is also there for motorhomes (green) and caravans (red). For example, Ardmhòr-Eriskay peaks close to 300 vehicles in the main season whereas Eriskay-Ardmhòr mostly peaks under 200.

We can also see that more visitor vehicles depart Berneray (North Uist) to travel north to Harris than depart Ardmhòr (Barra). This difference is up to just under double the carrying number.



Popularity of ferry journeys

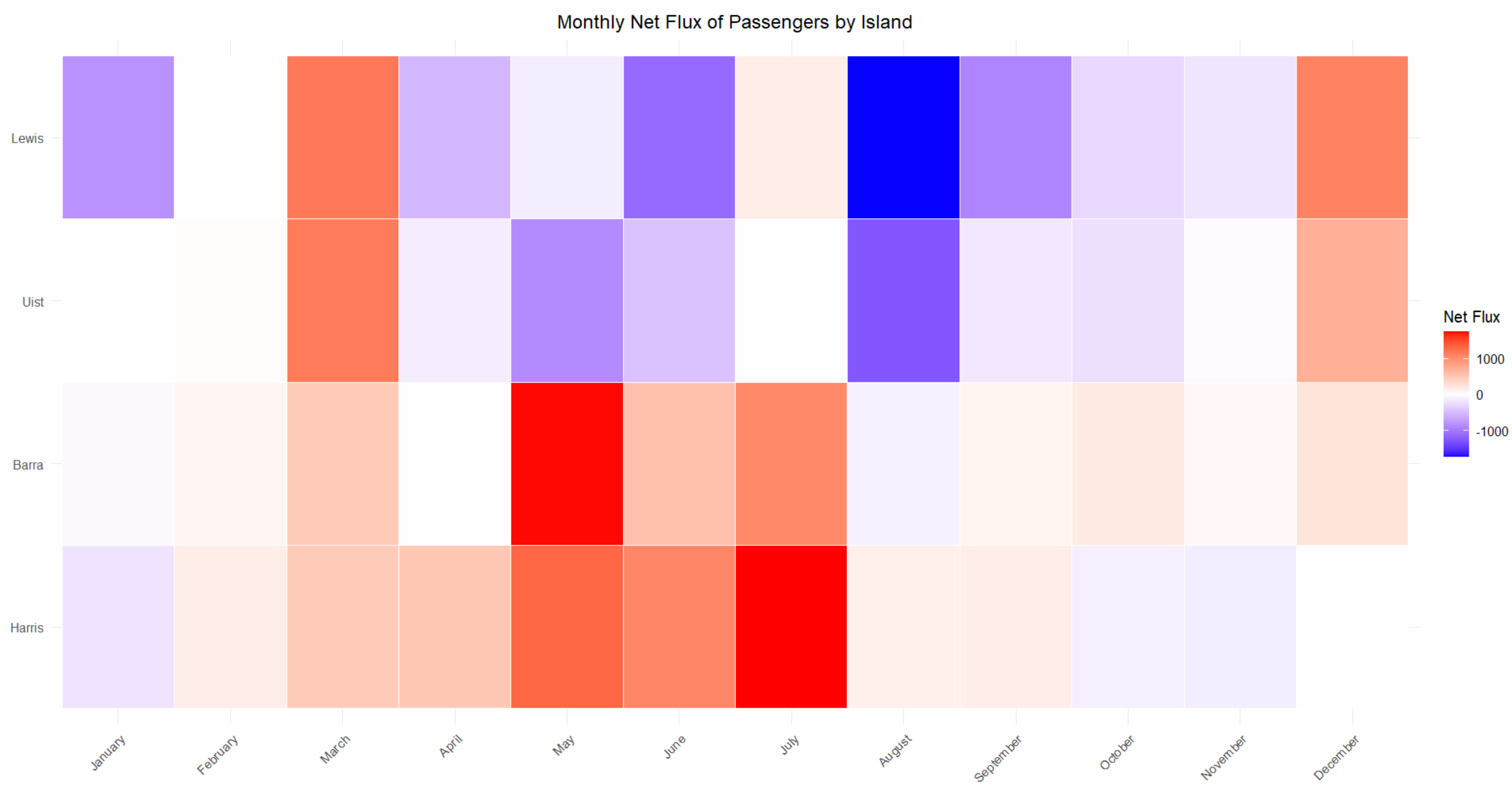
In terms of overall popularity of ferry journeys, the Stornoway/Ullapool route is significantly busier than all other Outer Hebrides routes (approx. 145,000 passengers carried on each leg in 2024)
The Tarbert /Uig route is next at an average 50,000 passengers per leg, then Lochmaddy/Uig at 39,000 average and closely followed by the inter-island Sound-of-Harris route Leverburgh/Bemeray at 32,500.
A final key leg of interest is Castlebay/Oban at an average leg of 23,000 passengers.
There is a general trend of arrival legs being slightly busier than departures legs except for Stornoway/Ullapool where the balance tips slightly the other way reflecting it being a key exit point.



Monthly net flux of passengers by island

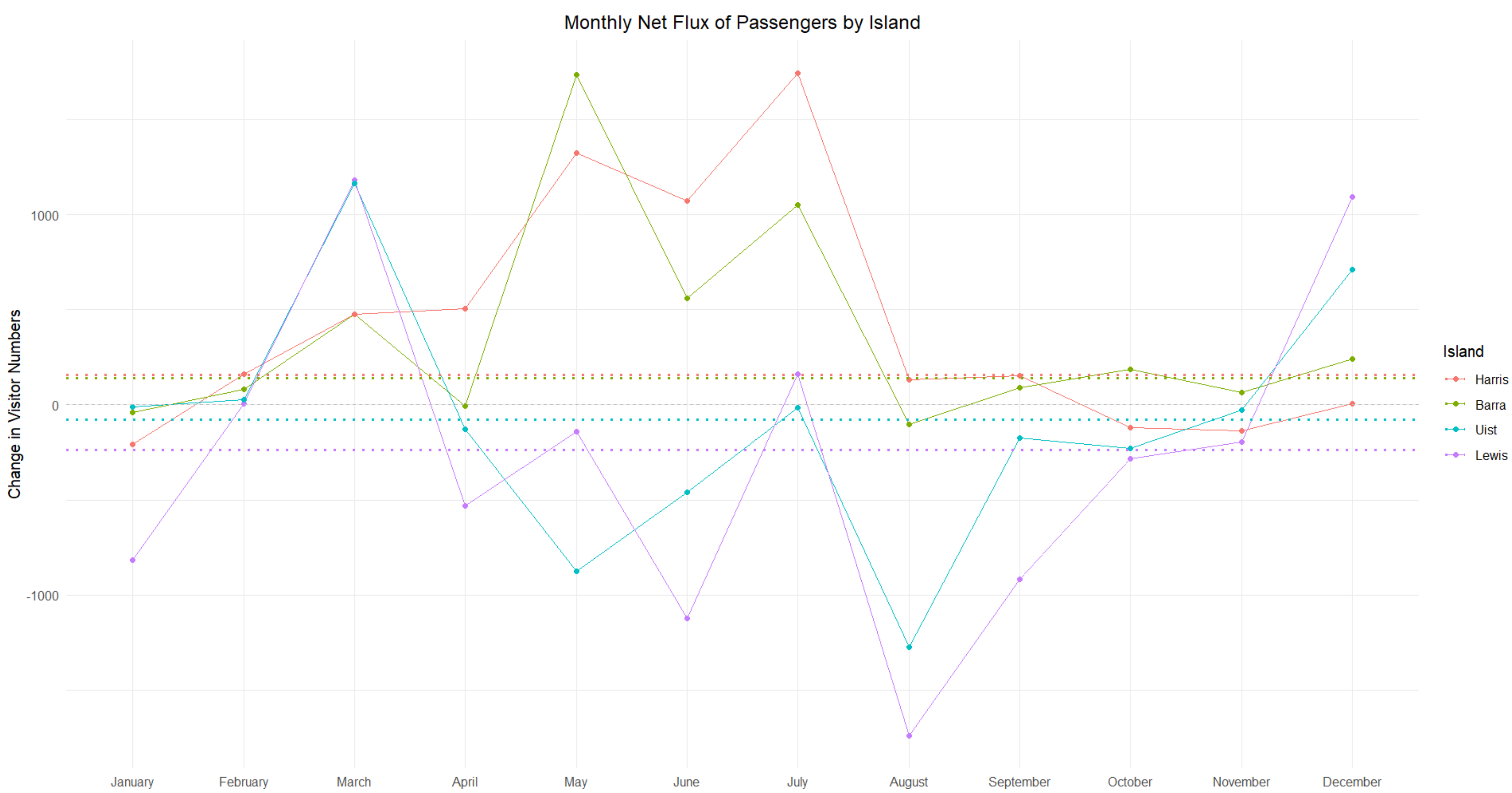
We define monthly net flux as the difference in passengers coming to and leaving an island or port.
In the below heatmaps, red represents a greater number of passengers who arrived than departed from an island in the given month.
Blue represents more departing than arriving and white means there is a balance of people arriving and departing.
It is important to note that white, which is represented as 0 net flux, does not mean there are no journeys recorded, just that the numbers arriving and departing are close to equal.

In the below heatmap, during the high season we can see a pattern of neutral to cooler colours in Lewis and Uist whereas Barra and Harris tend to range from neutral to warmer colours.
This implies more passengers/visitors are arriving via Barra and Harris locations and moving through the island and departing via Uist and Lewis. August is particularly insightful as you can see the trend of late high season with peak numbers departing via Lewis/Uist and arrival numbers becoming less warm in Barra/Harris.
May and July months reveal similar heatmap patterns across the island groups.



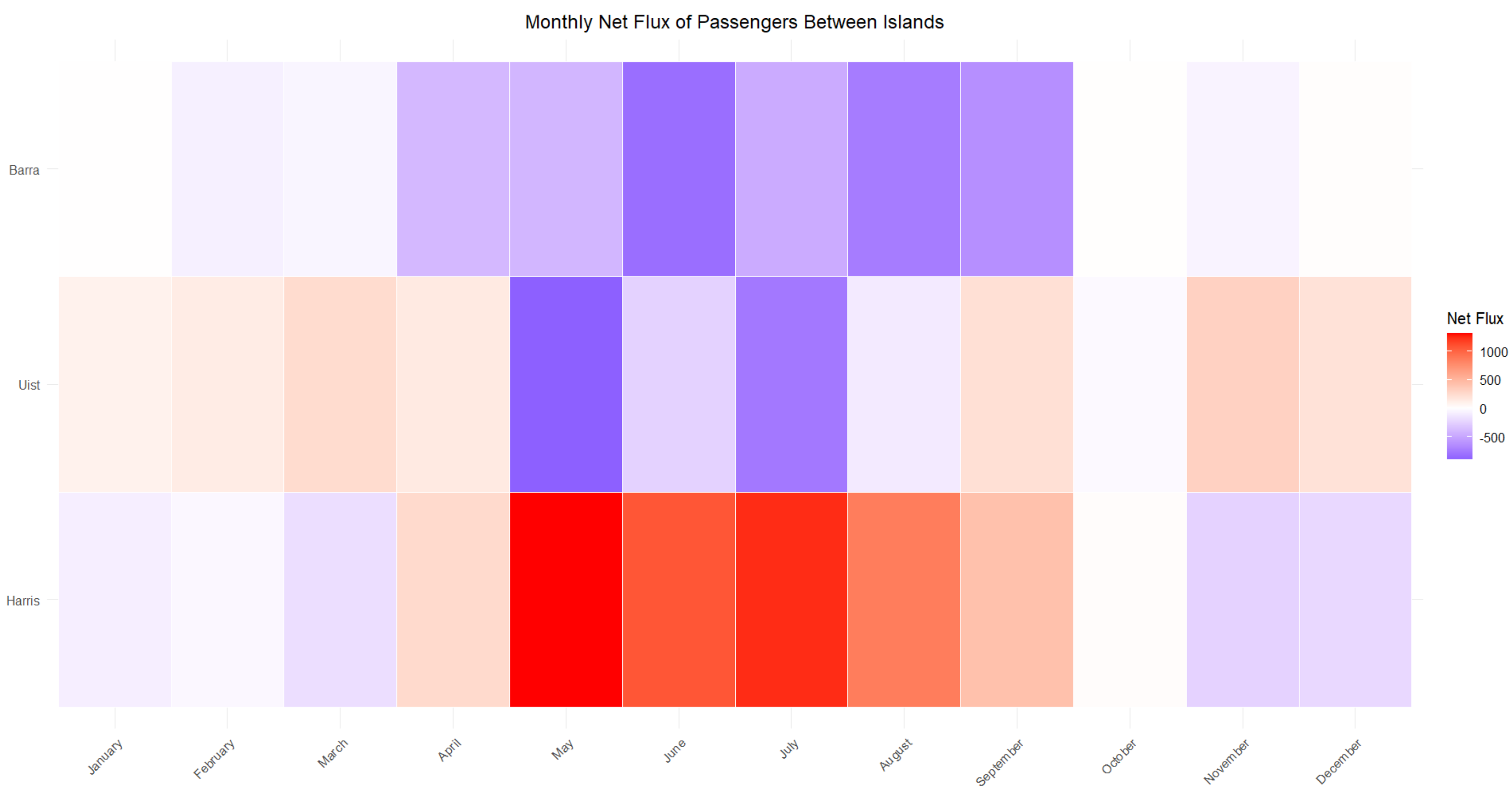
The below line graphs allow for clearer reading of the precise numbers involved in the monthly net flux.
In these graphs, the coloured lines represent specific islands, the vertical axis 0 represents neutral - the same number of arrivals as departures, above 0 represents more arrivals than departures and below more departures than arrivals.
The dotted horizontal lines represent the median average per island.

The pattern revealed in the heatmap of Barra and Harris experiencing more arrivals # while Lewis and Uist had more departures is further illustrated below with the green and red lines (Barra & Harris) in the net positive ranges and the purple and blue lines (Lewis & Uist) in the net negative ranges.



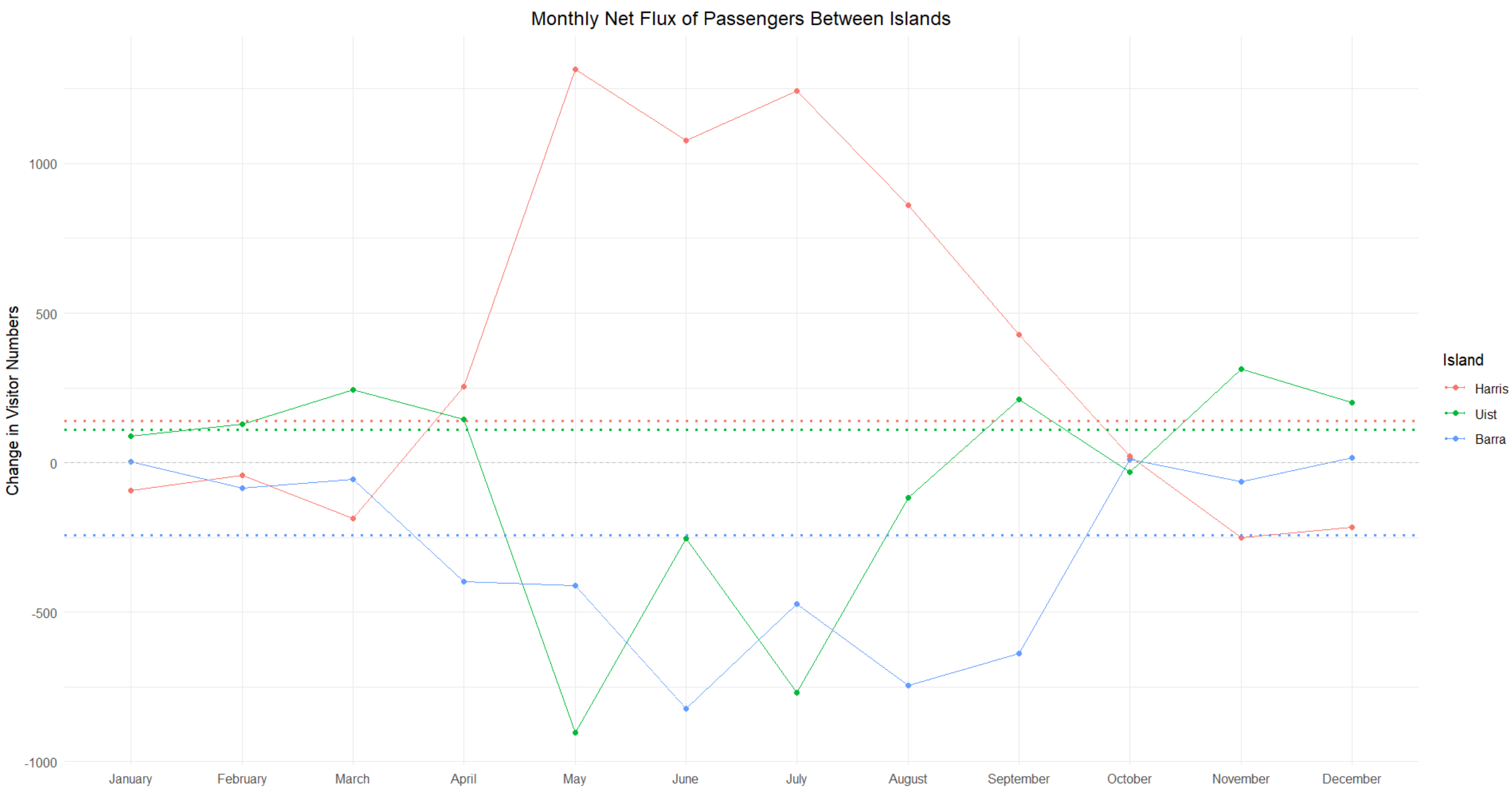
Monthly net flux of passengers between Outer Hebridean islands

This heatmap shows inter-island net passenger flux by month, further illustrating a sense of passengers travelling in a northerly trajectory through the Outer Hebridean islands. During the high season months, Barra and Uist experience a net negative flux via departures (cooler colours), while Harris experiences a net positive flux of arrivals on Harris (warmer arrivals). From the earlier heatmap we can see how these journeys then connect up with the net negative departures flux from Lewis as passengers leave the Outer Hebrides.



This plot excludes Lewis as the inter-island routes run Barra/Uist and Uist/Harris.

As before the line graph allows for a clearer reading of the precise numbers involved in the monthly net flux between Outer Hebridean island groups.

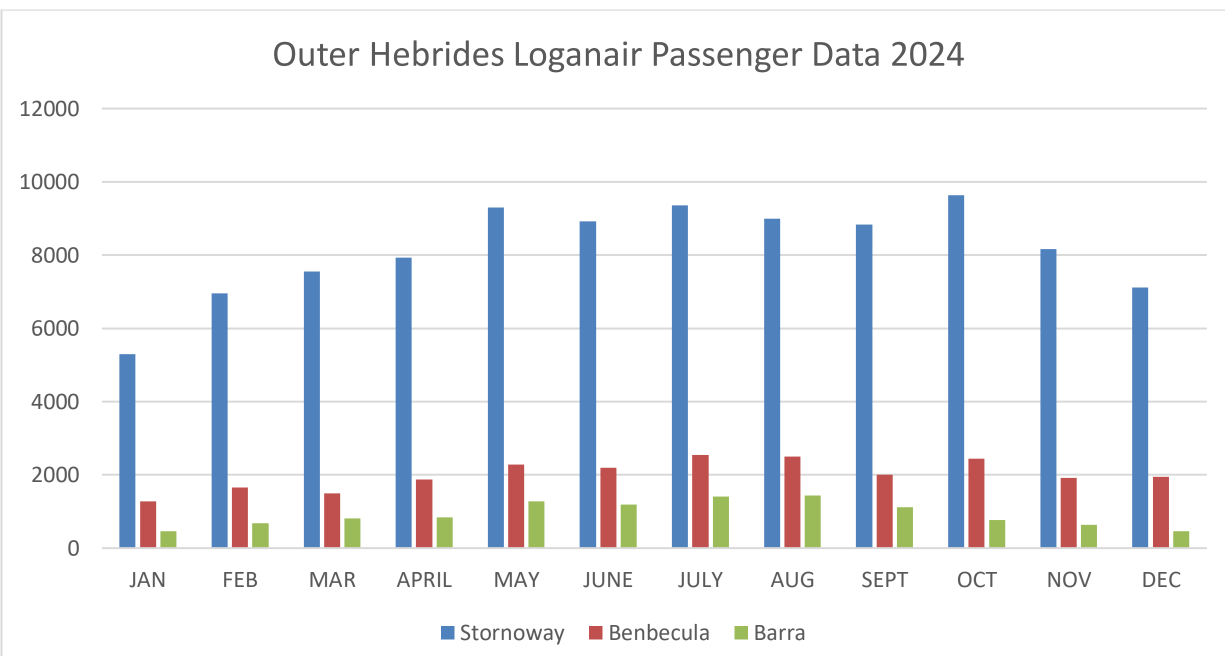


Insights from Loganair passenger flight data

This section highlights Loganair supplied passenger data for 2024, showing journey numbers on island air routes. Loganair indicated that due to the commercially sensitive nature of the data they were unable to supply more granular information which would allow disaggregation of local resident traffic.

The below graph show the numbers of passengers who travelled on Stornoway (Lewis & Harris), Benbecula (Uist) and Barra routes.
Whilst the available data does not allow for a direct extraction of visitor passenger numbers the trends adhere to the expected seasonal pattern, peaking during the summer months.

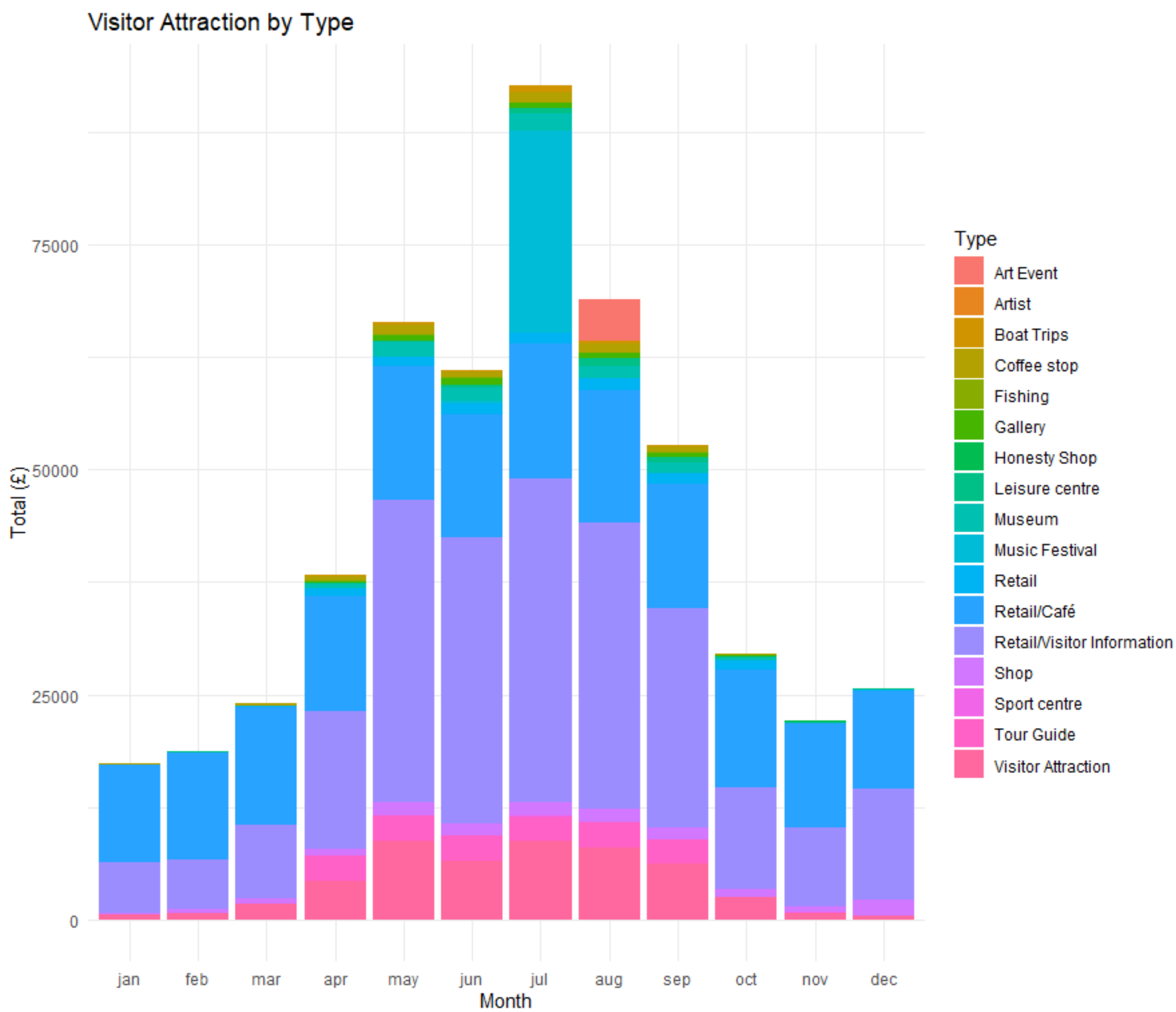
For all three island airports January is the lowest point of the year for traffic:
On Stornoway routes passenger numbers rose from a winter low of 5,300 in January to consistently over 8,000 from May to November,
For Uist there were just over 1,200 passengers in January – rising to over 2,000 for the months of May through to August.
In Barra the January low was 450 rising a notable 50% to almost 700 in February and then fairly consistently growing to a peak of 1,434 in August, before steadily declining to around 640 passengers in November and then a near 50% drop-off in December to just over 464.



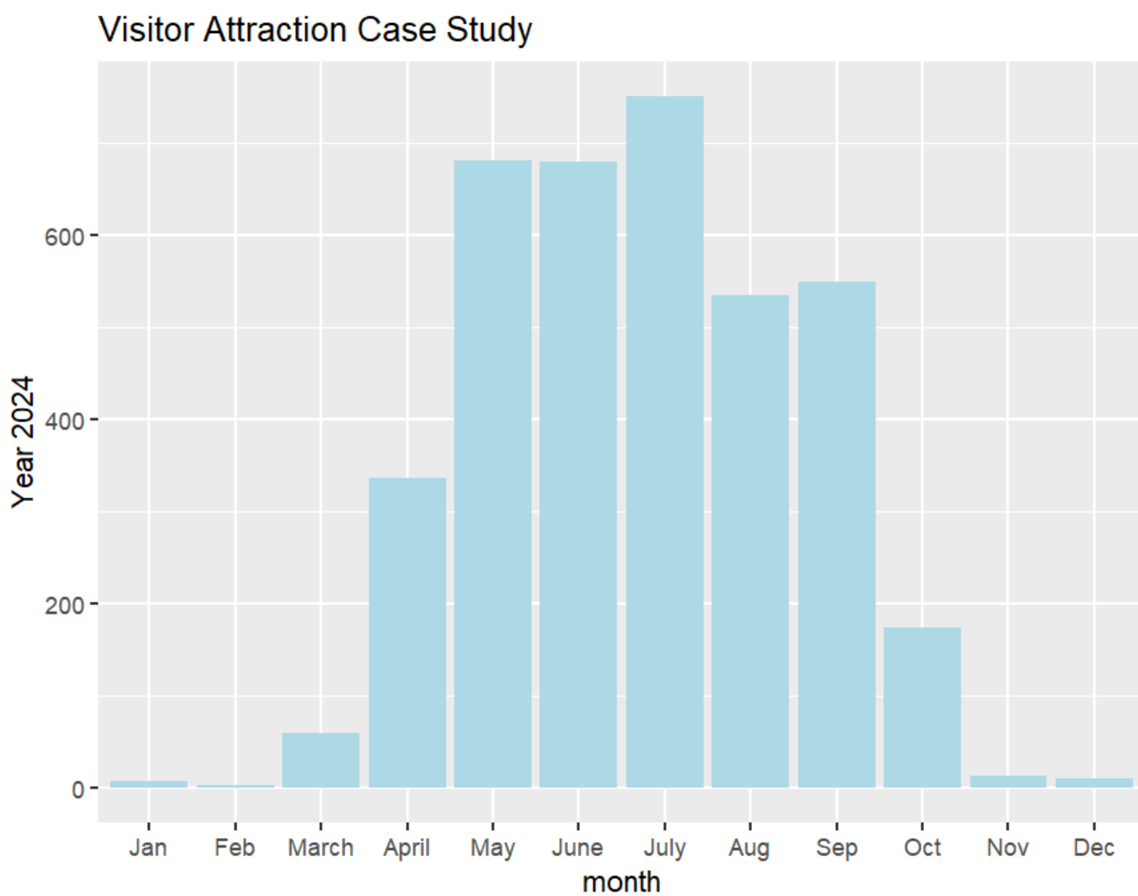
Visitor attractions insights

Insights from visitor attractions come from those attractions that chose to respond to the 2024 Visitor Activity survey circulated by VOH.

The below graph shows monthly visitor attraction revenue by type with retail shopping being key. The monthly results reflect the traditional visitor season trend with the average maximum revenue for the peak summer period coming in at over £60,000.



The below case-study shows a typical monthly breakdown of visitor numbers to a local attraction for 2024, showing the April starting effect for the main visitor season leading to a near doubling to around 700 visitors in the peak season period and declining through August and September, signalling an end of the main season, to just over 500 before a more significant downturn to less than 200 in October.



Conclusion

This report, compiled by Edinburgh Napier University and Visit Outer Hebrides, analysed visitor and other data for the Outer Hebrides, it provides insights into business types, locations, and accommodation budget perceptions across the island groupings.

It highlights a decrease in overall occupancy rates for 2024 compared to 2023. Harris consistently had the highest occupancy rates across all accommodation types, while Uist had the lowest. The most significant declines in occupancy rates were noted in self-catering accommodation and Harris hotels.

Occupancy trends for serviced and non-serviced accommodation across the island groupings were analysed. Lewis and Harris demonstrated higher occupancy rates, especially in serviced accommodation and during the winter months. While Uist and Barra saw a slight lead in overall occupancy for non-serviced accommodation.

A survey of 168 businesses across Lewis, Harris, Uist and Barra, revealed that non-serviced accommodation (72%) dominates the market, with a notable presence of serviced accommodation in Lewis and Barra. Most businesses consider themselves mid-range, with a slight shift towards luxury accommodation compared to the previous year.

While most businesses report 2024 to be the same or busier than 2023, a notable increase in businesses reporting a quieter year was observed.

Booking via a business's own website remains the most popular method, contradicting wider sector trends.

The monthly visitor spend for each Outer Hebrides island grouping is estimated including accommodation and additional visitor spend. Lewis demonstrated the highest additional visitor spend, peaking at over £13 million, while Barra had the lowest, peaking at just over £3.5 million. The combined monthly visitor spend for all island groupings peaks at just over £30 million in June and provides an estimated £81.5million to the local economy annually.

The analysis of CalMac ferry data reveals insights into passenger and vehicle movement in the Outer Hebrides. It highlights the popularity of different ferry routes, with Stornoway/Ullapool being the busiest. The data also shows a pattern of visitors travelling north through the islands, particularly when cycling, with Harris and Barra experiencing more arrivals and Lewis and Uist more departures when passenger flux was examined. The number of bicycles, motorhomes, and caravans follows a similar pattern, peaking in May.

Visitor attraction spend data, based on responses, showed retail shopping as a key expense.
Tourism is a significant contributor to the Outer Hebrides' economy (16%), with visitor spend increasing over the last few years. In Harris it accounts for 40.5% of the total economic activity. The sector is highly seasonal, with most visits and accommodation occupancy concentrated between April and October, but with a growing winter season emerging. Accommodation is dominated by small-scale providers, with 1,246 businesses offering around 7,900 bedspaces. Key transport access is limited to ferry and air routes, creating capacity constraints.

Recommendations

Occupancy insights from this report reveal there is capacity for further visitor growth on the islands, although this would need to be managed sustainably with additional sentiment analysis. Sentiment should be sought from the local tourism sector as well as wider Outer Hebrides communities when considering the appropriateness of future development proposals.

The use of additional data insights from transport information (ferries/planes) has revealed further confirmatory insights into visitor flow throughout the Outer Hebrides island groups which can be used for the basis of ideas for future development and enhancement of such flows.

That booking via a property's website remains the most popular method, contradicting wider sector trends of intermediary reliance is to be commended and useful to share these experiences with other destinations. Consideration should be given of the new challenges related to AI-assisted travel planning and how maintaining property website booking might be adapted for this new era rather than disrupted by should be considered.

This report has demonstrated the effectiveness of working with and gaining additional insights from a wider range of sources, some of which have been particularly rich and complete. Others demonstrate their potential but are partial or incomplete and would benefit from access to further detail – for example more granular statistics such as monthly rather than annually.

Working on this report has required a significant amount of time in cleaning-up the data but this process has resulted in established code for a lot of the current data reporting now which be re-used in future implementations. Local knowledge will still remain essential for final curation and fixing of any issues that may arise but these should be much reduced.

We propose the idea of a web application to implement future surveys. The application can check and give feedback to members completing the survey, to ensure that data is correctly formatted and relevant to each question. Ideally, each survey user can save and complete the survey at their leisure, with a dashboard to indicate how many responses are received, and to highlight late or missing responses. Ideally, pre-defined reports can be run as and when the data comes through as well as final reports.

Further, longer term ideas to consider is developing systems to automate data input at a industry level on a per day/week/month basis which would allow access to live/latest data on the central server at any time of the year. Working with a pilot selection of core VOH members with representation of different business types from across the sector would be an appropriate starting point.

Acknowledgments

Visit Outer Hebrides would like to thank all those who supported the delivery of this report: The team at Edinburgh Napier University, the Outer Hebrides Community Led Local Development LAG for their financial support, the Outer Hebrides Tourism Leadership Group partners for their input and guidance - especially Comhairle nan Eilean Siar for helping to access data and making valuable connections. All those who contributed data, particularly CalMac whose contribution was vital to our insights. Most importantly thank you to all of our members who take the time to complete our annual surveys and work so hard to create and sustain our local tourism industry.

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