

Western Isles Tourism Facts & Figures Update

Review of 2002 Season

Final Report for
Western Isles Enterprise & Western Isles Tourist Board

By

Macpherson Research

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1. INTRODUCTION & BACKGROUND

Macpherson Research was commissioned by Western Isles Enterprise (WIE) and The Western Isles Tourist Board to undertake an update study of the 1999 Western Isles Visitor Survey.

The 1999 Study

In 1999, the Western Isles Visitor Survey was commissioned by a number of organisations in the Western Isles who have either a responsibility for, or particular interest in the success and development of tourism throughout the Islands. These included:

Comhairle Nan Eilean Siar
Western Isles Enterprise
Western Isles Tourist Board

The main objectives of this study were to:

- 1) Furnish an estimate of volume and value of visitors
- 2) Supply information about visitors and their visits in order to guide future tourism policy
- 3) Provide baseline information which can be updated in future studies

The study was completed by Macpherson Research in 2000, and provided a comprehensive picture of the volume and value of tourism in the Western Isles and was accepted as a source of varied statistical information.

2002 Update

In order to maintain up-to-date information on some key aspects of tourism in the Western Isles, Western Isles Enterprise and Western Isles Tourist Board commissioned a desktop based study which would review data relevant to the 2002 season, making comparison to the 1999/2000 research, and, where appropriate offer predictions for 2003.

In particular, fresh information was required on the following aspects:

- 1) Review of 2002 Transport Capacities: By island, by month for Flights and Ferries
- 2) Assessment of 2003 Available Transport Capacities
- 3) Estimate of Accommodation Capacity: WITB registered and non-registered
- 4) Review of 2002 Occupancy levels

The current report is primarily based on secondary sources of information and not primary fieldwork. Consequently the volume and value estimates for the tourism industry are not subject to such a high level of statistical confidence as the 1999 figures. We do believe, however, that the data in this report represents a realistic and useful update and monitor of the tourism sector in the Western Isles.

2. EXECUTIVE SUMMARY

KEY STATISTICS

VOLUME AND VALUE OF TOURISM ESTIMATES 2002 (INCL. YACHTS)

		<u>% GROWTH SINCE 1999</u>
TOTAL VOLUME OF VISITORS (FULL YEAR, INCLUDING YACHTS)	179,700	8.8%
TOTAL VOLUME OF VISITORS (MARCH – OCTOBER SEASON INCL. YACHTS)	157,000	8.7%
TOTAL VISITOR EXPENDITURE (FULL YEAR - EXCLUDING TRAVEL TO /FROM ISLANDS)	£39.3 m	19.7%

WESTERN ISLES TRANSPORT ARRIVALS 2002 (EXCL. YACHTS)

	<u>March - October</u>	<u>Full Year</u>
Total Passengers (actual)	194,567	240,607
Total Visitors (estimate)	151,590	174,197
Total Holiday & VFR Visitors (est)	119,171	126,132
Cars	40,018	48,754
Coaches	496	538

GROWTH IN VISITORS TO THE W. ISLES 1999 – 2002 (EXCL. YACHTS)

<u>Year</u>	<u>Volume Mar - Oct</u>	<u>Year on Year Growth</u>
1999	139,476	N/A
2000	143,337	2.8%
2001	147,580	3.0%
2002	151,590	2.7%

ACCOMMODATION BED OCCUPANCY APRIL – OCTOBER 2002

Accommodation type	Bed Occupancy %	Room / Unit Occupancy %
Hotel	43	59
Guest House	60	73
Bed & Breakfast	24	33
Self Catering	Na	62
Caravan	Na	53

ACCOMMODATION CAPACITY

Island	Rooms	Beds
Lewis	603	1,204
Harris	276	669
North Uist	136	309
Benbecula	99	190
South Uist	165	377
Barra	132	288
Western Isles	1,411	3,037

KEY POINTS

VOLUME AND VALUE

- The volume of tourism in the Western Isles (measured by the number of visitors in 2002) has grown by 8.8% since 1999 to 179,700 visitors. Over the same period the average expenditure per visitor has grown by 9.8% resulting in an overall increase in the total value of tourism in the Islands of 19.7% to £39.3 million.
- The main season appears to have genuinely extended into the months of March and October. This is reflected in higher transport volumes into the Western Isles during these months. There is now a small but real year round holiday industry in the Western Isles. Business visitor volumes vary little with the season and provide a small but steady trade year round.
- There is a strong summer peak with July and August accounting for 38% of the total arrivals from the mainland during the main March – October 2002 season. The height of the summer peak actually spans only 3 or 4 weeks in the second half of July and early August.
- Stornoway is the most popular point of entry into the Western Isles. In July 47% of all arrivals were into Stornoway and in August the proportion was 50%.
- 65,862 passengers travelled between the Islands from March – October 2002. This is a figure that is likely to increase, as more and more visitors seem to prefer to ‘island-hop’ rather than staying in one place.
- Out of the 194,567 passenger arrivals into the Western Isles in March – October 2002 (excluding yachts), an estimated 151,590 were visitors. Out of this figure, an estimated 119,171 were either on holiday or visiting friends and relatives (9.1% growth since 1999), and 32,419 were on business.

TRANSPORT

- Despite this growth, there does appear to be sufficient provision of transport to satisfy the increasing demand. The only possible constraint that could be clearly identified through interpretation of passenger carrying data from 2002 existed on flights from Edinburgh to Stornoway. This capacity constraint was recognised by British Airways who added additional flights, and by British Midland International who introduced a new seven day service.
- It is likely that constraint may exist on certain flights and ferry crossings during the summer peak weeks, although they are not easily identifiable. However, constraints on specific days are offset by lower capacity utilisation on others, providing a less notable average figure. A detailed, daily investigation of flight and ferry services would be required to accurately substantiate this hypothesis. On the basis of the

available data and discussions with the transport providers, it is probable that there were only a handful of occasions when ferries were completely full.

- It is extremely difficult to measure the excess/unsatisfied demand for flights or ferry crossings. Unsatisfied demand exists wherever potential passengers did not come to the Western Isles because their choice of crossing and/or flight was fully booked. Thus, there is no way of knowing how many people did not come to the Western Isles as a result of not being able to travel when they wanted to.
- The maximum number of people that can be transported into the Western Isles by air and sea in 2003 is a massive 1,292,361 (compared to actual total arrivals of 240,607 in 2002). This is a theoretical total and is misleading because of the difficulty in assessing the passenger capacity of ferry crossings. Each boat has a maximum number of passengers that it is licensed to carry. However, this capacity could only be reached if there was an unusually large number of foot passengers. Thus, it is more realistic to measure the capacity according to the loading deck. This method of calculation provides us with a total passenger capacity of 917,301. This still leaves capacity for an additional 676,694 passengers over the 2002 arrivals.

ACCOMMODATION

1 Consultant's Comments

- The greatest constraint in the accommodation sector is for Self Catering. In July and August average occupancy exceeded 90% for 2 months.
- Guest Houses had the highest levels of occupancy compared to other serviced accommodation providers with over 80% room occupancy for June, July and August. Guest Houses have experienced an ongoing trend towards increased occupancy and on peak days during the peak weeks there are occasions where capacity is inadequate. (Weekly occupancy data is provided in appendix 3).
- Bed and Breakfast accommodation had the lowest monthly average levels of occupancy, neither room nor bed occupancy rose above 50% in any month of the year.
- As with transport, the data suggests there is spare accommodation capacity at present, given the number of visitors who actually visited in 2002. However there is an apparent contradiction between what the figures suggest and what the providers and TIC staff comment. It would seem that monthly, and even weekly occupancy figures hide pockets of real constraint. This occurs for two main reasons: firstly, accommodation tends to be booked according to the schedule of flights and ferries allowing access to and from the island. This results in a bottleneck on certain days of the week and a contrasting lull on others. Thus the weekly average suggests that there is spare capacity, when the reality is that on certain nights occupancy approaches 100%. Secondly, occupancy levels are significantly lower in the hinterland than at points of entry and exit from the island. This again causes the average occupancy figures to be dampened.

- There is another factor which explains the difference between the measured occupancy levels and the perceived capacity constraints. It would appear that the perception of high occupancy and lack of free space becomes noticeable and subsequently acute at occupancy levels significantly below 100%. A visitor having to try 4 B&Bs before finding a bed in the fifth gets the impression that there is almost no space available that evening. In reality room occupancy is 80% and bed occupancy could be as low as 40%. It may vary between different types of accommodation but it would seem that a monthly average occupancy of 75% or more results in occasions where there is real difficulty in locating a bed.
- Accommodation provision is not as responsive to increasing demand as transport capacity. Consequently there is a longer time lag between unsatisfied demand and the supply of additional space. Providers are reluctant to invest in new capacity until there is strong evidence of demand. In addition, the excess demand may only occur for a very short peak of the peak season and is not therefore commercially viable to satisfy.
- Overall, there is some evidence of an accommodation supply constraint on the current level of tourism on a few peak days of the summer season. There are very few reports of visitors being completely unable to find accommodation. However, we believe that there is a greater constraint on growth which is manifest in the unknown number of visitors who choose not to visit the Western Isles because they could not book the kind of accommodation they wanted. This is particularly evident in the Self Catering market where providers report they turn away as many people as they accept. Many providers had already filled their summer season before this report was prepared in December and January.
- The greatest accommodation need is for more self catering accommodation. Thereafter, there would seem to be some demand for more economy hotel type accommodation (e.g. Holiday Inn, Travelodge type) aimed at family groups who want to travel throughout the Western Isles, staying in a number of locations instead of basing themselves at one destination.
- It was not possible to make any realistic analysis of the accommodation or transport capacity constraints in particular islands or for particular grades of accommodation. The sample sizes are inadequate and the inherent variability is so great that it becomes a meaningless and misleading analysis. It is more likely that the constraints are felt in small pockets associated with ferry ports and on certain occasions associated with sailings and peak days at the height of the season.

2 Key Points from Providers and TIC Staff

- Occupancy levels in 2002 were similar to that of 2001, if not better. None of the providers claimed to have experienced a decline in demand.
- Demand for accommodation is concentrated during weekdays, dropping sharply at the weekend.
- Average length of stay in each island has decreased. Visitors more inclined to 'island-hop'.
- Overall, accommodation is sufficient to meet demand. If it is spread thinner it may become economically unsustainable.

- There is a particular shortage of Self Catering units and some respondents also reported a lack of Bed & Breakfasts throughout the Western Isles.
- There is a large excess of demand for S/C units – 100+% during the busy months.
- Demand for accommodation is closely linked to the timetable of ferry crossings.
- Advanced bookings are increasing. Visitors recognise demand for accommodation.
- Visitors are placing greater emphasis on value and quality but not everyone is prepared to pay more.
- There was an increase in the number of Scottish visitors, and a decrease in American visitors.
- Some accommodation providers chose not to register with the WITB due to their dissatisfaction with the inspection process.

3. VOLUME AND VALUE OF TOURISM 2002

3.1 Total Volume and Value of Tourism 2002

The Western Isles Visitor Survey 1999 conducted calibration surveys at each of the 8 exit points from the Western Isles. This provided an estimate of the split between visitors to the islands and residents who are travelling off the islands. Similarly, it enabled an estimate of the relative proportions of holiday versus business visitors. For the current updated report, these calibrations were applied to HIAL and CalMac transport figures from the mainland to the Western Isles for 2002. This enables a realistic and reasonable estimate to be made of the number of holiday and business visitors that arrived into the Western Isles in 2002.

The Western Isles Visitor Survey 1999 also asked each visitor in the sample how much money they had spent on their trip. This enabled an estimate of the average expenditure per person per trip. The yearly TIC Visitor Survey, conducted annually by Macpherson Research, includes an estimate of the average expenditure per day per person. Between 1999 and 2002 this figure had grown by 9.8%. This rate of growth was applied to the total spend per trip from the 1999 Visitor Survey to estimate the average spend for holiday and business visitors in 2002.

The average spend multiplied by the number of visitors provides an estimate of the total spend by visitors in 2002. The calendar year has been split into the main visitor season of March – October, and the off peak season (January, February, November and December)

In 1999 a survey of yacht borne visitors was also undertaken which demonstrated that around 5,500 visitors arrive by yacht and spent in the region of £400,000 in the Western Isles. No such survey was conducted for this update but it has been assumed that a similar volume of yacht borne visitors visited in 2002 and their average expenditure rose at the same rate as other holiday visitors.

Table 3.1 March – October 2002 Value of Tourism

Segment	No. Visitors	Average Spend £	Total Spend £	% Total
Holiday & VFR	119,171	221.80	26,432,128	77.2
Business	32,419	227.30	7,368,839	21.5
Yacht visitors	5,500	80.15	440,825	1.3
Total	157,090		34,241,792	100.0

Table 3.2 January - February & November – December 2002 Value of Tourism

Segment	No. Visitors	Average Spend	Total Spend	% Total
		£	£	
Holiday & VFR	6,960	221.80	1,543,728	30.3
Business	15,646	227.30	3,556,336	69.7
Yacht visitors	0	0.00	0	0.0
Total	22,606		5,100,064	100

Table 3.3 TOTAL Volume and Value of Tourism 2002 (Full Year)

Segment	No. of Visitors	Average Spend	Total Spend	% Total
		£	£	
Holiday & VFR	126,131	221.80	27,975,856	71.1
Business	48,065	227.30	10,925,175	27.8
Yacht visitors	5,500	80.15	440,825	1.1
Total	179,696		39,341,856	100

Table 3.4 Growth in The Value & Volume of Tourism 1999-2002

	1999	2002	Actual Increase	% Increase
Total Value of Tourism	£32.9 m	£ 39.3 m	£ 6.468 m	19.7
Total Volume of Tourism	165,088	179,696	14,608	8.8

- We estimate the total value of tourism in the Western Isles has increased by just under £6.5m from £32.9 in 1999 to £39.3million in 2002. This represents an increase of 19.7%.
- We estimate the total volume of tourism in the Western Isles has increased by around 14,600 visitors from 165,100 in 1999 to 179,700 in 2002. This represents an increase of 8.8%.

4. TRANSPORT CARRYING VOLUMES 2002

The following section presents the volume of transport into the Western Isles in 2002. The data is separated and reported as follows:

1. Total Transport Carryings

These figures present the volumes of passengers, cars and coaches that arrived into the Western Isles from both the mainland and other islands in the Isles.

2. Mainland – Western Isles Carryings

These figures present the volumes of passengers, cars and coaches that arrived from the mainland into the Western Isles in 2002.

3. Island – Island Carryings

These figures present the volumes of passengers, cars and coaches that travelled between the islands that constitute the Western Isles.

4. Visitor Arrivals

These figures present the volume of holiday and business visitors that arrived from the mainland into the Western Isles, and are the most useful indicator of the level of tourism in the Western Isles for 2002.

4.1 Provision of Transport to The Western Isles

As an archipelago, it is possible to accurately measure the total volume of transport in and out of the Western Isles during both the season (March – October) and the complete calendar year. It is also possible to demonstrate the popularity of the different points of entry, which may enable decisions on how best these points of access can be developed to facilitate the increasing number of visitors.

There are two modes of transport into the islands: Flight + Ferry.

Table 4.1 Provision of Transport for the Western Isles

<u>Flight Routes</u>			<u>Ferry Routes</u>		
		<u>Airline</u>			<u>Ferry</u>
<u>Stornoway</u>	Inverness	BA + HA	<u>Stornoway</u>	Ullapool	C
	Edinburgh	BA + BMI			A
	Glasgow	BA	<u>Tarbert</u>	Uig	L
	Benbecula	BA			M
<u>Benbecula</u>	Stornoway	BA	<u>Lochmaddy</u>	Uig	A
					C
	Glasgow	BA	<u>Lochboisdale</u>	Castlebay/ Oban	C
	Barra	BA			A
<u>Barra</u>	Benbecula	BA	<u>Castlebay</u>	Oban	L
					M
	Glasgow	BA	<u>Leverburgh</u>	Berneray	A
					C
			<u>Barra</u>	Eriskay	*

* Council run through 2002. Caledonian MacBrayne taking over service as of 04/04/2003

4.2 Transport Data Collection

- Highlands and Islands Airport Limited provided actual passenger arrival and departure figures for 2002, separated by month, by airport. These figures are recorded for every flight that arrives or departs through the HIAL airports and therefore includes accurate figures for each of the relevant airlines.
- Caledonian Macbrayne provided actual passenger, car and coach landing figures for 2002. However the figures were only available in six monthly aggregate totals (Jan-June & July-Dec). Using actual passenger landing figures recorded by port and by month for the previous three calendar years (supplied by WITB & Caledonian MacBrayne) it was possible to separate the figures for 2002 supplied by Caledonian Macbrayne into reasonable estimates for monthly landings at each port. On this basis the total volume of transport into and between the Western Isles by month, by island for the season March to October was calculated.

4.3 Total Western Isles Passenger Transport Volume 2002

Table 2 represents the total volume of passengers arriving into airports and ferry terminals in Lewis, Harris, the Uists and Barra during March – October 2002. The figures include both travel into the Western Isles from the mainland and travel between the Islands.

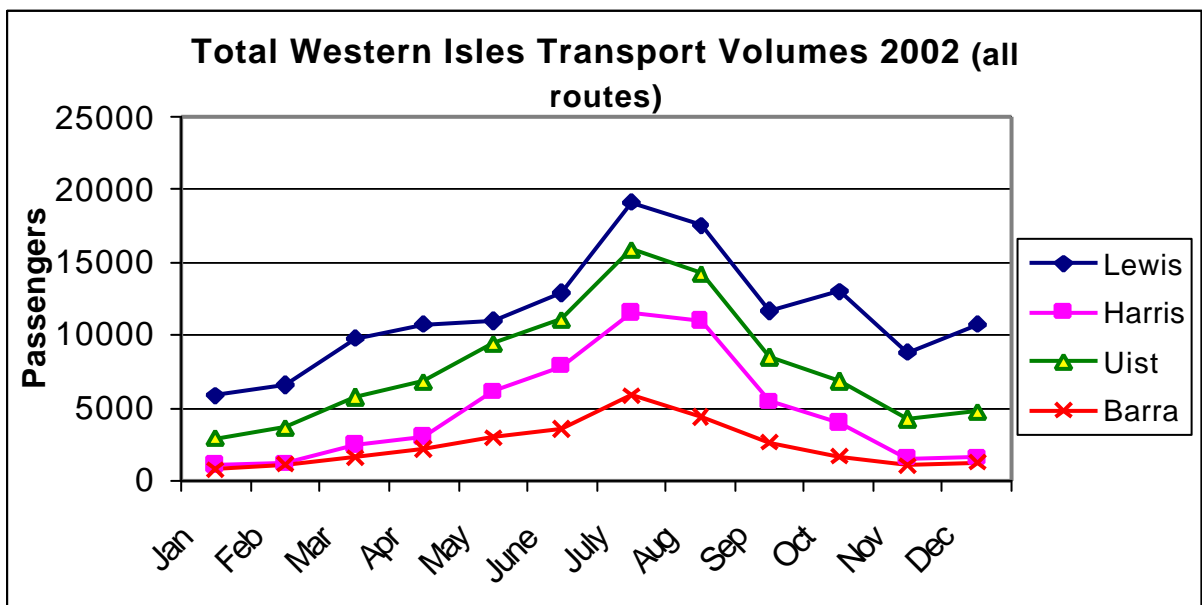
Table 4.2 Total Volume of Passengers Arriving by Air and Sea

Island	Mar	Apr	May	June	July	Aug	Sep	Oct	Season
Lewis	9782	10777	10991	12883	19161	17523	11668	13017	105,802
Harris	2448	3007	6094	7867	11559	10981	5455	3944	51,356
Uist	5724	6787	9410	11077	15900	14212	8483	6865	78,458
Barra	1578	2205	2940	3559	5841	4374	2619	1697	24,814
Total	19,532	22,775	29,435	35,387	52,462	47,090	28,226	25,523	260,429

Source: HIAL and Caledonian MacBrayne carrying data and Macpherson Research monthly estimates

- During the main season (Mar-Oct) 260,429 passengers travelled into and between the Western Isles. This total volume includes both visitors and residents.
- Throughout the islands July and August constitute the busiest months, accounting for 38% and 31% of the peak season and the year's total respectively.
- This summer concentration of passenger carryings is reflective of a wider trend that demonstrates the substantial difference between the high and low seasons. Figure 4.1 illustrates the consistency of this trend throughout the islands.
- After July there is a steady decline in the volume of passengers, although this pattern is reversed in both October and December, particularly with regard to Lewis. This upturn could be attributed to the October school holidays and the Christmas period. The same anomaly is evident in April, when there is a short acceleration of growth.

Figure 4.1



4.4 Mainland to Western Isles Passenger Transport Volume 2002

Table 4.3 represents the total volume of passengers arriving into the Western Isles from the mainland from March – October 2002.

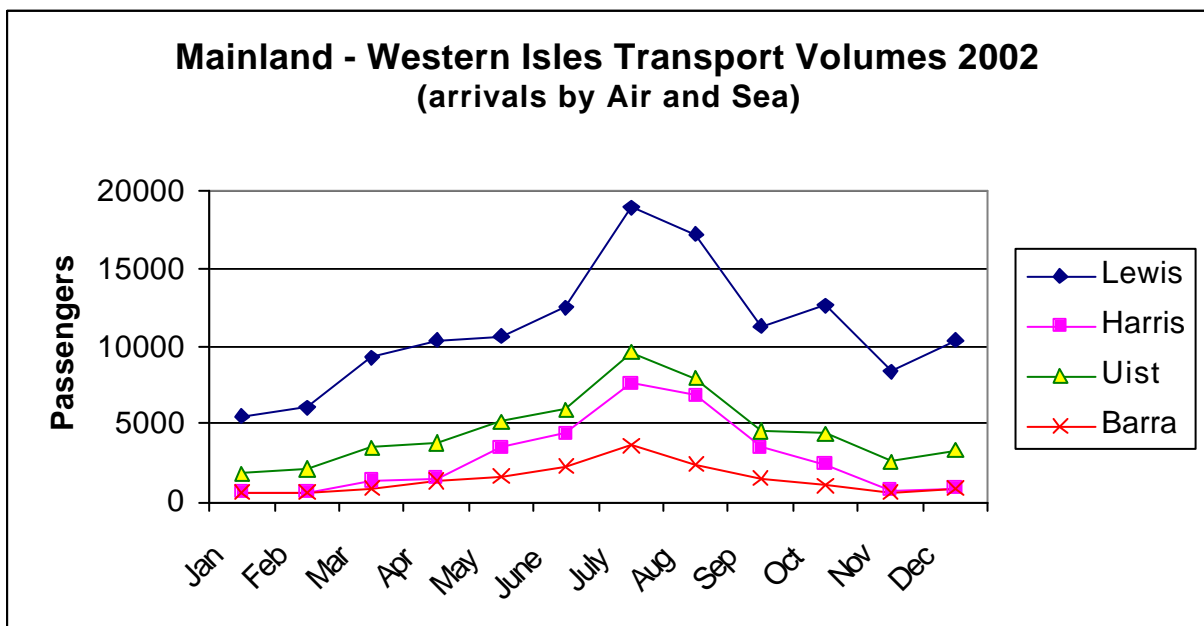
Table 4.3 Number of Passengers Arriving from the Mainland by Air and Sea

Island	Mar	Apr	May	June	July	Aug	Sep	Oct	Season
Lewis	9343	10403	10700	12587	18878	17229	11317	12679	103,136
Harris	1423	1462	3444	4455	7643	6865	3479	2517	31,288
Uist	3517	3857	5222	5973	9593	7939	4543	4467	45,110
Barra	967	1353	1663	2241	3704	2517	1458	1128	15,032
Total	15,250	17,075	21,029	25,256	39,818	34,550	20,798	20,790	194,567

Source: HIAL and Caledonian MacBrayne carrying statistics and Macpherson Research monthly estimates

- During the March - October season 194,567 passengers arrived into the Western Isles. This figure includes both visitors to the islands and residents arriving back.
- Throughout the islands July and August constitute the busiest months, together accounting for 38% and 31% of the March - October season and the full year's transport figures, respectively. The increase in transport figures during these two months is sudden and substantial. The decline into September is equally abrupt.
- As with total transport in the Western Isles, there is a slight recovery during October and December. Figure 4.2 demonstrates the consistency in this trend throughout the isles, but due to its substantially higher volume of transport, Lewis highlights the extent of the peaks and troughs.
- Stornoway is by far the most popular entry point. In July 47% of all visitors to the Western Isles entered through Stornoway. In August this proportion rose to 50%.

Figure 4.2



4.5 Island to Island Transport Figures 2002

Table 4.4 represents the total volume of passengers travelling between the Western Isles of Lewis, Harris, the Uists and Barra during March – October 2002.

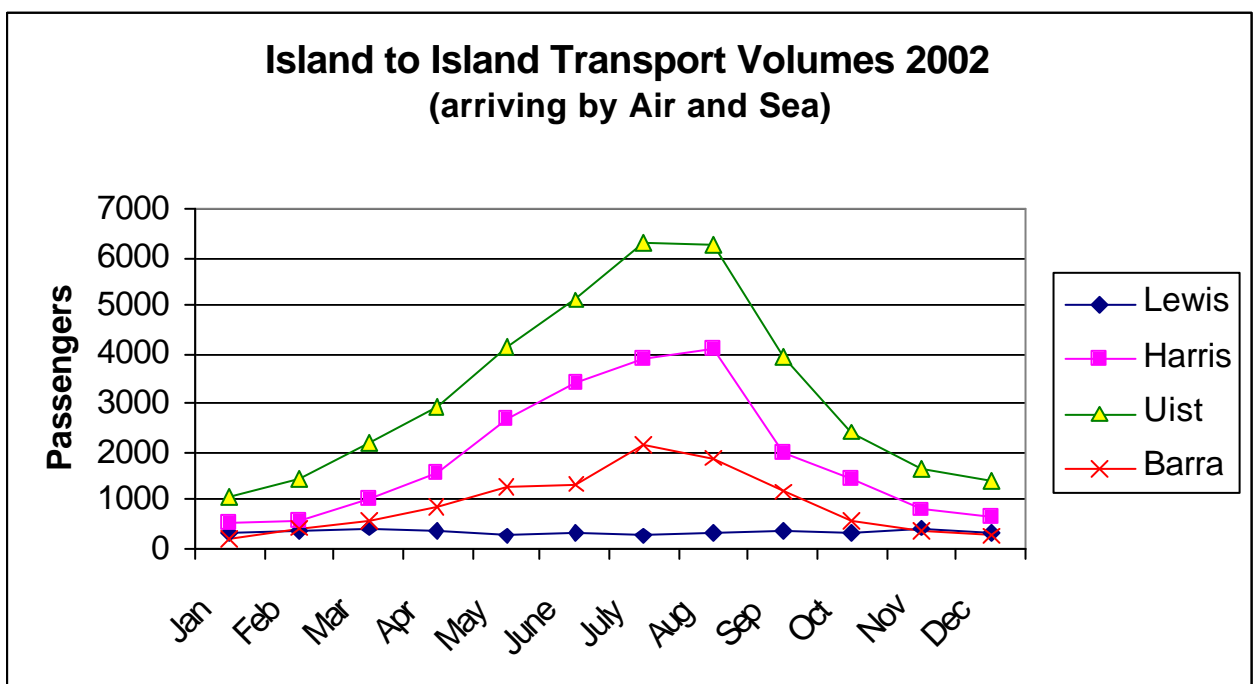
Table 4.4 Total Passenger Volume Travelling Between the Western Isles by Air and Sea

Island	Mar	Apr	May	June	July	Aug	Sep	Oct	Season
Lewis	439	374	291	296	283	294	351	338	2,666
Harris	1025	1545	2650	3412	3916	4115	1976	1428	20,067
Uist	2207	2930	4188	5104	6308	6273	3940	2398	33,347
Barra	611	852	1277	1318	2137	1858	1161	569	9,782
Total	4,282	5,700	8,406	10,130	12,643	12,540	7,428	4,733	65,862

Source: HIAL and Caledonian MacBrayne carrying statistics and Macpherson Research monthly estimates

- During the peak season 65,862 passengers (visitors and residents) travelled between Lewis, Harris, the Uists and Barra. As with travel into the islands, travel between these islands is also seasonally weighted.
- Travel into the Uists from other islands in July and August constitutes the largest proportion of island to island transport volumes, accounting for 38% and 33% of the March – October season and the years island to island carryings, respectively.
- Travel into Lewis from the other islands does not follow the same seasonal trend as Harris, the Uists and Barra. Indeed it has a lower volume of transport in the peak season than it does in the low season, with March constituting Lewis' busiest month for landings from other islands. Clearly this is due to the lack of any ferry links with other islands in the Western Isles.

Figure 4.3



4.6 Car & Coach Volumes 2002

Table 4.6 represents the number of cars that arrived into the Western Isles during the season March – October 2002. It should be noted that these are calculated estimates and not actual figures. Caledonian Macbrayne were only able to supply figures illustrating six monthly totals. These figures were then disaggregated into individual months using monthly landing figures from the previous three calendar years supplied by WITB as a guide and template.

Table 4.6 Total Volume of Cars arriving into the Western Isles

Island	Mar	Apr	May	June	July	Aug	Sep	Oct	Season
Lewis	1231	1801	1695	1880	2894	2542	1762	1948	15754
Harris	296	745	1067	1279	1999	1815	1111	826	9137
Uist	739	1205	1405	1651	2397	2024	1280	1174	11874
Barra	158	300	409	534	711	546	332	262	3253
Total	2,424	4,050	4,577	5,344	8,002	6,927	4,484	4,210	40,018

Source: Caledonian MacBrayne carrying statistics and Macpherson Research monthly estimates

- During the March - October 2002 season, an estimated 40,018 cars arrived into the Western Isles.
- An estimated 48,754 cars arrived into the Western Isles in the 2002 calendar year.
- The seasonal variance mirrors those for passengers, demonstrating a sharp rise towards July and August and an equally steep decline thereafter. Similarly, July and August were the busiest months.
- Car transport volumes into Lewis is consistent with the above description, but also contains two mini peeks during April and October.

Figure 4.4

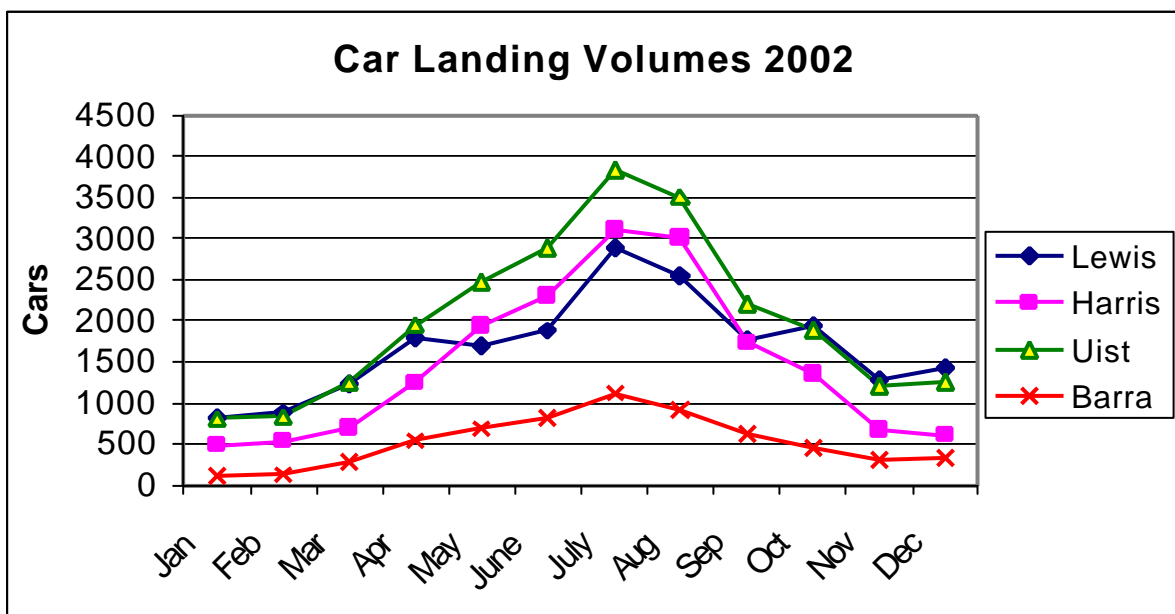


Table 4.7 represents the number of coaches landing at each island during the season March – October 2002. These are calculated estimates not actual figures. The methodology used is the same as for cars and passengers and is based on historic patterns applied to known totals

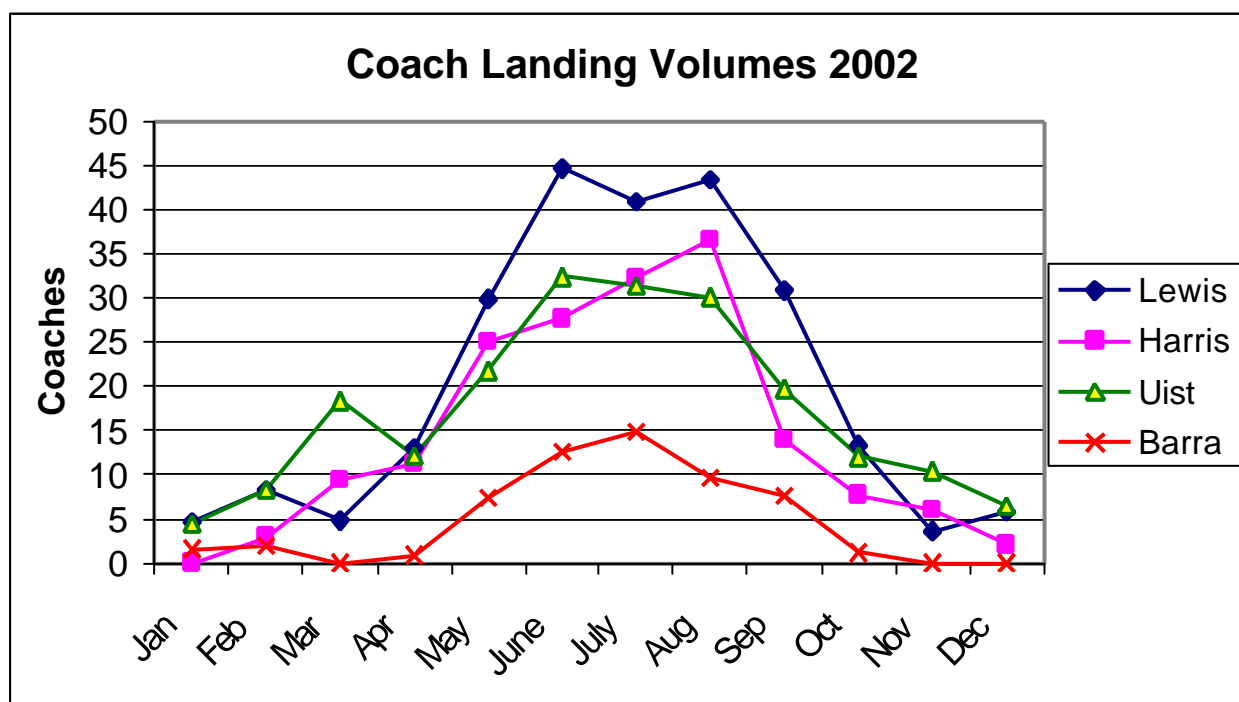
Table 4.7 Total Volume of Coaches Arriving into the Western Isles

Island	Mar	Apr	May	June	July	Aug	Sep	Oct	Season
Lewis	5	13	30	45	41	43	31	13	221
Harris	7	9	20	24	27	31	12	6	137
Uist	7	8	7	15	18	14	7	9	84
Barra	0	1	7	13	15	10	8	1	54
Total	20	30	65	96	101	97	57	29	496

Source: Caledonian MacBrayne carrying statistics and Macpherson Research estimates

- During the main season, an estimated 496 coaches arrived into the Western Isles.
- An estimated 538 coaches arrived into the Western Isles in the full calendar year 2002.
- July and August constitute the busiest months of the year for coach arrivals. Figure 5 demonstrates the extent to which the seasonal trend that is evident with regard to passengers and cars is significantly exaggerated by coach transport in the Western Isles.

Figure 4.5



4.7 Holiday, Business Visitor & Resident Transport Carrying

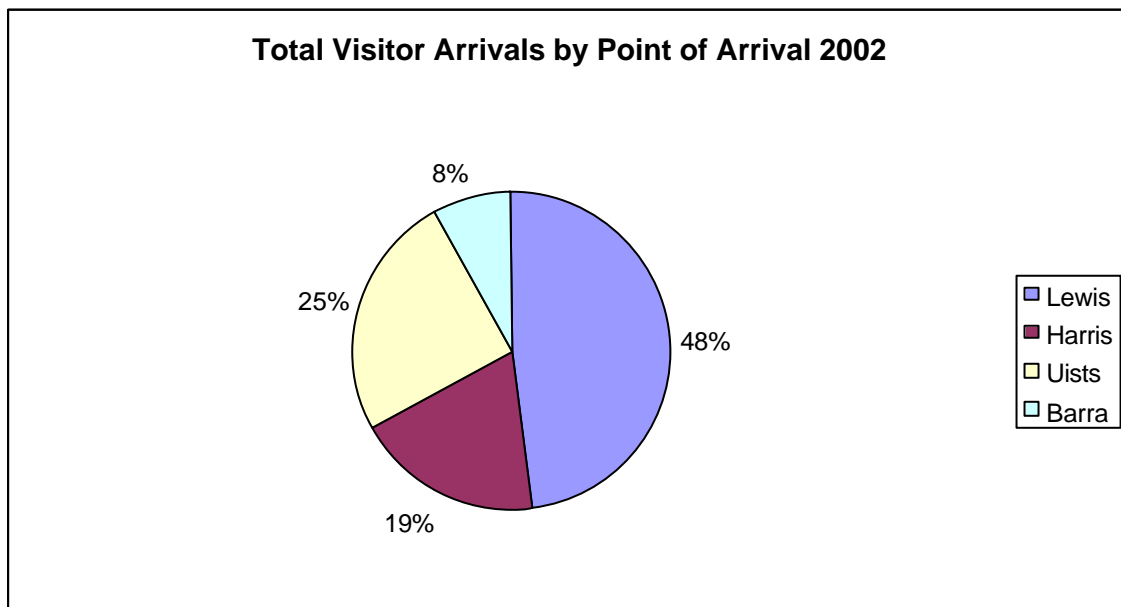
Using calibration data from the Western Isles Visitor Survey Report (1999), it was possible to estimate the proportion of the total transport carryings that can be attributed to the three categories of holiday visitors, business visitors and residents. People who may be coming to the Western Isles to visit friends or relatives, or who have personal or family reasons to visit have been included in the category of holiday visitors.

Table 4.8 Western Isles Visitors March – October 2002

Island	Total Arrivals	Residents Returning Home	Holiday Visitors	Business Visitors	Total Visitors
Lewis	103136	30,764	52615	19,757	72372
Harris	31288	2,295	25795	3,198	28993
Uists	45110	7,012	30436	7,662	38098
Barra	15032	2,906	10325	1,802	12127
W. Isles	194,567	42,977	119,171	32,419	151,590

Source: HIAL and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

Figure 4.6



NB The pie chart shows the proportion of visitors arriving into each of the islands. This does not necessarily reflect the magnitude of the tourism industry in each island, simply the first point of arrival.

4.8 Holiday Visitor Volumes 2002

Table 4.9 shows an estimate of the number of holiday visitors or those visiting friends and family (VFR).

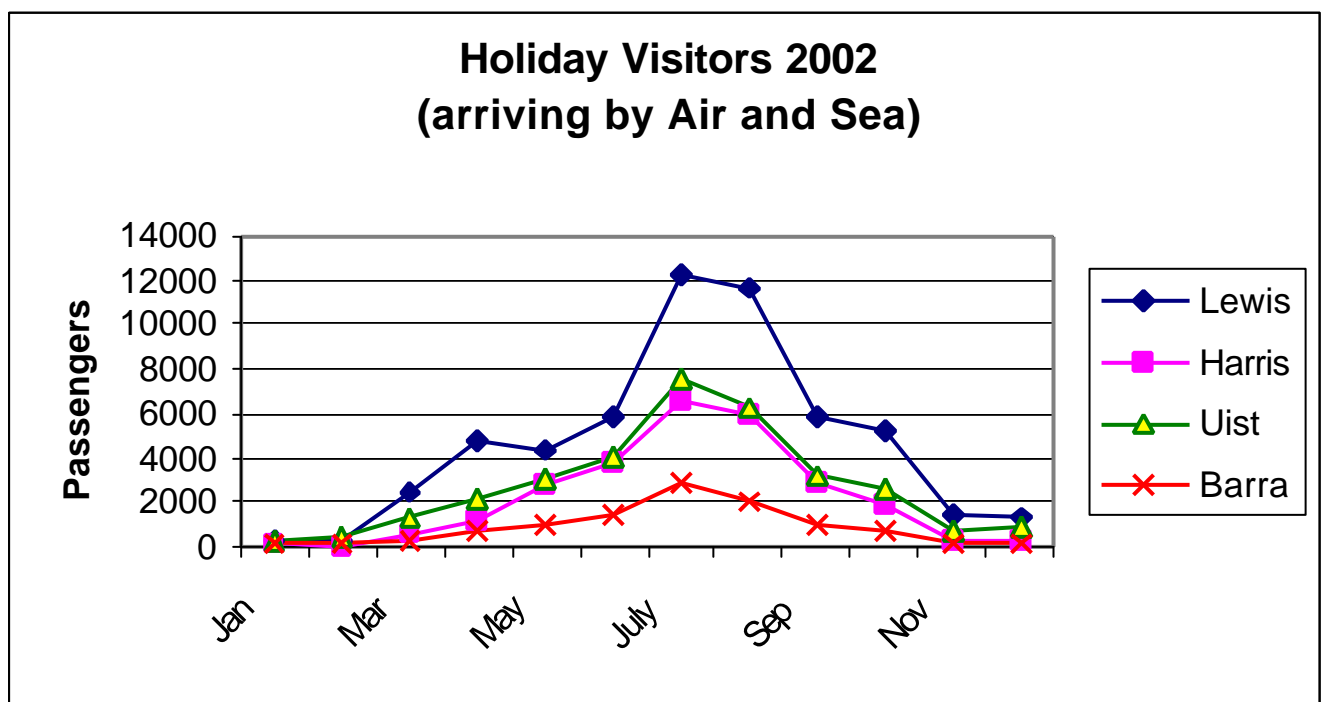
Table 4.9 Total Number of Holiday + VFR Passengers Arriving into the Western Isles

Island	Mar	Apr	May	June	July	Aug	Sep	Oct	Season
Lewis	2455	4878	4435	5773	12307	11701	5828	5239	52,615
Harris	648	1165	2824	3787	6573	5973	2888	1938	25,795
Uist	1355	2176	3134	4140	7594	6246	3192	2600	30,436
Barra	311	772	1037	1435	2988	2088	1037	657	10,325
Total	4,768	8,990	11,430	15,136	29,462	26,008	12,945	10,433	119,171

Source: HIAL and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

- During March – October 2002, an estimated 119,171 people visited the Western Isles on holiday.
- During the same period in 1999 109,197 people visited on holiday. Thus the volume of people visiting the Western Isles on holiday from March – October has increased by 9.1% between 1999 and 2002.
- July and August were the busiest months of the year accounting for 47% and 44% of the season and the full calendar year's total holiday visitors, respectively.

Figure 4.7



4.9 Business Visitor Volumes 2002

Table 4.10 shows an estimate of the number of business visitors arriving into the Western Isles by month and island.

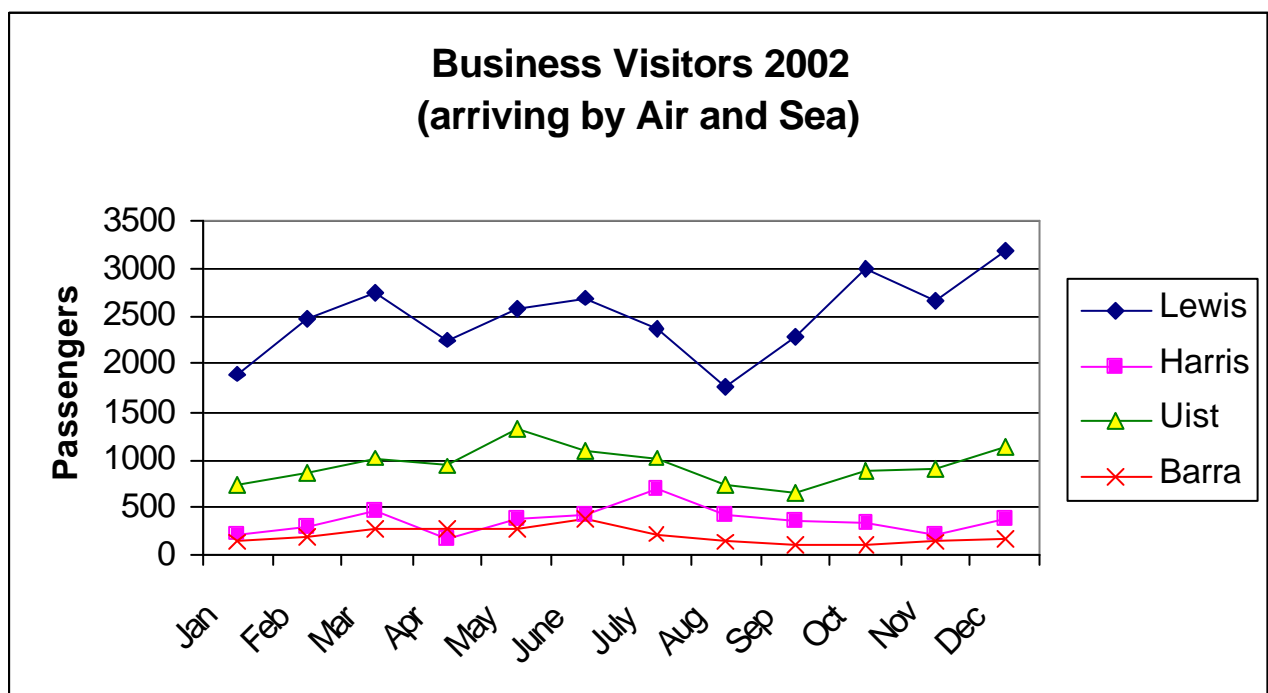
Table 4.10 Total Number of Business Passengers Arriving into the Western Isles

Island	Mar	Apr	May	June	July	Aug	Sep	Oct	Season
Lewis	2769	2254	2596	2699	2361	1768	2294	3016	19,757
Harris	465	178	379	401	688	412	348	327	3,198
Uist	1020	930	1326	1104	1011	742	655	874	7,662
Barra	277	272	278	384	208	140	124	118	1,802
Total	4,532	3,636	4,579	4,587	4,269	3,061	3,420	4,335	32,419

Source: HIAL and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

- During the March – October season 32,419 people travelled into Western Isles on business.
- During the same period in 1999 30,279 people visited on business. Thus the volume of people visiting the Western Isles on business from March – October has increased by 7.07% between 1999 and 200
- Lewis attracted 61% and 62% of the season and the year's business visitors, respectively, by first point of arrival.
- There are highs and lows throughout the year, especially in Lewis, but overall the pattern is fairly stable. There are slight dips associated with Easter and summer holiday periods.

Figure 4.8



4.10 Total Visitors 2002

Table 4.11 represents the total volume of visitors to the Western Isles during the season March – October 2002. It constitutes the sum of Holiday and Business visitors.

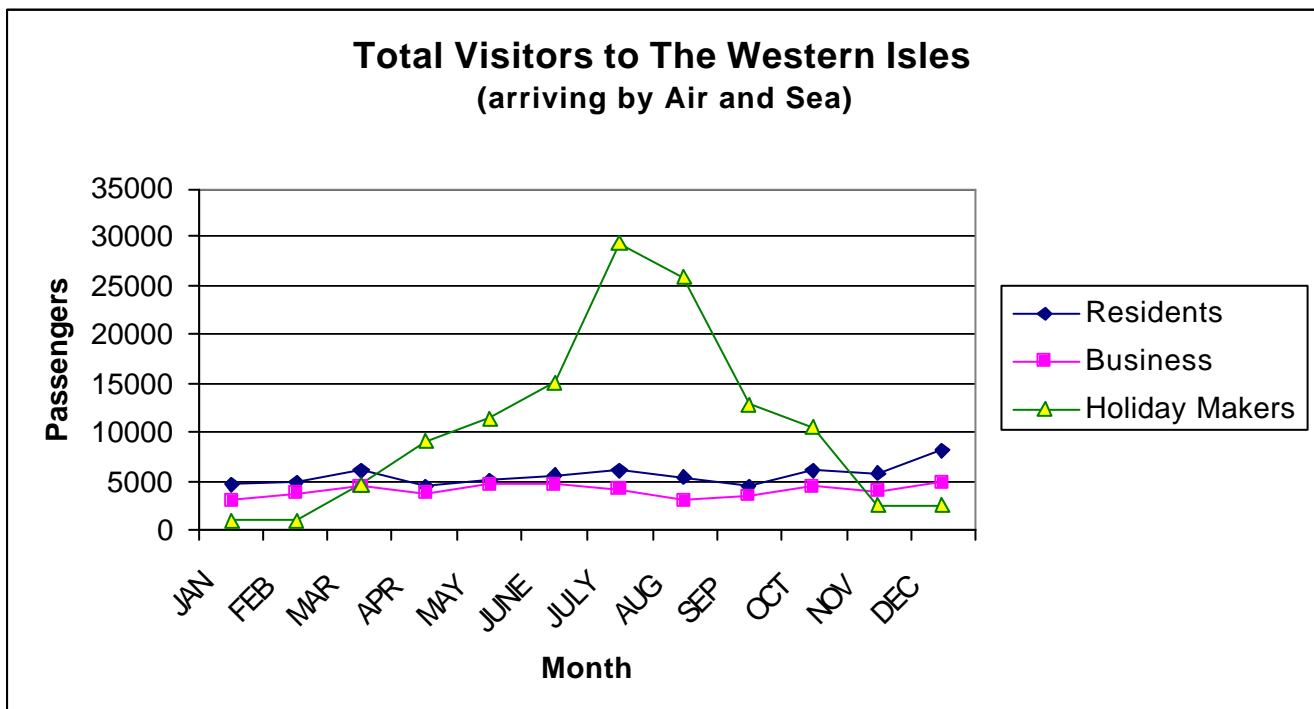
Table 4.11 Total Number of Visitors to the Western Isles 2002

Island	Mar	Apr	May	June	July	Aug	Sep	Oct	Season
Lewis	5224	7132	7030	8472	14668	13468	8122	8255	72,372
Harris	1113	1343	3203	4188	7261	6385	3236	2265	28,993
Uist	2375	3106	4461	5244	8605	6987	3847	3474	38,098
Barra	588	1044	1315	1819	3197	2229	1160	775	12,127
Total	9,300	12,626	16,009	19,723	33,731	29,069	16,365	14,768	151,590

Source: HIAL and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

- During the March – October season 151,590 visitors travelled into the Western Isles.
- July and August were the busiest months accounting for 41% and 36% of the season and the year's total visitors, respectively.
- Figure 4.9 demonstrates the extent to which the season is both weighted heavily towards the summer months of July and August, and how short-lived the peak season is throughout the Western Isles.

Figure 4.9



4.11 Resident Transport Volumes 2002

Table 4.12 shows an estimate of the number of Western Isles residents returning home from trips to the mainland.

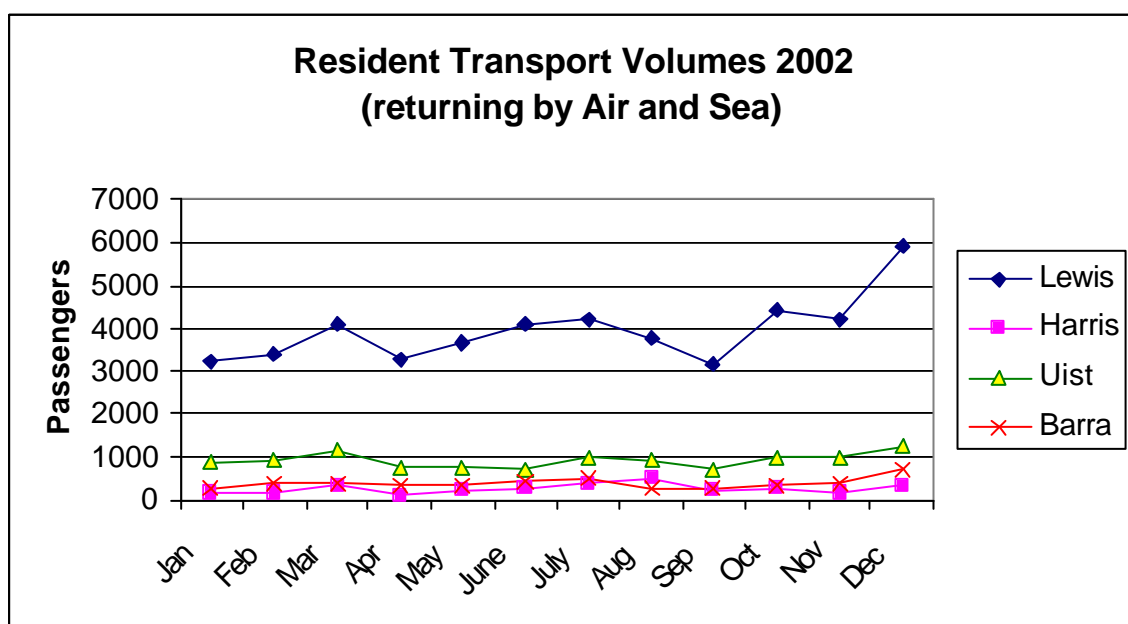
Table 4.12 Total Number of Residents Arriving back into the Western Isles

Island	Mar	Apr	May	June	July	Aug	Sep	Oct	Season
Lewis	4119	3271	3669	4115	4210	3760	3195	4424	30,764
Harris	310	119	241	267	382	481	244	252	2,295
Uist	1142	751	761	729	987	952	696	993	7,012
Barra	379	309	348	422	507	288	298	354	2,906
Total	5,950	4,449	5,020	5,533	6,087	5,481	4,433	6,022	42,977

Source: HIAL and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

- During March - October 42,977 residents travelled back into the Western Isles returning from trips to the mainland.
- During the same period in 1999 39,599 residents travelled back into the Western Isles. Thus the volume of residents returning to the Western Isles from March – October has increased by 8.5% between 1999 and 2002.
- 72% of the season and the year's residents returning to the Western Isles arrived into Lewis.
- The pattern of resident's travel is fairly steady throughout the year, except for Lewis which exhibits a seasonal rise in the last quarter of the year and a sharp increase in December.

Figure 4.10



5. TRANSPORT VOLUME GROWTH 1999 - 2002

The Previous section presented data detailing passenger, car and coach carrying volumes for the year 2002. Using data supplied by HIAL and WIE it is possible to present monthly transport figures for the last three calendar years, thus enabling a year on year comparison. This demonstrates the growth in transport carryings and visitor volumes to the Western Isles.

5.1 Total Western Isles Passenger Arrivals 1999 – 2002

Table 5.1 Total Number of Passengers Arriving into The Western Isles 2002

Island	Passenger Volume				% Growth Over Previous Year		
	1999	2000	2001	2002	2000	2001	2002
Lewis	95172	96574	100257	103136	1.5	3.8	2.9
Harris	28658	28322	28925	31288	-1.2	2.1	8.2
Uist	41689	40935	44609	45110	-1.8	9.0	1.1
Barra	13556	16061	16917	15032	18.5	5.3	-11.1
W. Isles	179,075	181,892	190,708	194,567	1.6	4.8	2.0

Source: HIAL, WITB and Caledonian MacBrayne carrying statistics

- During the 2002 March – October season there was an overall increase of 2% over the previous year in the volume of passengers travelling into the Western Isles from the mainland. In particular, the increase into Harris was 8.2%, whilst Barra's volume decreased by 11.1%.
- Although passenger carryings into the Western Isles continue to increase, growth in 2002 was less than half that of the previous year.

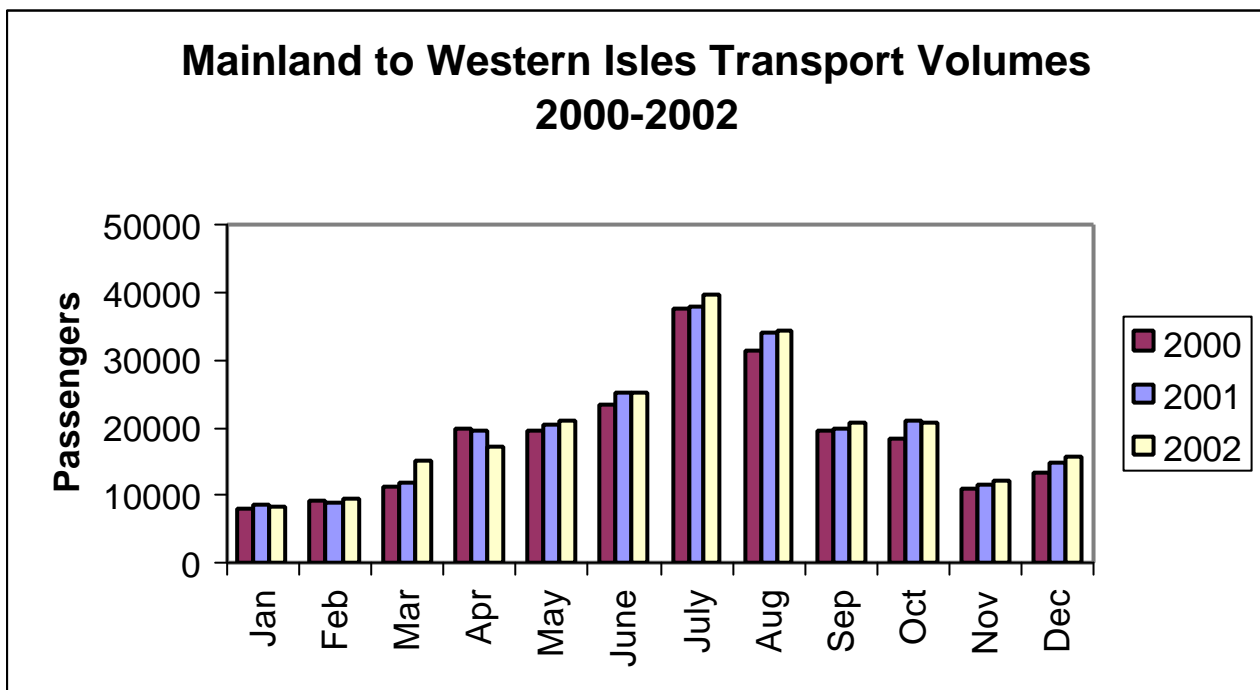
Table 5.2 % Growth 2001-2002 Mainland – Western Isles Transport Volumes

Island	Mar	Apr	May	June	July	Aug	Sep	Oct	Season
Lewis	20.6	-9.6	-0.2	0.1	8.7	2.1	8.0	-2.4	2.9
Harris	69.0	-31.3	12.8	6.7	12.8	9.0	6.8	4.9	8.2
Uist	35.9	-15.2	6.4	0.3	-0.1	-0.4	2.3	-2.7	1.1
Barra	60.4	-12.7	-15.1	-13.6	-11.6	-16.9	-14.7	-12.0	-11.1
W. Isles	29.5	-13.5	1.9	-0.2	5.0	1.1	4.6	-2.2	2.0

Source: HIAL, WITB and Caledonian MacBrayne carrying statistics

- Transport into the Western Isles increased dramatically during March compared to the previous year's figures. This was possibly due in part to the early celebration of Easter. The increase in Harris was almost 70%, and Barra 60%. This increase was partially offset by substantial decrease during April. However, this change may indicate that the season has extended into March in real terms. This smoothing of the beginning of the season is demonstrated in figure 5.1 below, where a slight extension into November and December is also discernible.

Figure 5.1



5.2 **Total Visitor Arrivals 1999 – 2002**

Table 5.3 presents a comparison of total visitor arrivals into the Western Isles from 1999 to 2002. This includes Holiday and Business Visitors. Holiday and Business Visitors are shown separately in 5.3 and 5.4.

Table 5.3 **Total Visitors to the Western Isles 1999 - 2002**

Island	1999		2000		2001		2002	
	Season	Year	Season	Year	Season	Year	Season	Year
Lewis	66810	79514	67990	80084	70405	83018	72372	86117
Harris	26594	28270	26328	27978	26857	28631	28993	30857
Uist	35112	40657	35956	41764	36517	42305	38098	44012
Barra	10959	11775	13064	14007	13801	14886	12127	13211
Total	139,476	160,217	143,337	163,833	147,580	168,840	151,590	174,197

Source: HIAL, WITB and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

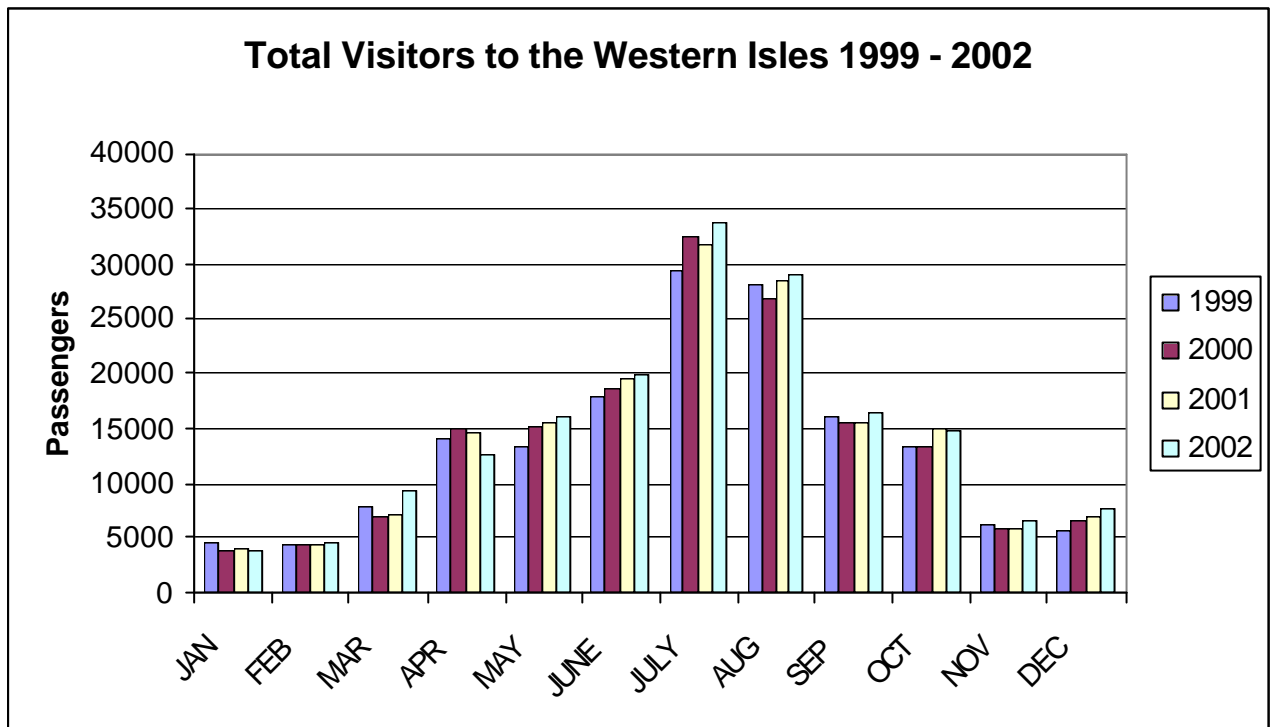
- 151,590 visitors arrived into the Western Isles during the March – October season 2002. This represents an increase of 2.7% over the previous year's season.
- There has been steady growth in the number of visitors to the isles over the last three calendar years, between 2.3% and 3.2%

Table 5.4 **Percentage Growth in Visitors to the Western Isles (Year on Year)**

Island	2000		2001		2002	
	Season	Year	Season	Year	Season	Year
Lewis	1.8	0.7	3.6	3.7	2.8	3.7
Harris	-1.0	-1.0	2.0	2.3	8.0	7.8
Uist	2.4	2.7	1.6	1.3	4.3	4.0
Barra	19.2	19.0	5.6	6.3	-12.1	-11.3
Total	2.8	2.3	3.0	3.1	2.7	3.2

Source: HIAL, WIE and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

Figure 5.2



5.3 Holiday Visitor Arrivals 1999 – 2002

Table 5.5 Total Holiday Visitors to the Western Isles 1999 - 2002

Island	1999		2000		2001		2002	
	Season	Year	Season	Year	Season	Year	Season	Year
Lewis	48327	51431	49650	52718	51212	54424	52615	56107
Harris	23729	24405	23548	24173	23985	24680	25795	26522
Uist	27836	29901	28468	30689	28946	31118	30436	32729
Barra	9305	9681	11208	11591	11892	12353	10325	10774
Total	109,197	115,418	112,874	119,171	116,035	122,574	119,171	126,132

Source: HIAL, WITB and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

- From the 151,590 visitors to the Western Isles during the March – October season 2002, 119,171 were holiday visitors.
- This represents a 2.7% increase from the previous year in the number of visitors travelling into the Western Isles for the purpose of holiday.
- There has been steady growth in the number of holiday visitors over the last three calendar years, between 2.7% and 3.3%

Table 5.6 Percentage Growth in Holiday Visitors to the Western Isles (Year on Year)

Island	2000		2001		2002	
	Season	Year	Season	Year	Season	Year
Lewis	2.7	2.5	3.1	3.2	2.7	3.1
Harris	-0.8	-1.0	1.9	2.1	7.5	7.5
Uist	2.3	2.6	1.7	1.4	5.1	5.2
Barra	20.5	19.7	6.1	6.6	-13.2	-12.8
Total	3.4	3.3	2.8	2.9	2.7	2.9

Source: HIAL, WITB and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

5.4 Business Visitor Arrivals 1999 – 2002

Table 5.7 Total Business Visitors to the Western Isles 1999 - 2002

Island	1999		2000		2001		2002	
	Season	Year	Season	Year	Season	Year	Season	Year
Lewis	18483	28083	18340	27366	19193	28595	19757	30011
Harris	2865	3865	2780	3805	2871	3952	3198	4335
Uist	7276	10756	7488	11075	7572	11187	7662	11283
Barra	1654	2094	1856	2416	1909	2532	1802	2437
Total	30,279	44,799	30,464	44,662	31,545	46,266	32,419	48,065

Source: HIAL, WITB and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

- From the 151,590 visitors to the Western Isles during the March – October season 2002, 32,419 were business visitors.
- This represents a 2.8% increase from the previous year in the number of visitors travelling into the Western Isles for the purpose of business.

Table 5.8 Percentage Growth in Business Visitors to the Western Isles (Year on Year)

Island	2000		2001		2002	
	Season	Year	Season	Year	Season	Year
Lewis	-0.8	-2.6	4.7	4.5	2.9	5.0
Harris	-2.9	-1.5	3.3	3.8	11.4	9.7
Uist	2.9	3.0	1.1	1.0	1.2	0.9
Barra	12.2	15.4	2.9	4.8	-5.6	-3.8
Total	0.6	-0.3	3.6	3.6	2.8	3.9

5.5 Resident Transport Volumes 1999 – 2002

Table 5.9 Total Residents Returning to the Western Isles 1999 - 2002

Island	1999		2000		2001		2002	
	Season	Year	Season	Year	Season	Year	Season	Year
Lewis	28362	43762	28584	43820	29852	45941	30764	47521
Harris	2064	2814	1994	2748	2068	2877	2295	3145
Uist	6577	10517	7328	11388	8092	12279	7012	11090
Barra	2597	3802	2997	4655	3116	4926	2906	4655
Total	39,599	60,894	40,904	62,611	43,128	66,023	42,977	66,410

Source: HIAL, WITB and Caledonian MacBrayne carrying statistics and Macpherson Research calibrations

- The volume of residents travelling into the Western Isles grew steadily from 1999 to 2001. However, this growth slowed considerably between 2001 and 2002. Indeed there was only marginal growth between these two years.

Table 5.10 Percentage Growth in Residents Returning to the Western Isles (Year on Year)

Island	2000		2001		2002	
	Season	Year	Season	Year	Season	Year
Lewis	0.8	0.1	4.4	4.8	3.1	3.4
Harris	-3.4	-2.3	3.7	4.7	11.0	9.3
Uist	11.4	8.3	10.4	7.8	-13.3	-9.7
Barra	15.4	22.5	4.0	5.8	-6.7	-5.5
Total	3.3	2.8	5.4	5.4	-0.4	0.6

6. UTILISATION OF TRANSPORT CAPACITY 2002

This section presents the proportion of potential transport capacity into the Western Isles that was utilised during the season March – October 2002. It is simply the arrival/landing figures taken as a percentage of the available passenger and car space on either the airlines or ferries. For example, in the month of March 2002 the combined passenger capacity availability for all flights arriving into Stornoway from Inverness was 2236 passengers. Given that 1264 passengers travel by air from Inverness to Stornoway in March 2002 the loading capacity is equal to 56.5%.

6.1 Utilisation of Flight Capacity (Arrivals)

Table 6.1 Capacity Utilisation 2002 – Flight Arrivals

Lewis	Mar	Apr	May	June	July	Aug	Sep	Oct
Inverness	56.5	51.6	54.5	56.7	50.7	50.9	55.4	62.3
Edinburgh	61.8	65.4	72.8	86.5	83.1	82.9	58.1	52.7
Glasgow	63.7	56.7	60.1	57.9	70.4	71.3	68.2	64.4
Benbecula	58.1	47.2	35.1	41.1	34.2	37.1	46.4	40.8
Uist								
Glasgow	49.8	44.6	48.0	51.4	59.0	57.3	45.2	48.5
Barra	21.3	26.1	28.1	30.5	41.2	41.1	31.8	18.1
Barra								
Glasgow	40.1	47.2	47.6	48.6	56.2	50.0	43.2	34.5

Source: HIAL carrying statistics

- Edinburgh and Glasgow flights into Stornoway both experience very high load capacities during the busy months. This demand has been recognised and alleviated by the introduction of BMI flights from Edinburgh to Stornoway.
- Figure 1 illustrates the growth and decline in loading capacity on flights arriving into Stornoway from March to October 2002. Flights from Edinburgh and Glasgow both experience higher loading capacities during the peak summer months of June, July and August. However, flights from Inverness and Benbecula experience their lowest loading capacities during the same summer period. This trend could indicate that flights from Inverness and Barra rely more upon business travel than flights from Edinburgh and Glasgow.

Figure 6.1

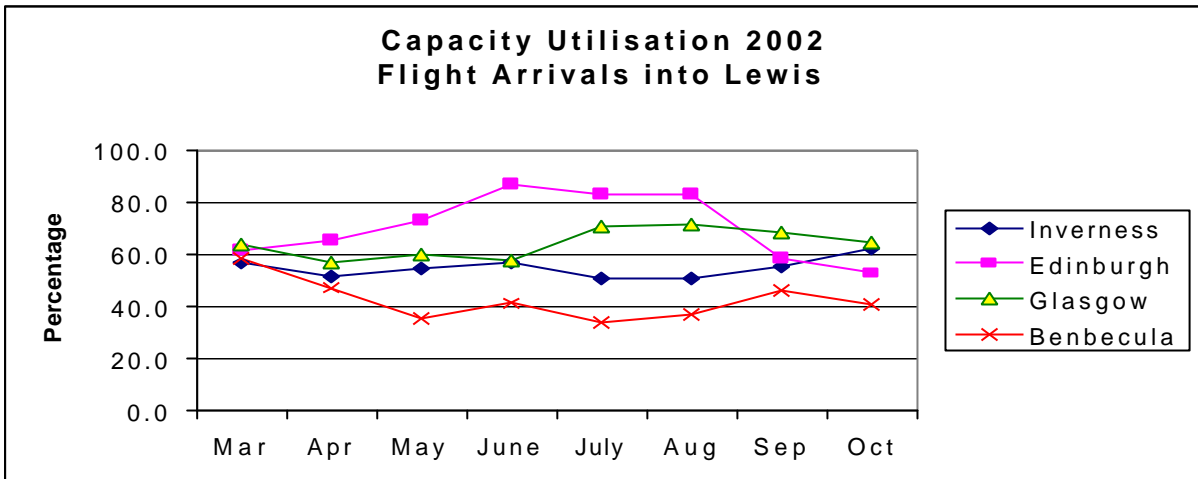


Figure 6.2

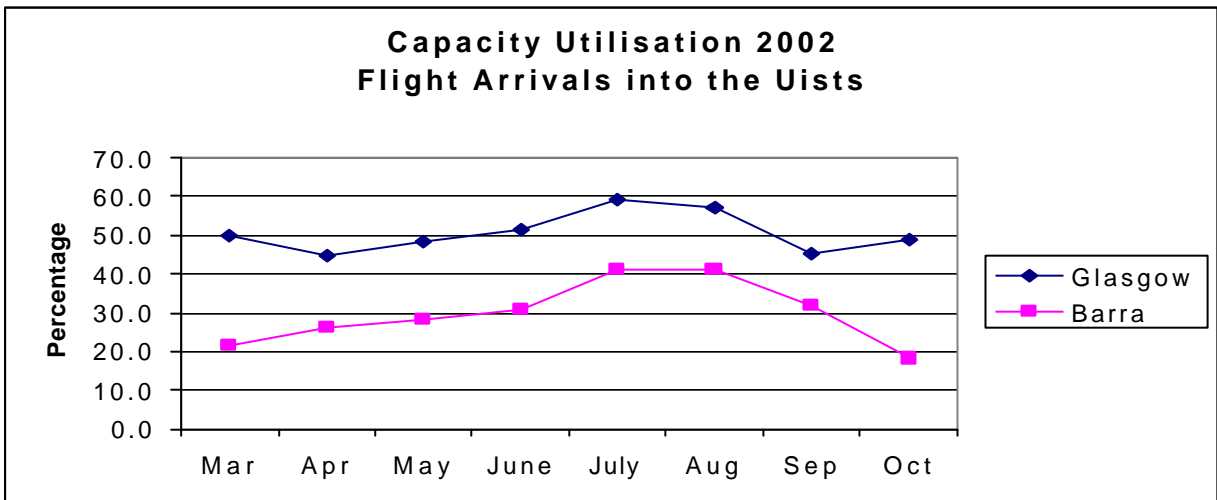
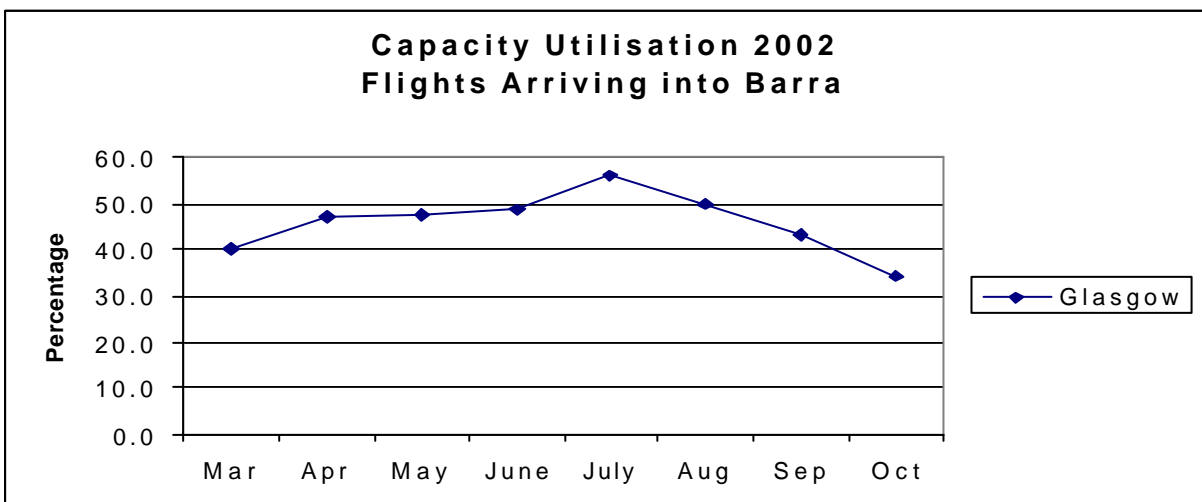


Figure 6.3



6.2 Utilisation of Ferry Capacity (Arrivals)

The loading capacity figures for ferry passengers and cars is calculated on the same basis as for flights, i.e. It is the landing figures taken as a percentage of the available passenger and car space on the ferries. It must be noted that the passenger carrying capacity is very large on most ferries and does not represent a constraint on carryings. In reality the number of passengers is more realistically influenced by the capacity of the vehicle deck. This explains the seemingly low passenger capacity that has been utilised in 2002.

Table 6.2 Capacity Utilisation 2002 – Passenger Arrivals

Port	Mar	Apr	May	June	July	Aug	Sep	Oct	Season	Year
Stornoway	17.0	20.8	19.8	27.4	35.2	32.3	20.5	24.3	25.0	21.7
Tarbert	10.6	6.1	13.7	17.3	27.8	26.1	14.6	10.3	16.4	14.0
Lochmaddy	9.1	8.9	11.2	12.1	19.5	15.1	10.2	9.7	12.1	10.4
Castlebay/ Lochboisdale	19.0	9.0	11.9	16.4	29.9	20.3	10.6	8.5	15.4	14.8

Source: Caledonian MacBrayne carrying statistics and Macpherson Research monthly estimates

- There is a clear seasonal variance on each of the ferry crossings into the Western Isles, with Capacity utilisation being twice as high in the peak month of July than it is in the shoulder months of March and October.

Figure 6.2

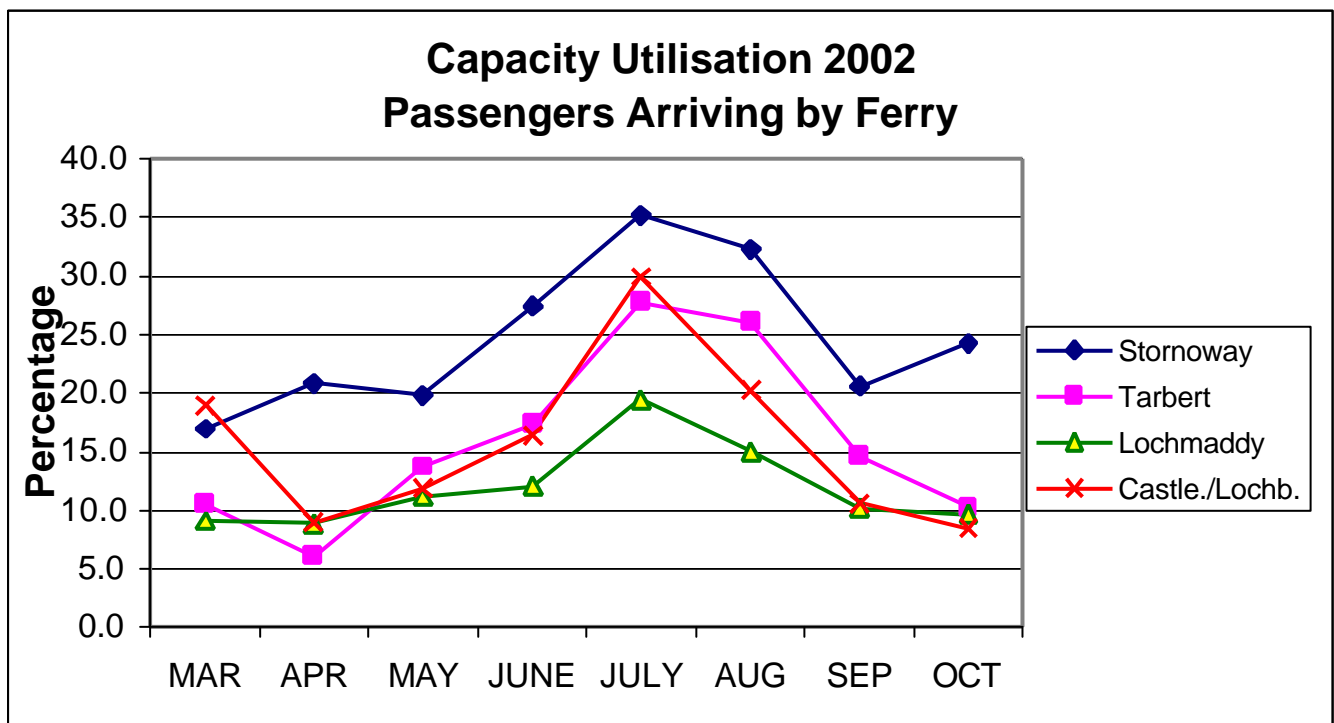


Table 6.3 Capacity Utilisation 2002 – Car Arrivals

Port	Mar	Apr	May	June	July	Aug	Sep	Oct	Season	Year
Stornoway	19.2	28.2	25.5	30.6	37.4	33.9	25.6	29.3	29.0	26.0
Tarbert	12.2	17.4	23.7	27.7	40.4	38.4	25.9	18.8	26.7	23.4
Lochmaddy	14.4	22.4	26.2	27.9	34.7	27.4	17.6	16.7	23.3	20.1
Castlebay/ Lochboisdale	38.4	19.0	26.9	35.4	48.7	38.1	21.7	17.8	30.1	30.6

Source: Caledonian MacBrayne carrying statistics and Macpherson Research estimates

- The car loading capacity figures in table 9 demonstrate an estimate based on the total volume of cars each ferry is capable of carrying. However, on each crossing it is more than likely that cars will have to share the loading deck with coaches, caravans and freight. The figures above show the capacity utilisation as if only cars were being carried. Therefore it is possible that in instances when the car loading capacity is said to be only say, 27%, there may actually be little or no space left because of the presence of freight and coaches.

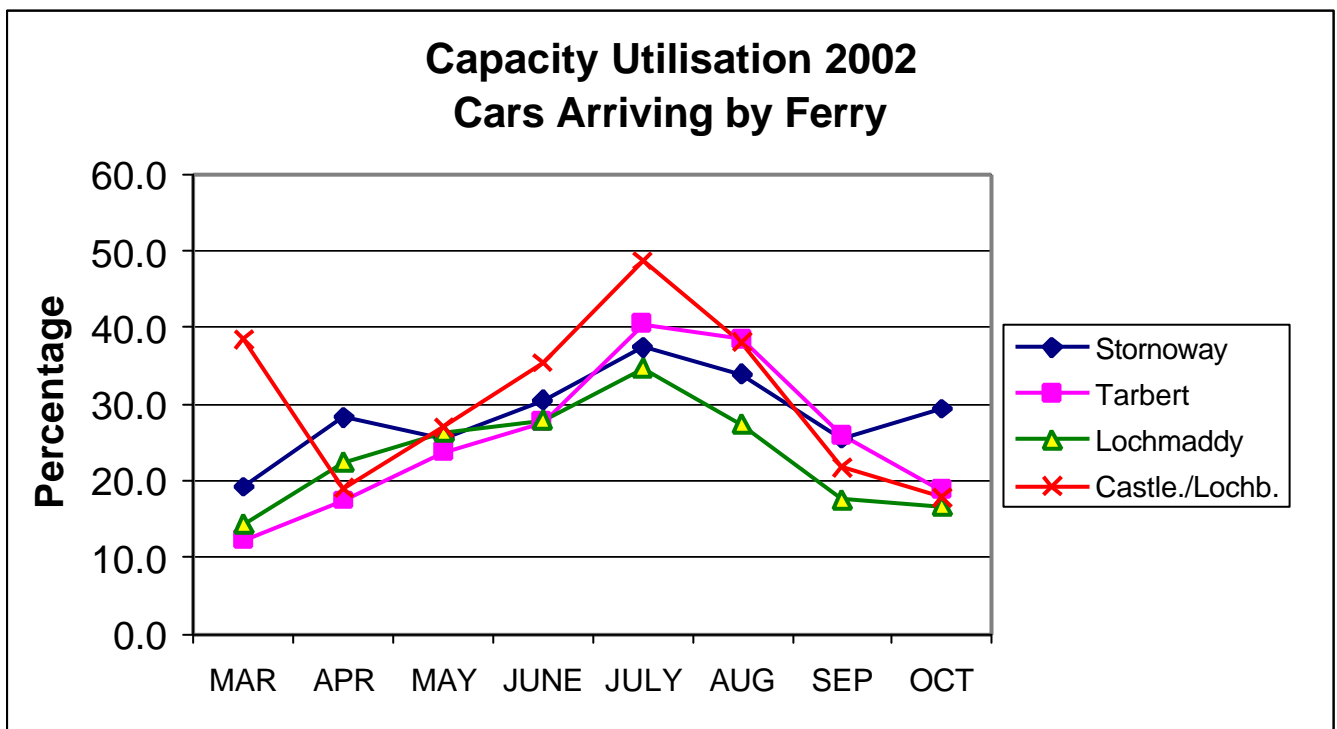
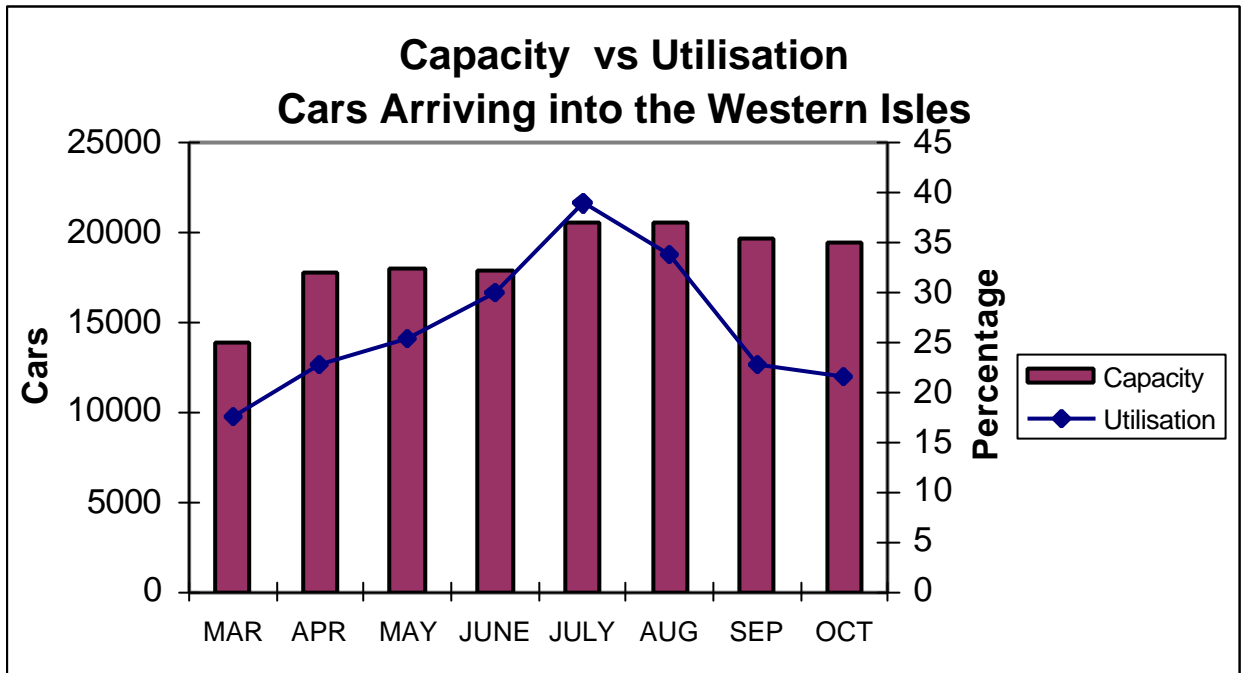
Figure 6.3

Figure 6.4 shows a comparison between the available capacity for cars arriving into the Western Isles in 2002, against the proportion of capacity that was utilised. Despite the increase in capacity for the peak summer months, the percentage utilised still increased significantly in the summer peak of June, July and August.

Figure 6.4



6.3 Conclusion in connection with transport capacities

- It would appear that there was little or no constraint on the volume of visitors arriving into the Western Isles that could be attributed to transport capacities in 2002. Even in peak months there would still appear to be sufficient space for both passengers and cars. However, this analysis hides a number of factors:
 1. It is possible that there are specific sailings or days in the week when a transport capacity constraint does exist and that these occasions are hidden by the weekly average data. From speaking to providers of accommodation and the TIC staff in the Western Isles ferry ports, it appears that there is a capacity constraint on ferry sailings midweek during the peak months of July and August, between the Isles and the mainland. However, they also stated that this midweek concentration is offset by low utilisation of capacity at the weekend. This causes the average figure to suggest that there is no capacity constraint, when certain routes or sailings may indeed have an excess of demand.
 2. The same problem may exist for certain weeks within months. It is possible that Easter week is much busier than is suggested by the monthly average. However, the shoulder weeks either side will factor down the average capacity utilisation figure.
 3. It is not possible to measure any excess or unsatisfied demand for specific flights or ferry crossings that may exist during the busy months. There is no way of knowing from the carrying data how many people did not travel to the Western Isles because they could not get a ticket for a specific flight or ferry.
- From discussions with the transport carriers, it is probably safe to say that there are very few occasions when there is no available space, or when capacity reaches 100%. Caledonian MacBrayne mentioned that there were only two or three sailings in 2002 when the ferry was at maximum capacity.

7. AVAILABLE TRANSPORT CAPACITY 2003

This section presents the total volume of passengers that it will be possible to transport into and between the islands during the season from March to October 2003. Based on information made available by Highlands & Islands Airports Limited and the respective airlines (British Airways, Highland Airways and British Midland International) and ferry providers (Caledonian MacBrayne and Western Isles Council), it is possible to calculate the total available passenger, car and coach capacity both into and between the Western Isles.

The only significant change in capacity from 2002 to 2003 occurs on the flight route from Edinburgh - Stornoway. British Airways have introduced additional flights, and British Midlands International has entered as a new carrier, providing flights seven days a week. The only other alteration is the change of ferry provider from council to Caledonian MacBrayne on the ferry crossing between Barra and Eriskay.

7.1 Flight Capacity 2003

Table 7.1 Flight Capacity 2003

Stornoway	Mar	Apr	May	June	July	Aug	Sep	Oct	Season	Year
Inverness	2236	2236	2322	2150	2322	2288	2184	2322	18060	26918
Edinburgh	1825	1776	1825	1776	1825	1825	1776	1825	14453	21655
Glasgow	3102	3168	3432	3300	3564	3564	3234	3300	26664	39138
Benbecula	756	792	828	720	828	792	756	828	6300	9396
	7,919	7,972	8,407	7,946	8,539	8,469	7,950	8,275	65,477	97,107
Benbecula										
Glasgow	1716	1716	1782	1650	1782	1782	1650	1782	13860	20658
Barra	399	418	437	380	437	418	399	437	3325	4959
	2,115	2,134	2,219	2,030	2,219	2,200	2,049	2,219	17,185	25,617
Barra										
Glasgow	494	494	513	570	589	608	551	589	4408	6536
	494	494	513	570	589	608	551	589	4,408	6,536
All Routes	10,528	10,600	11,139	10,546	11,347	11,277	10,550	11,083	87,070	129,260

Source: HIAL, British Airways, Highland Airways, British Midland International

- For 2003 British Airways, Highland Airways and British Midland International will be providing capacity for 114,905 passengers to travel from the mainland into the Western Isles. Departing from Inverness, Edinburgh and Glasgow. Arriving into Stornoway, Benbecula and Barra.

- Figures 1,2 & 3 illustrate the variance in flight capacity from January through December 2003. The capacity is fairly static on each of the routes, with slight increases in December, and July and August, particularly with arrivals into Barra from Glasgow.

Figure 7.1

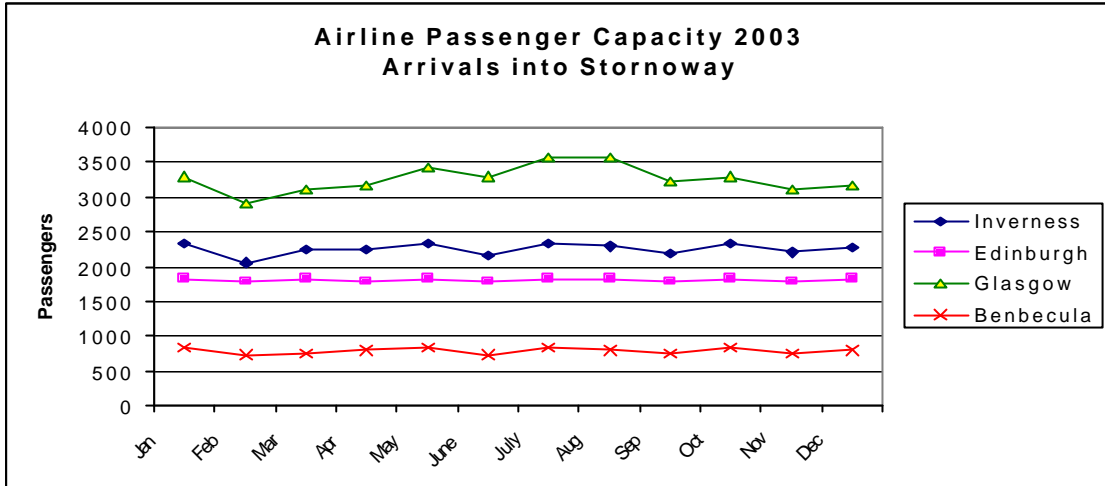


Figure 7.2

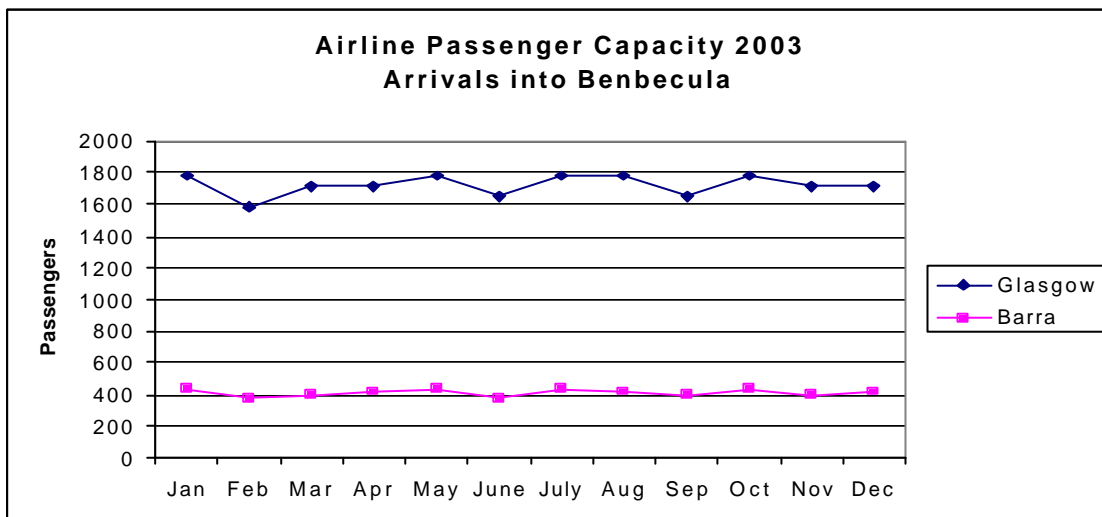


Figure 7.3

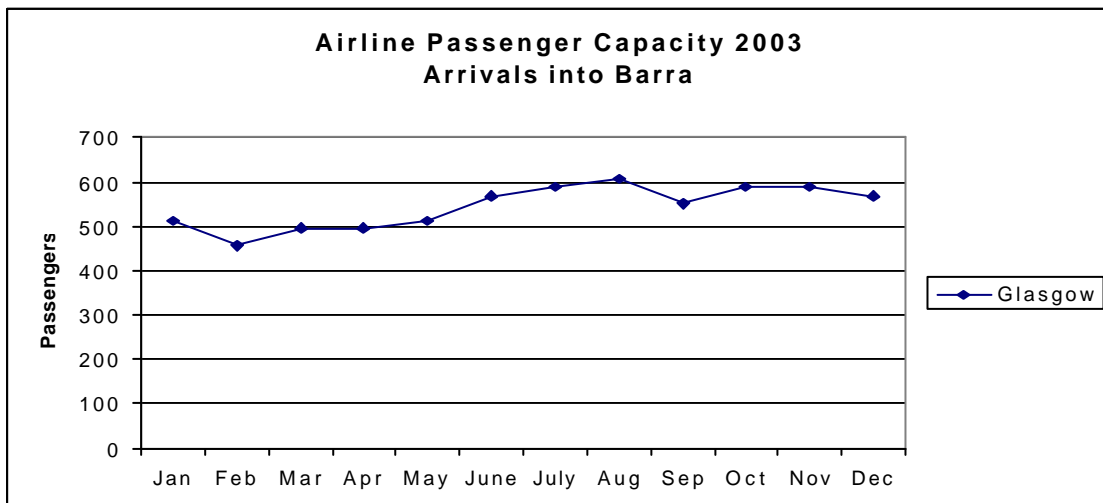


Table 7.2 Mainland – Isles & Island to Island Flight Capacity 2003

	Mar	Apr	May	June	July	Aug	Sep	Oct	Season	Year
Island - Island	1155	1210	1265	1100	1265	1210	1155	1265	9,625	14,355
Mainland – W. Isles	9373	9390	9874	9446	10082	10067	9395	9818	77,445	114,905

Source: HIAL, British Airways, Highland Airways, British Midland International

- Mainland to Western Isles capacity for 2003 season has increased by 20.2% over 2002 season and 16.6% for the year.
- Island to Island capacity remains the same from 2002 to 2003.

7.2 Ferry Capacity 2003

- The maximum passenger capacity on board ferries is extremely high. In reality the maximum number of passengers is influenced more by the capacity of the loading deck. For example, the passenger capacity could be expressed as the maximum number of car space multiplied by the average capacity of a car: $250 \times 4 = 1,000$. However, on its own this is still limiting, as it would not include foot passengers. Therefore, the capacities in table 7.3 might be unrealistically high, whereas the capacities in table 7.4 might be too low.

Table 7.3 Maximum Ferry Passenger Capacity 2003

Mainland – W. Isles	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Oban –								
Castlebay/Lochboisdale	6578	18502	20416	19778	19140	20416	19778	19140
Uig – Lochmaddy	23868	28764	29988	31824	31824	33048	28764	29988
Uig – Tarbert	13464	23868	25092	25704	27540	26316	23868	24480
Ullapool – Stornoway	35360	35360	36720	34000	42840	41480	38080	36720
	79,270	106,494	112,216	111,306	121,344	121,260	110,490	110,328
Island – Island	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Barra – Eriskay	4400	22500	23250	22500	23250	23250	24000	23250
Berneray – Leverburgh	2500	18200	21600	20000	21600	20800	19600	16200
	6900	40700	44850	42500	44850	44050	43600	39450
All Routes	86,170	147,194	157,066	153,806	166,194	165,310	154,090	149,778

Source: Caledonian MacBrayne

- The only change in the passenger capacity of ferry transportation from 2002 to 2003 will affect the crossing between Barra and Eriskay. Caledonian MacBrayne will be providing a new service from April 2003, in place of the existing council run service. This will increase passenger and vehicle capacity on each crossing.

Table 7.4 Ferry Passenger Capacity 2003 (max no. of cars x 4)

Mainland - W. Isles	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Oban -								
Castlebay/Lochboisdale	2,912	10,440	11,520	11,160	10,800	11,520	11,160	10,800
Uig - Lochmaddy	17,160	18,040	15,840	17,160	20,680	21,560	22,880	22,880
Uig - Tarbert	9,680	17,160	18,040	18,480	19,800	18,920	17,160	17,600
Ullapool - Stornoway	25,584	25,584	26,568	24,600	30,996	30,012	27,552	26,568
	55,336	71,224	71,968	71,400	82,276	82,012	78,752	77,848
Island - Island	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Barra - Eriskay	6,336	10,800	11,160	10,800	11,160	11,160	11,520	11,160
Berneray - Leverburgh	7,200	13,104	15,552	14,400	15,552	14,976	14,112	11,664
	13,536	23,904	26,712	25,200	26,712	26,136	25,632	22,824
All Routes	68,872	95,128	98,680	96,600	108,988	108,148	104,384	100,672

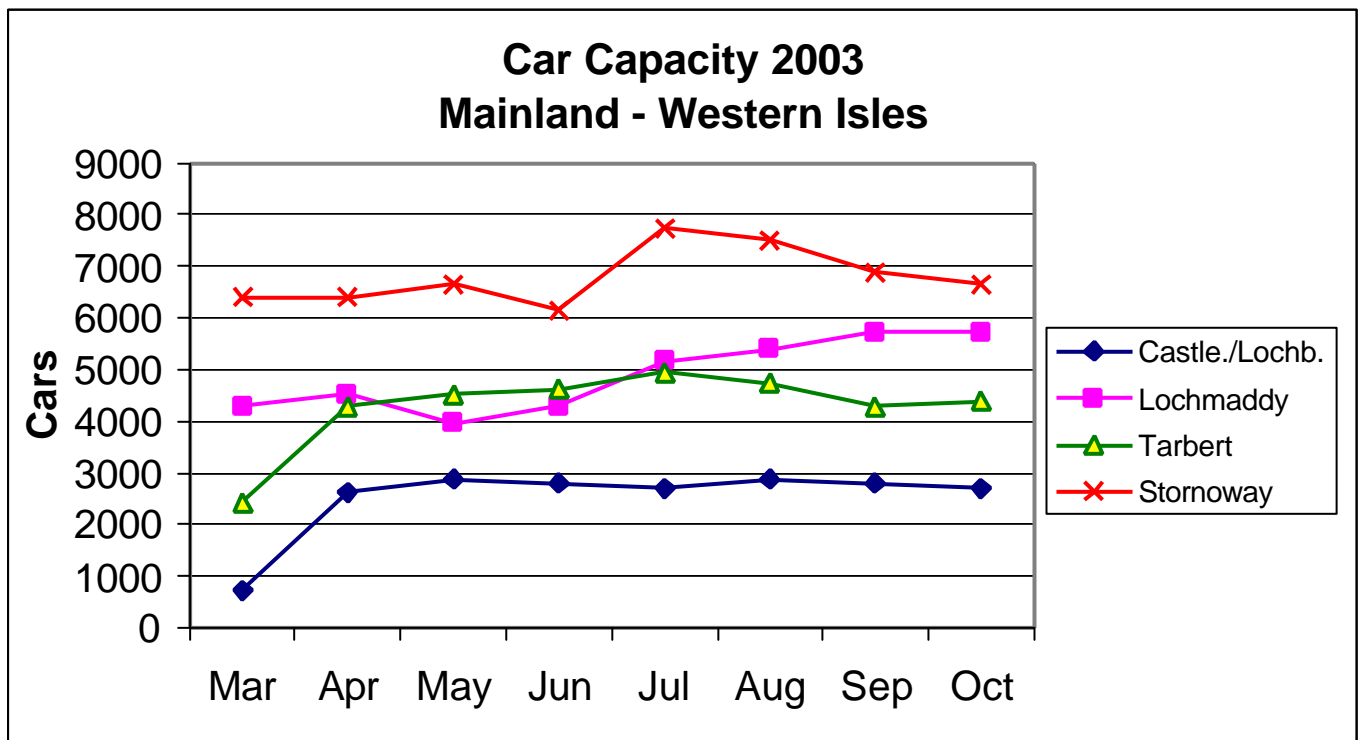
Table 7.5 Car Capacity 2003

Mainland – W. Isles	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Year
Oban – Castlebay/Lochboisd ale	728	2,610	2,880	2,790	2,700	2,880	2,790	2,700	23,326
Uig – Lochmaddy	4,290	4,510	3,960	4,290	5,170	5,390	5,720	5,720	56,100
Uig – Tarbert	2,420	4,290	4,510	4,620	4,950	4,730	4,290	4,400	43,560
Ullapool – Stornoway	6,396	6,396	6,642	6,150	7,749	7,503	6,888	6,642	77,613
	13,834	17,806	17,992	17,850	20,569	20,503	19,688	19,462	200,599
Island - Island	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Year
Barra – Eriskay	1,584	2,700	2,790	2,700	2,790	2,790	2,880	2,790	27,198
Berneray – Leverburgh	1,800	3,276	3,888	3,600	3,888	3,744	3,528	2,916	30,240
	3,384	5,976	6,678	6,300	6,678	6,534	6,408	5,706	57,438
All Routes	17,218	23,782	24,670	24,150	27,247	27,037	26,096	25,168	258,037

Source: Caledonian MacBrayne

Figure 7.4 illustrates the seasonal variation in capacity for cars from March to October 2003 on board the Caledonian MacBrayne ferry services from the mainland to the Western Isles.

Figure 7.4



- The following 2003 capacity for coaches was estimated as one sixth of the 2003 capacity for cars. This was the method of calculation best recommended by Caledonian MacBrayne.

Table 7.6 Ferry Coach Capacity 2003

Mainland – W. Isles	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Year
Oban –									
Castlebay/Lochboisdale	195	435	480	465	450	480	465	450	3961
Uig – Lochmaddy	715	862	898	953	953	990	862	898	9973
Uig – Tarbert	403	715	752	770	825	788	715	733	7260
Ullapool – Stornoway	1066	1066	1107	1025	1292	1251	1148	1107	12936
	2,379	3,078	3,237	3,213	3,520	3,509	3,190	3,189	34,130
Island – Island	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Year
Barra – Eriskay	264	450	465	450	465	465	480	465	4533
Berneray – Leverburgh	300	546	648	600	648	624	588	486	5040
	564	996	1113	1050	1113	1089	1068	951	9573
All Routes	2,943	4,074	4,350	4,263	4,633	4,598	4,258	4,140	43,703

Source: Caledonian MacBrayne

7.3 Total Capacity 2003

Table 7.7 Total Mainland to Western Isles Capacity 2003

	Mar	Apr	May	June	July	Aug	Sep	Oct	Season	Year
Ferry	79270	106494	112216	111306	121344	121260	110490	110328	872708	1177456
Flight	9373	9390	9874	9446	10082	10067	9395	9818	77445	114905
Total	88,643	115,884	122,090	120,752	131,426	131,327	119,885	120,146	950,153	1,292,361

Table 7.8 Total Mainland to Western Isles Capacity 2003 (ferry estimate based on 7.4)

	Mar	Apr	May	June	July	Aug	Sep	Oct	Season	Year
Ferry	55336	71224	71968	71400	82276	82012	78752	77848	590816	802396
Flight	9373	9390	9874	9446	10082	10067	9395	9818	77445	114905
Total	64,709	80,614	81,842	80,846	92,358	92,079	88,147	87,666	668,261	917,301

- Total capacity for travel into the Western Isles for the calendar year 2003 could be between 917,301 and 1,292,361. The former figure indicates the maximum capacity if the available passenger space on ferries is calculated using the available space for cars on the loading deck multiplied by the capacity of an individual car.

7.4 Conclusion & Limitations

- The above information points toward a very large theoretical total for available passenger transport into the Western Isles. Table 7.6 shows that if every available seat on flights and ferries into the Isles was utilised it would be possible to transport 950,153 passengers into the Isles during the season from March – October 2003.

- Even when allowance is made for the fact that the realistic carrying capacity on the ferries is influenced by the space available for cars, the theoretical total number of visitors remains very high.
- This would appear to suggest that there is indeed plenty of capacity to satisfy both the yearly and the seasonal demand. However, it may still be the case that there are specific weeks, days, flights or sailings that experience full capacity and are unable to satisfy the demand of visitors wishing to travel to the Western Isles on these infrequent occasions.
- The capacity for cars and coaches indicates the volumes that may be transported if the loading deck is filled with either, exclusively. However, in reality there will be a mixture of freight, cars, coaches and caravans on each sailing that could significantly reduce the available capacity for cars and coaches.
- This could in turn affect the estimated passenger capacity calculated in table 7.4 and demonstrate a lower total passenger capacity. This may demonstrate that capacity is closer to the limit than the above figures suggest. However, from all the evidence available, we do not believe there was a significant transport imposed constraint on visitor numbers in 2002.
- It is easier to increase transport capacity than accommodation capacity. In the past, the transport providers have responded to unsatisfied demand by adding flights or sailings. While there may be a time lag between demand and supply, there is no evidence to suggest that supply and demand are seriously unbalanced at the present time.

8. ACCOMMODATION OCCUPANCY LEVELS 2002

8.1 DATA COLLECTION

Each year the Western Isles Tourist Board gathers data from its members with regard to their occupancy levels for both bedrooms and beds. Subsequently, Macpherson Research provides an Occupancy Survey Report (See Appendix 3) based on this data.

Although a credible sample of 98 providers submitted their 2002 occupancy data, the sample is inadequate to yield robust analysis by type or grade of accommodation at an individual island level.

To supplement the occupancy data and its analysis and to help explain the findings, a sample of accommodation providers together with the local TIC staff were interviewed to discuss some of the issues and trends in occupancy levels in the Western Isles. This provided a more complete picture of the trends and issues relating to accommodation occupancy and capacity.

In total we contacted 6 TIC staff and 27 accommodation providers.

8.2 Summary Occupancy Levels by Type & Month

Table 8.1 Accommodation Sample (Properties/establishments)

	Lewis	Harris	North Uist	South Uist	Benbecula	Barra	W.Isles
Hotel	3	2	0	1	0	0	6
Guest House	2	2	0	1	0	1	6
Bed & Breakfast	5	2	3	4	1	1	16
Self Catering	27	25	9	2	1	5	69
Caravan	0	0	0	2	0	2	4
Total	37	31	12	10	2	9	101

Source: WITB & Macpherson Research Occupancy Survey

Table 8.2 Western Isles Room/Unit Occupancy

	April	May	June	July	Aug	Sep	Oct
Hotel	36.1	65.3	73.6	76.7	75.7	54.3	31
Guest House	42.4	70.7	83.2	84.9	81.3	77.1	66
Bed & Breakfast	13.8	40.1	44.6	46.8	43.9	27.4	9.9
Self Catering	28.7	50.7	78.4	90.3	92.8	60.5	33.2
Caravan	12.5	18.8	65	100	100	50	25

Source: WITB & Macpherson Research Occupancy Survey

Table 8.3 Western Isles Bed Occupancy

	April	May	June	July	Aug	Sep	Oct
Hotel	23.8	48.4	56.7	59.2	55.2	37.1	20.9
Guest House	30.8	59.3	70.3	73.6	71.7	61.4	45.7
Bed & Breakfast	11	27.9	33.8	38.5	31	18	6.1

Source: WITB & Macpherson Research Occupancy Survey

Figure 8.1

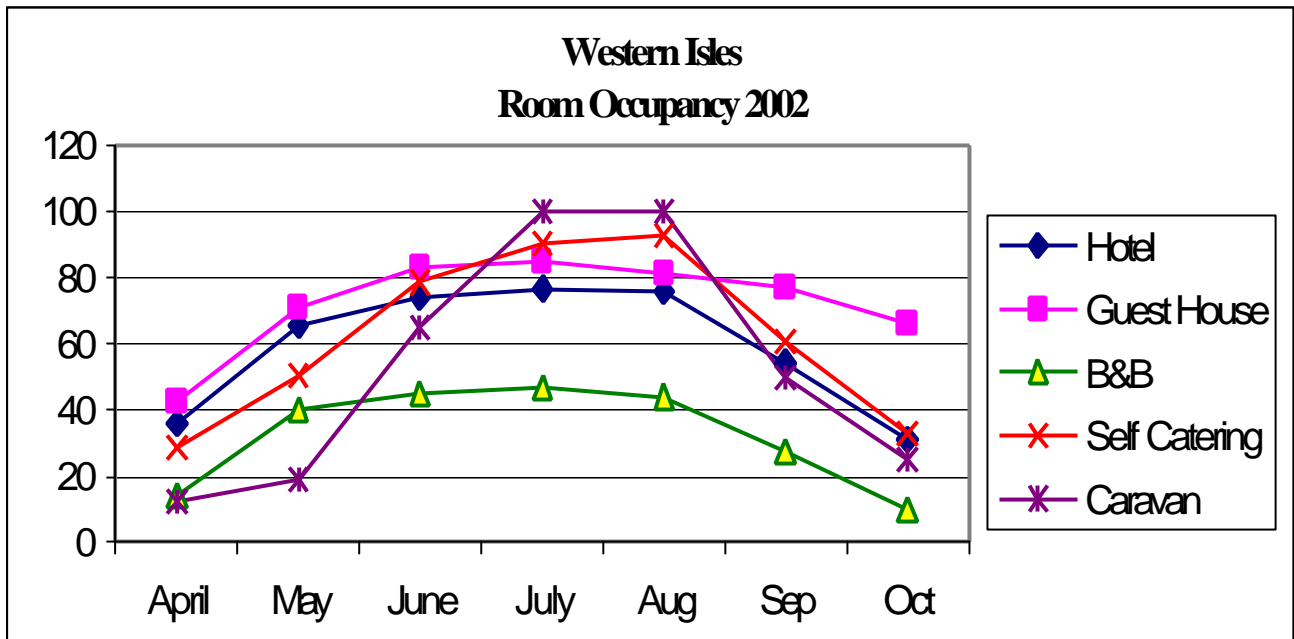
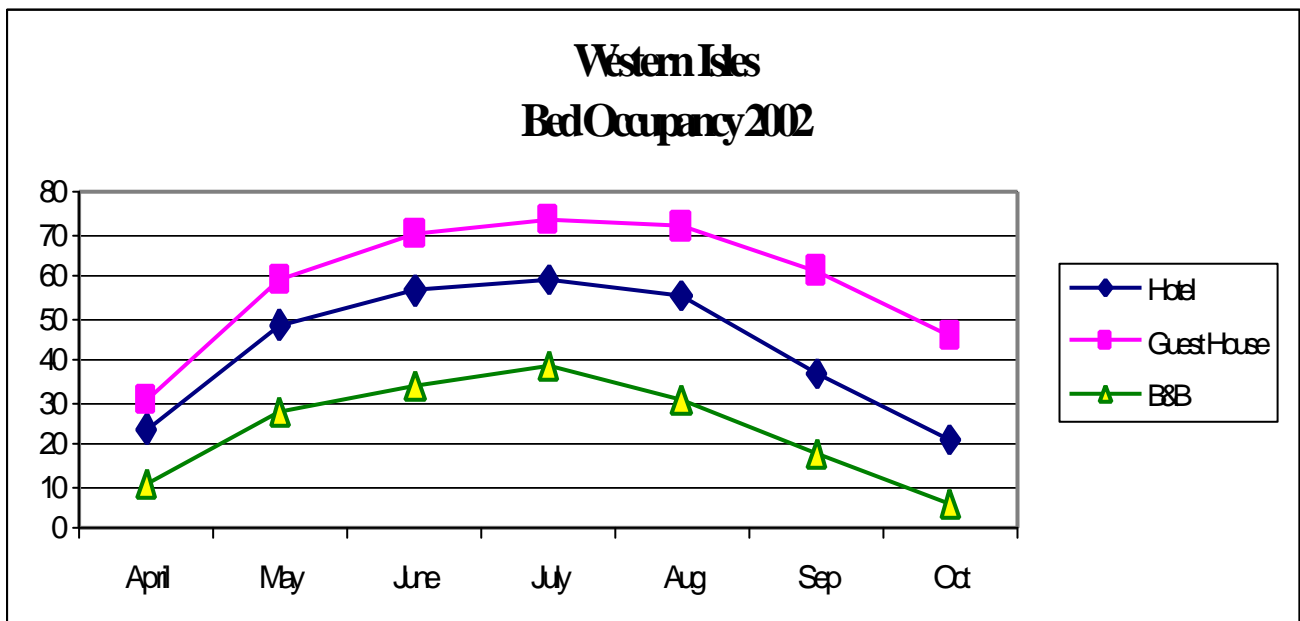


Figure 8.2



Comments

- The occupancy rates of Self Catering units in the Western Isles is very high. Out of the sample of 85 properties included in the survey, 79 were fully booked for July and August. However, during the shoulder months of the main season self catering units show a relatively low rate of occupancy compared to other types of accommodation. This is particularly the case at the beginning of the season in the months of April and May.
- The strength of demand for self catering units during the peak months is described in the next section. Both TIC staff and accommodation providers estimated the excess demand for self catering in July and August to be upward of 100%.
- Comparatively, Bed and Breakfasts have a significantly lower occupancy rate than other types of accommodation. Neither room nor bed occupancy reached 50% in the peak months, or indeed at any other time during the year.
- Guest Houses experienced the highest levels of occupancy compared to other serviced accommodation (Hotel, B&B) with room occupancy above 80% for June, July and August.
- There is a sizeable difference between room occupancy and bed occupancy across each type of accommodation. This is accounted for by double and twin rooms being occupied by only one person. This could suggest that there is insufficient provision of single rooms in the Western Isles.
- It would appear that overall there is sufficient accommodation capacity in the Western Isles to meet the demand from visitors, however these figures may be slightly misleading given that they hide a number of key issues:
 1. Demand for accommodation is significantly higher at arrival and departure points from the Western Isles. Therefore, there appear to be repeating accommodation constraints in these locations that are not reflected in the aggregate figures. The aggregate figures represent an average which includes more remote locations.
 2. Demand for accommodation is concentrated at certain times during the week, dependent on ferry and flight schedules. This means that there may be a large excess demand for accommodation midweek, but a vacuum at the weekend that causes the weekly average to suggest there is not an overall capacity constraint.
 3. The same may occur with regard to busy weeks such as Easter seeming to have a low occupancy level because genuinely low occupancy in the shoulder weeks brings the monthly average downward.

There would certainly seem to be a discrepancy between the occupancy level data and the perceived actual constraint on accommodation in the Western Isles. The issues that affect occupancy are varied and often only relate specifically to one, or a small group of accommodation providers. Some of the key issues that affect the provision of accommodation and occupancy levels highlighted by the providers are discussed in the section 8.5.

8.3 Occupancy Rates 1998 – 2002

Figure 8.3

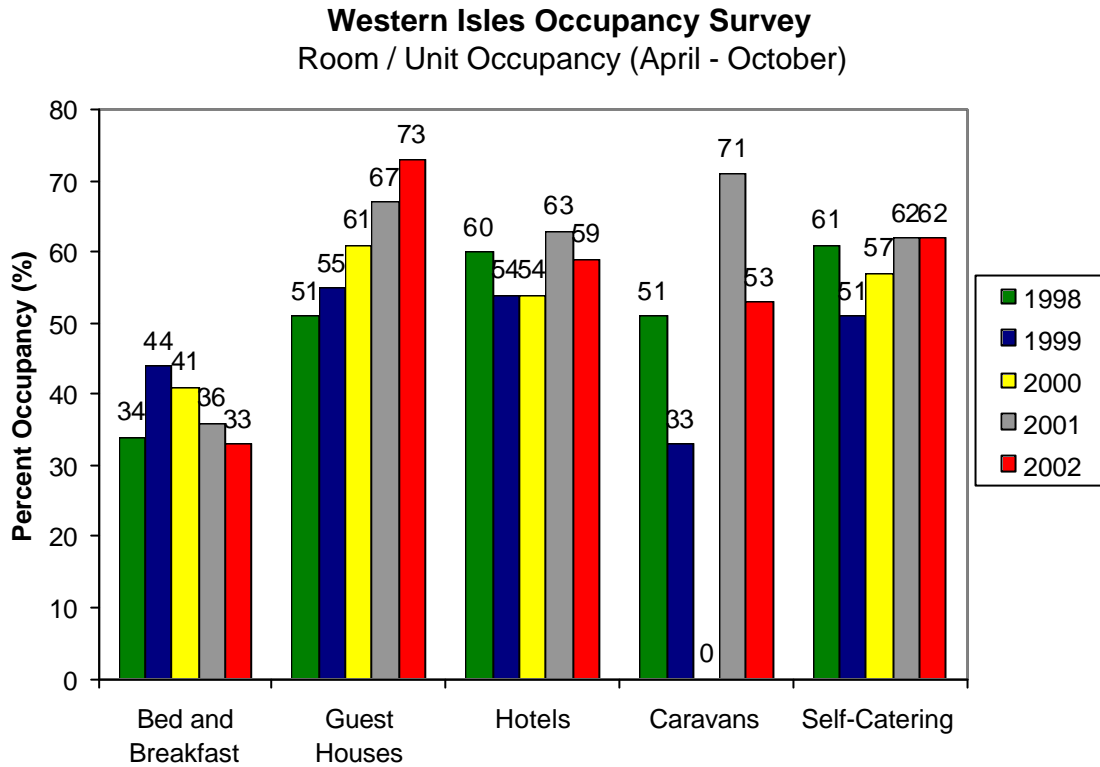
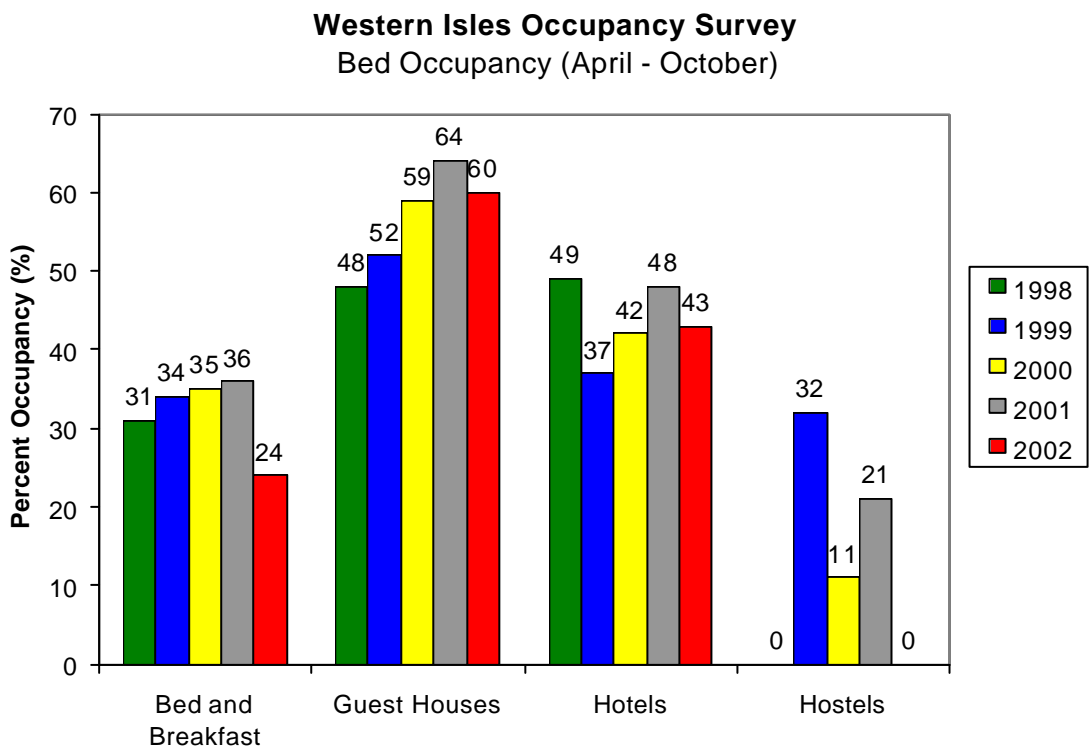


Figure 8.4



Comments

- Bed & Breakfasts in the Western Isles continue to experience a decline in the level of room occupancy between April and October. Since 1999 the occupancy rate has dropped 11%, from 44% to 33% in 2002.
- Conversely, the level of room occupancy for Guest Houses in the Western Isles between April and October has continued to grow. It has risen from 51% in 1998 to 73% in 2002.
- Hotel room occupancy dropped slightly between 2001 and 2002, but overall there has been no significant trend over the last 5 years since 1998.
- Similarly, there is no particularly significant trend in the occupancy rates of either caravans or self catering units. Indeed, there is no change in the occupancy level of self catering between 2001 and 2002. However, Caravan occupancy dropped by 18% from 71% in 2001 to 53% in 2002. It should be noted that the sample of caravans in the analysis is traditionally very small and the resulting analysis is not robust.
- Comparison between room occupancy and bed occupancy over the last few years reveals some interesting points. In guest houses and hotels, the gap between room occupancy and bed occupancy widened in 2002. This is due to an increase in single occupancy. In Bed and Breakfasts, the same is true in 2002 but this reverses the opposite trend over the previous few years.

8.4 **TIC & Accommodation Provider Interviews**

The TIC staff and accommodation providers were contacted by telephone and asked a series of questions relating to actual and perceived trends and issues relating to the provision of accommodation in their particular area and the island as a whole. Rather than using a formal questionnaire, the TIC staff and accommodation providers were engaged in an open dialogue in order to include the diversity of issues that they felt were important to their particular situation.

The following information is a truncated account of the salient points highlighted by the providers and TIC staff themselves. It does not necessarily reflect the opinion of Macpherson Research but it does provide many interesting and useful insights.

Key Points

- Occupancy levels in 2002 were similar to that of 2001, if not better. None of the providers claimed to have experienced a decline in demand.
- Season runs from April to October, inclusive.
- July & August constitute the busiest months with a peak of 2 or three weeks in the middle.
- Demand for accommodation is concentrated during weekdays, dropping sharply at the weekend.
- Average length of stay in each island has decreased. Visitors more inclined to 'island-hop'.
- Overall, accommodation is sufficient to meet demand. If it is spread thinner it may become economically unsustainable.
- There is a particular shortage of Self Catering units and some respondents also reported a lack of Bed & Breakfasts throughout the Western Isles.
- There is a large excess of demand for S/C units – 100+% during the busy months.
- Demand for accommodation is closely linked to the timetable of ferry crossings.
- Advanced bookings are increasing. Visitors recognise demand for accommodation.
- Visitors are placing greater emphasis on value and quality but not everyone is prepared to pay more.
- There was an increase in the number of Scottish visitors, and a decrease in American visitors.
- Some accommodation providers chose not to register with the WITB due to their dissatisfaction with the inspection process.

Lewis

Comments Provided by local Tourist Information Centre Staff:

- Identified the season as being from April through October, inclusive.
- Believed that the island has sufficient provision of accommodation to cope with the seasonal demand.
- Certain weeks of the season, especially during July and August or festival periods, put a strain on the islands accommodation.
- Stornoway is a 'bottle-neck', but can cope none the less. Demand is greatest at the beginning of the week, and least on Saturday. This is directly linked to ferry crossings between Stornoway and Ullapool, and the days when visitors seem to prefer to depart.
- Self-catering units book very quickly. The season (April-October) may be 75% booked by the end of April.
- There is a shortage of family rooms, especially in value accommodation

Comments from Accommodation Providers:

Hotel 1

- Hotel accommodation can be difficult to find on Tuesdays and Wednesdays from June to August. This midweek peak could be avoided if weekend transport links with the mainland were improved.
- Tour Operators are reluctant to visit Lewis at the weekend due to "awkward transport issues". This causes high demand for groups during the midweek, leaving little space for individuals.
- Providing additional hotel space in Stornoway may not generate any return on capital employed and could simply put existing bedroom stock in the town under further pressure at a time when occupancy is already too low, average room rates are too low, and retained earnings are marginal.
- The high demand midweek between June and August does not support a year round viable business.

Hotel 2

- Season runs from March through October, inclusive, and the last fortnight in December.
- Believes that there is not a shortage of accommodation on the island, but rather a shortage of what people are looking for: "Travel Inn style, economy quality".

Harris

Comments Provided by local Tourist Information Centre Staff:

- Provision of accommodation is adequate, and quality is fantastic.
- Accommodation could be improved with better hotel provision for Coach tours, and more Bed & Breakfasts in Tarbert.
- There were two days in August during which the TIC was unable to provide any accommodation in the island of Harris, and had to send visitors north to Lewis.
- There is a 'bottle-neck' of demand for accommodation at all of the Western Isles ferry ports, but not the hinterland.
- The length of stay on the island has been shortening, especially since the establishment of the Leverburgh ferry. Visitors are more inclined to 'island-hop'.

Comments Provided by Accommodation Providers:

Hotel

- 2002 was a good season. It ran slightly longer into the winter. The busiest months were July to September, inclusive.
- Both July and August were completely full – there were no free rooms.
- They are turning people away every week during the summer season.
- Growing number of e-mail enquiries requesting bookings.
- Harris normally has just enough accommodation to meet the seasonal demand.
- The length of stay has reduced as people are inclined to try and see as much of the islands as possible, in as short a time as possible.
- The problem is not the provision of accommodation, but rather trying to match the demand from visitors and the supply from local providers.

North Uist

Comments Provided by local Tourist Information Centre Staff:

Declined to comment.

Comments Provided by Accommodation Providers:

Hotel

- 2002 was 'not bad': started earlier and finished earlier – May to September, inclusive. The busiest months were from the end of May to the end of August. Poor fishing caused September to be quieter than was expected.
- During the busy months they are at maximum capacity, and are turning people away on a daily basis. Frequently they are asked why there is 'nowhere to stay?'
- There is an excess of demand for accommodation in North Uist, especially Lochmaddy. People turn up in the evening for the 7a.m. ferry to discover there is only one hotel and one Bed and Breakfast. Many end up sleeping in their cars.

Guest House

- 2002 was a better year than 2001 – no 'foot and mouth', and more favourable ferry times and frequency of crossing. The season runs from May to October, with July and August being the busiest months.
- During July and August they are full most nights, and are having to turn people away almost everyday.
- There is a large excess of demand for accommodation during the summer season. On a whole the accommodation provision is not sufficient, but is not to sure whether they can justify expanding accommodation for such a short season. They are yet to hear of someone ultimately failing to find accommodation.
- The shortage of accommodation is mostly with regard to Bed and Breakfasts.
- They are busier from Tuesday to Friday, and the lack of a Sunday sailing during the winter reduces the possibility of 'weekend breaks'.
- Bed occupancy figures are hampered by double or twin rooms being taken up by single occupants.

Bed and Breakfast

- 2002 was a good year – similar to previous. The busiest months are from May to August, inclusive.
- During the busy months they have 75% capacity most nights.
- They are turning people away every week during the season, from both passing visitors and advance bookings.

Bed & Breakfast

- 2002 was a good season – much the same as the year before. The season runs from March to October, with the busiest months being March, May, August and September.

- They are full most of the time during the busiest months, turning people away in ‘feasts and famines’.
- There is an occasional excess of demand.
- 2001 saw the largest number of advanced bookings to date, yet there was another big increase in this trend for 2002.
- There is a limit to the number of visitors the ferry and planes can bring in to the island, and high fares act as a deterrent.
- The accommodation provision is adequate, and if it spreads any thinner, it will not be economically viable. Especially considering the cost of registering with the WITB – it would be difficult to make your money back.

Self Catering

- 2002 was just the same as 2001 – ‘fairly good’
- They had no bookings in April, and a couple of blanks in the months of May to October 2002.
- They are full for next summer already (as of December 2002), with the exception of two weeks in June and one in July.
- During the peak season there is high levels of excess demand – at least 100%
- Overall there has been an increase in demand for Self Catering units. Demand has also increased for high quality accommodation. There is a small, expensive hotel that does very well because of its emphasis on quality.
- Accommodation providers are affected by the short season.
- Some accommodation providers became disillusioned with the WITB’s approach to property inspection, and subsequently did not renew membership.
- There are two unregistered Self Catering units, and their occupancy rate is just as high as the registered units. This is possibly due to the effectiveness of their web based approach.

Outdoor Centre

- 2002 was a good year. It was progressively busier.
- The season runs from the end of April through September.
- Relies heavily on advance bookings, most of which are lodged by the beginning of the season.
- Occasionally turn people away over the course of the season.
- Web advertising, and subsequent booking has aided increase in demand.

Benbecula

Comments Provided by Accommodation Providers:

Hotel

- Demand for accommodation is concentrated on Mondays and Tuesdays during the peak season. This is primarily due to the schedule of ferry crossings.
- Overall there is enough accommodation on the island to match demand.
- The cost of getting to and from the island is a constraint and deterrent with regard to accommodation.

Bed & Breakfast

- 2002 was busier than 2001. The season ran from March to August, with the busiest months being May to August, inclusive.
- During the busy months they were turning away as many as eight couples per week. However, the demand appears in 'fits and starts', and there is no particular bias with regard to weekdays or weekends.
- The island could benefit from extra bed space, particularly with regard to Bed & Breakfasts.
- Unregistered accommodation occupancy is similar to that of registered. Some registered providers recommend unregistered if they are full.

Self Catering

- 2002 season was not quite as busy as 2001. The busy period is from April to August, inclusive. During this time they were full, with the exception of one week in July.
- Excess demand of at least 100% in July and August.
- Visitors start booking in December, and most of the season is booked by the beginning of April.

Camping & Caravan

- There was an increase in demand in 2002, particularly from Scottish visitors. The busiest months were July and August.
- Static Caravans were fully booked from May to September.
- Overall, there is plenty of accommodation on the island.

South Uist

Comments Provided by local Tourist Information Centre Staff:

- 2002 was a good season, better than the previous year. July is the busiest month due to the Uist Music Festival.
- During the busiest months accommodation reaches capacity, and they have to rely on unregistered stock to satisfy the excess demand.
- There is a particular shortage of self catering units during March to October – excess of demand in the region of 100%.
- Some of the accommodation providers object to the WITB's methods of inspection and rating.

Providers:

A) Hotel

- 2002 was a good season, roughly the same as 2001: less Americans, more Scottish
- The season runs from March to September and is busiest during the end of May and beginning of June, and the first week in July (festival). This year was also kept busy until December with business demand.
- Block bookings disrupt occupancy rates e.g. if a tour group books 5/7 days the remainder 2 shoulder days will be virtually empty.
- There is a definite difference between perceived and actual levels of capacity.
- 2-5% of bookings were taken on-line, and this figure is increasing.
- Advertising in the Caledonian MacBrayne brochure helped increase bookings.

C) Bed & Breakfast

- 2002 was a better year than 2001 – 'no foot and mouth'. The season ran from April to September, with July and August being the busiest months.
- People are staying for longer – 3-4 nights.
- They would increase their occupancy rate if they had more single rooms.
- People are becoming more aware of the need to book in advance due to the increase in demand.

D) Bed & Breakfast

- 2002 was a better year than 2001. The season ran from April to October, inclusive, with May and July as the busiest months.
- There is enough demand to warrant the expansion of accommodation provision. In particular, there is a shortage of Bed & Breakfasts and Self Catering providers.
- The number of visitors from Scotland has increased.
- The demand is concentrated midweek due to the ferry timetable.

Barra**TIC:**

- There is a definite shortage of accommodation on the island.
- Self Catering is usually fully booked by the start of the season.
- Hotels and Bed & Breakfast are both stretched by the demand during the season.

Comments Provided by Accommodation Providers:**Hotel 1**

- 2002 was a good season. The season runs from March to September, inclusive, with June being the busiest month due to the local flora and bird life.
- The demand from private guests has increased, whilst the number of coach tours has decreased.
- The new ferry service from Barra to South Uist will make a significant difference, enabling more coaches to visit more frequently..

Hotel 2

- 2002 was much the same as 2001, with May to June being the busiest period.
- There is an overall decline in tourism manifesting in pockets of emptiness.
- Self Catering units have increased in line with their demand. Some people have even chosen to let their own houses for the summer months to take advantage of the excess demand.
- The demand for accommodation is concentrated in certain times of the week depending on the timetable of the ferry.
- Overall, people are staying for shorter periods of time.

Self Catering

- Fully booked June to August
- The demand for Self Catering accommodation is still there despite the increase in the number of providers.
- Barra could benefit from more Self Catering and Bed & Breakfast providers.
- More people would visit Barra if there was a caravan site.
The number of providers registered with the WITB has dropped by 25% over the last 5 years. This is largely attributable to provider's reaction to the methods of inspection.

9. AVAILABLE ACCOMMODATION CAPACITY 2003

Using information supplied by the WITB with regard to registered accommodation, and estimates from local Tourist Information Centre staff and local providers, it was possible to estimate figures demonstrating the total provision of accommodation in the Western Isles. For a more detailed report of accommodation by island or type, see Appendix 2.

9.1 DATA COLLECTION

Registered Accommodation:

The Western Isles Tourist Board supplied a copy of their Membership Analysis 2002. This included an island by island report of the number of Providers and Bedrooms in each accommodation category. To provide a forecast for 2003 accommodation that included the availability of bed space and a report on star ratings, it was necessary to supplement the WITB data with information from their 2003 Accommodation Brochure.

Unregistered Accommodation:

In order to estimate the total provision of accommodation in the Western Isles it was necessary to evaluate the volume of unregistered providers in the islands. This was done in two ways. Firstly, the local Tourist Information Centre staff were contacted and asked for an estimate of the number of unregistered providers in their specific area, including where possible the number of rooms and beds. Secondly, several of the local providers of accommodation were contacted (both registered and unregistered) and asked to make the same estimate. The figures that are used in the remainder of this section reflect the information provided by both of these sources.

A total of 6 TIC staff members and 27 accommodation providers were interviewed.

9.2 Western Isles Total Accommodation

Table 9.1 Western Isles Total Accommodation
(WITB registered & unregistered)

	Hotel	Guest	B&B	S/C	Hostel	Total
Providers	20	23	127	204	14	388
Rooms	404	136	324	514	33	1,411
Beds	722	248	649	1,149	269	3,037

Source: WITB Membership Analysis data & WITB Accommodation Brochure 2003

Table 9.2 % Total Accommodation Unregistered

	Hotel	Guest	B&B	S/C	Hostel	Total
Providers	15.0	13.0	20.5	10.3	7.1	13.9
Rooms	11.1	13.2	19.8	9.7	6.1	12.7
Beds	9.4	12.1	19.3	9.4	5.2	11.4

Source: WITB Membership Analysis data & WITB Accommodation Brochure 2003

- Out of 388 providers of accommodation in the Western Isles, 13.9% choose not to register with the WITB. This equates to 54 unregistered providers.
- Bed & Breakfast providers make up the largest proportional group of unregistered accommodation with 20.5% of them choosing not to register with the WITB.

Table 9.3 Western Isles – Registered Accommodation Star Ratings

	1 Star	2 Star	3 Star	4 Star	5 Star	Pending	Total
Providers	21	72	133	61	2	45	334
Rooms	55	339	540	175	5	118	1,232
Beds	231	659	1,078	413	10	301	2,692

Source: WITB Membership Analysis data & WITB Accommodation Brochure 2003

- The Western Isles has a relative abundance of 3 Star accommodation. As a group of accommodation providers it accounts for 40% of WITB registered accommodation. Conversely, there are only 2 providers of 5 Star accommodation, both of which are Self Catering, providing a total of 5 bedrooms and 10 beds.

Figure 9.1

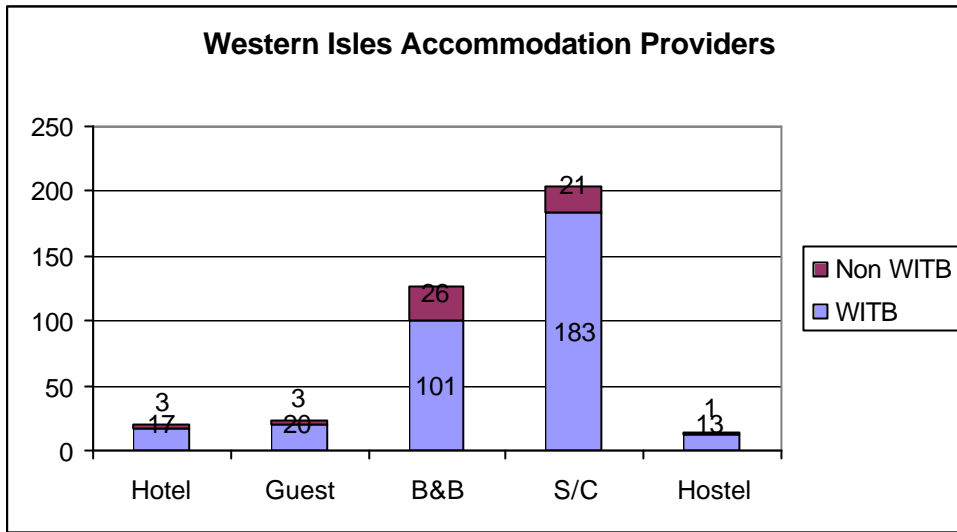
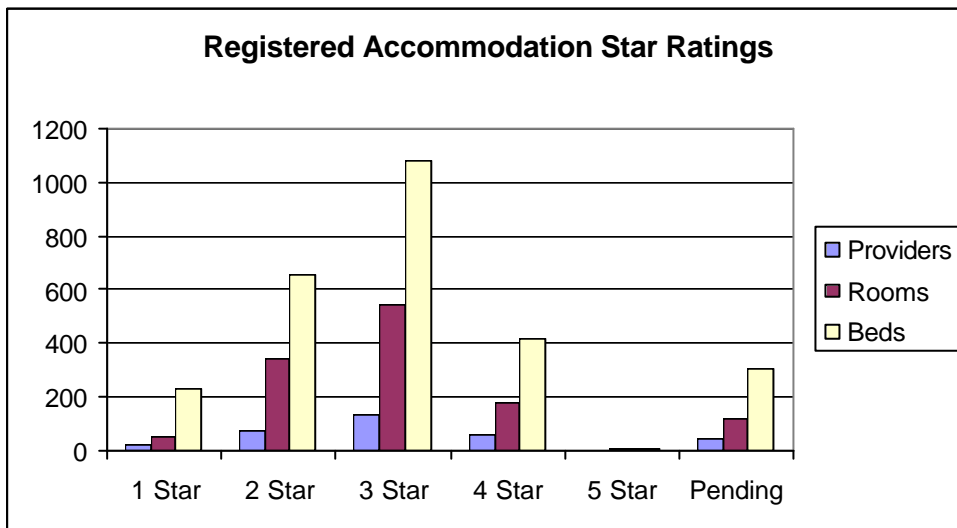


Figure 9.2



9.3 Accommodation Providers, Bedrooms & Bed Space Island by Island

Table 9.4 Accommodation Providers Island by Island

Providers	Hotel	Guest	B&B	S/C	Hostel	Total
Lewis	7	13	43	76	4	143
Harris	2	5	28	56	5	96
North Uist	3	1	14	23	3	44
Benbecula	2	1	8	6	0	17
South Uist	3	2	19	25	1	50
Barra	3	1	15	18	1	38
W. Isles	20	23	127	204	14	388

Source: WITB Membership Analysis data & WITB Accommodation Brochure 2003

Figure 9.3

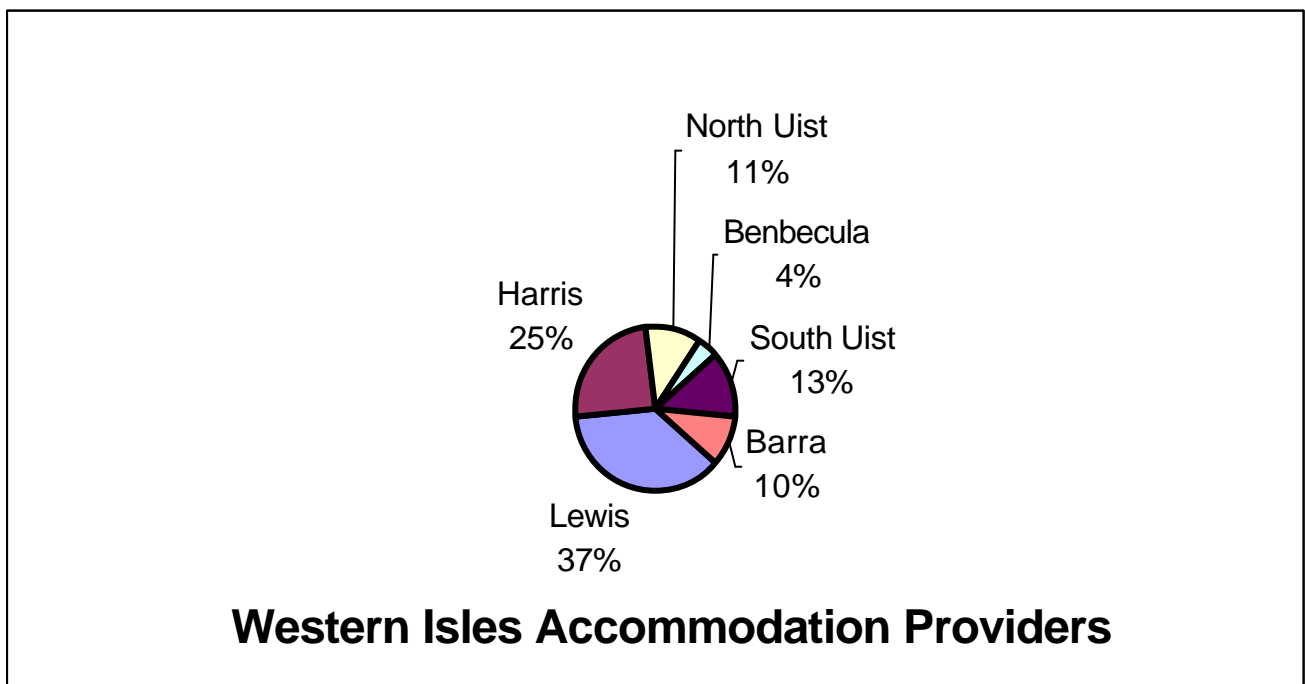


Table 9.5 Volume of Bedrooms Island by Island

Bedrooms	Hotel	Guest	B&B	S/C	Hostel	Total
Lewis	196	74	109	204	20	603
Harris	29	30	69	142	6	276
North Uist	31	8	36	54	7	136
Benbecula	58	4	19	18	0	99
South Uist	41	17	52	55	0	165
Barra	49	3	39	41	0	132
W. Isles	404	136	324	514	33	1,411

Source: WITB Membership Analysis data & WITB Accommodation Brochure 2003

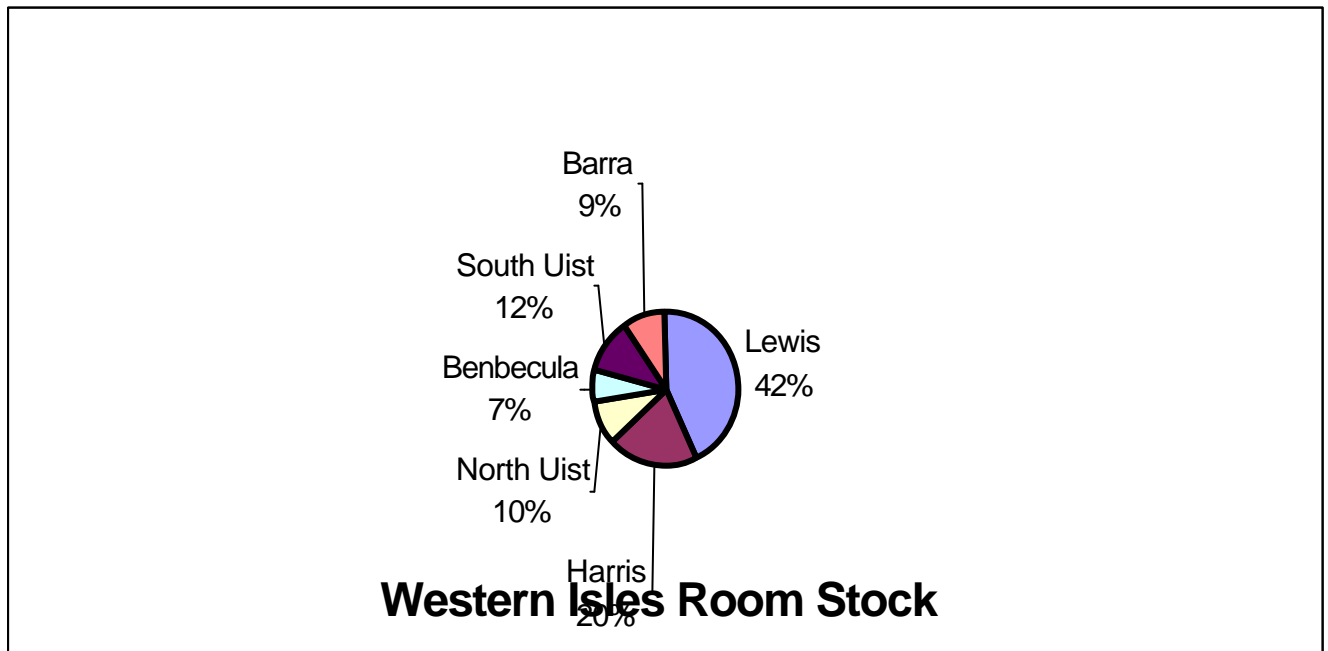
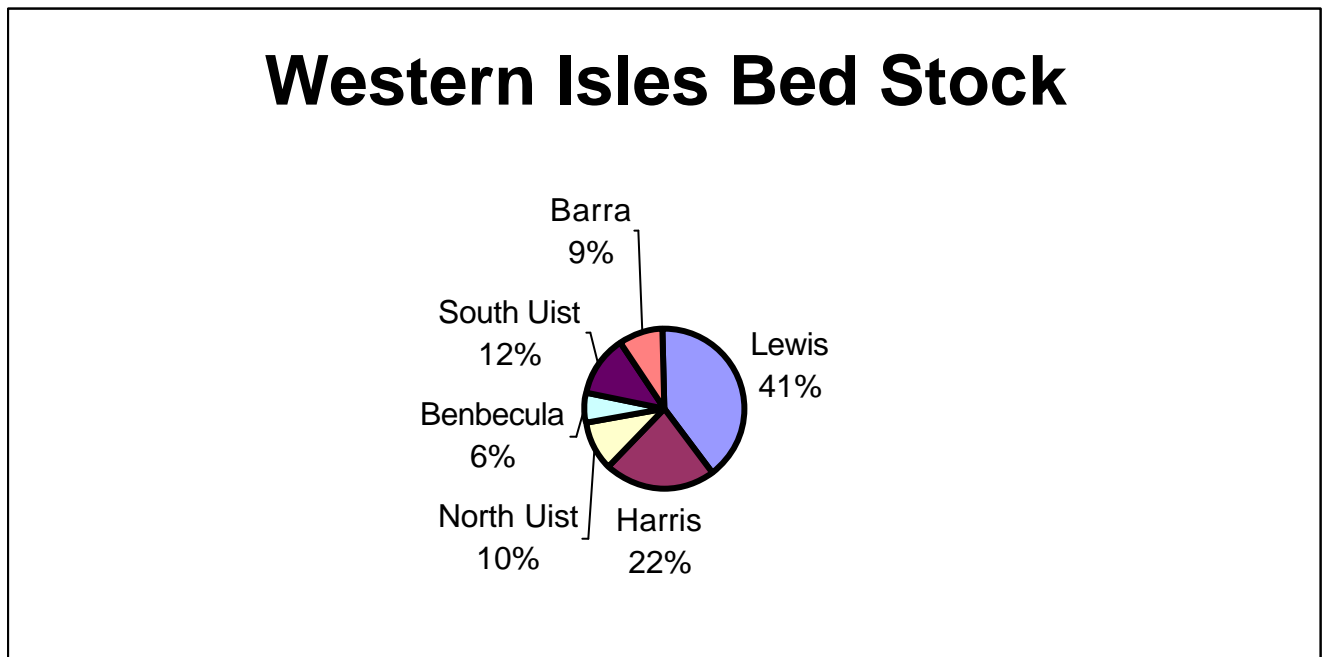
Figure 9.4

Table 9.6 **Volume of Beds Island by Island**

Beds	Hotel	Guest	B&B	S/C	Hostel	Total
Lewis	334	131	221	438	80	1,204
Harris	58	50	141	317	103	669
North Uist	48	18	70	123	50	309
Benbecula	103	8	38	41	0	190
South Uist	78	34	104	141	20	377
Barra	101	7	75	89	16	288
W. Isles	722	248	649	1149	269	3,037

Source: WITB Membership Analysis data & WITB Accommodation Brochure 2003

Figure 9.5

APPENDIX 1

Transport Tabulations

APPENDIX 2

Accommodation Data

APPENDIX 3

Occupancy Survey Data