



OUTER HEBRIDES TOURISM – VISITOR DATA PROJECT

Report by Chief Officer, Economic & Community Regeneration

PURPOSE

- 1.1 The purpose of the report is to consider a presentation from Outer Hebrides Tourism (OHT) on the findings of a recent Outer Hebrides visitor data project.

EXECUTIVE SUMMARY

- 2.1 Outer Hebrides Tourism (OHT) is the official Destination Management Organisation (DMO) for the Outer Hebrides, representing over 400 tourism-related businesses across the islands. It is a Community Interest Company and is reliant on membership income and project-based funding to sustain its activities. OHT plays a central role in supporting the tourism sector through business development, destination marketing, and strategic advocacy on behalf of its members.
- 2.2 Recognising a lack of up-to-date visitor data for the Outer Hebrides since the last formal survey in 2017, and the significantly changed tourism landscape in that period, OHT secured funding through the CLLD programme to undertake a collaborative research project with Edinburgh Napier University. The project has sought to establish a refreshed, sustainable methodology for the collection and analysis of tourism data in the Outer Hebrides, with specific focus on understanding the current position of the islands' visitor industry and informing future planning and investment.
- 2.3 This work has been supported by Comhairle nan Eilean Siar's Economic Development service through local engagement and data gathering.
- 2.4 The project explores how data from various existing sources can be pooled and enhanced with new insight, including emerging trends such as cruise tourism, short-term lets, and community-led visitor experiences. The goal is to develop a cost-effective, replicable model for tourism data collection in the islands.
- 2.5 The findings are anticipated to highlight the current relevance of tourism to the islands' economy and provide an updated evidence base to inform future destination planning and tourism investment decisions. OHT will deliver a presentation on the project findings at the September 2025 meeting of the Sustainable Development Committee.

RECOMMENDATIONS

- 3.1 **It is recommended that the Comhairle notes the presentation from Outer Hebrides Tourism on the findings of its visitor data project.**

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IMPLICATIONS

- 4.1 The following implications are applicable in terms of the Report.

Resource Implications	Implications/None
Financial	None
Legal	None
Staffing	None
Assets and Property	None
Strategic Implications	Implications/None
Risk	None
Equalities	None
Corporate Strategy	Supports the Corporate Strategy 2022–2027 ambition to strengthen the local economy
Environmental Impact	None
Consultation	OHT, Edinburgh Napier University, Comhairle Economic Development

BACKGROUND

- 5.1 The most recent Outer Hebrides Visitor Survey was carried out in 2017, with previous surveys taking place in 2012 and 2014. These studies were supported by VisitScotland and the Comhairle and provided high quality baseline information based on structured entry point interviews and follow-ups. Since then, no comprehensive, island wide data collection has been undertaken.
- 5.2 In the absence of recent data and in a changing tourism landscape, Outer Hebrides Tourism (OHT) identified the need for a modernised and sustainable approach to visitor intelligence. With support from CLLD funding, OHT commissioned a collaborative project with Edinburgh Napier University. The research also builds on relevant datasets and findings collated as part of the Comhairle's 2024 Tourism Levy pre-consultation, including insights gathered by external consultants on visitor profiles, behaviours and economic impact.

DETAIL

- 6.1 The research project has been designed to respond to current challenges in the tourism sector including limited access to updated data, changes in visitor behaviours, and emerging forms of tourism such as short-term lets and cruise activity. It also aims to replace the previous high-cost, infrequent survey model with a more efficient and repeatable system.
- 6.2 Existing datasets, including CalMac and Loganair statistics, accommodation occupancy data, national tourism trends (such as STEAM), and local financial indicators have been aligned and analysed to identify patterns in visitor numbers, seasonality, and economic impact. The project also explored how external factors such as weather and post-Covid economic conditions are influencing visitor activity.
- 6.3 The final report, due for completion ahead of the September Committee meeting, will provide:
- An accurate picture of current visitor volume, spend, and activity across the Outer Hebrides.
 - Trends analysis using historical and current data.
 - Forward looking projections to support policy and project planning.
 - Recommendations for a practical, repeatable visitor survey model
- 6.4 OHT will deliver a presentation on the project findings at the September 2025 meeting of the Sustainable Development Committee.

CONCLUSION

- 7.1 Tourism is recognised as a key sector for the islands within the Outer Hebrides Economic Strategy 2025-35. The findings of the research project are anticipated to highlight the ongoing contribution of tourism to the islands' economy and provide a robust and updated evidence base to inform future destination planning and tourism investment decisions. Comhairle Officers will continue to engage with this initiative to ensure that support to the tourism sector remains informed, resilient, and evidence led.