

Scottish Natural Heritage

Commissioned Report 353

Nature Based Tourism in the Outer Hebrides



COMMISSIONED REPORT

Commissioned Report No. 353

Nature Based Tourism in the Outer Hebrides

(Tender 29007)

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COMMISSIONED REPORT

Summary

Nature Based Tourism in the Outer Hebrides

Commissioned Report No. 353 (*Tender 29007*)

Contractor: Taylor, W.A., Bryden, D.B., Westbrook, S.R. and Anderson, S.

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Background

Tourism in the Outer Hebrides is a significant contributor to the economy of the islands. Much of this is based on the outstanding wildlife, landscape and opportunities for activity in the outdoors that are available throughout the year. The Area Tourism Partnership consisting of Comhairle nan Eilean Siar, HIE, VisitScotland, Scottish Natural Heritage and the Island's tourism businesses recognise that the contribution that these assets can make to the island's economy can be increased.

This study undertook a review of the nature based assets within the Outer Hebrides and identified those assets that offered the greatest potential to help grow the island's economy. In particular, the report identifies opportunities to address the imbalance between peak season visitors to the area and visitors at other times of the year.

Main Findings

The report identifies the following as priority issues to be addressed by the Area Tourism Partnership to maximise the contribution nature based tourism makes to the economy of the Outer Hebrides:

- Increase shoulder month occupancy rates to the Scottish average;
- Make the VisitHebrides website a more outward facing portal, through appointing a specialist in tourism Web 2 applications;
- Focus on key nature based assets that offer the most potential to support tourism growth;
- Encourage businesses to work in partnership to take recommended opportunities forward.

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1 INTRODUCTION

"It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change."

Charles Darwin

1.1 Report remit

Scottish Natural Heritage commissioned this study into the range of natural heritage assets in the Outer Hebrides, potential marketing and promotion, and suggestions for sustainable business opportunities related to nature based tourism in the area. The report will be used to develop an action plan which will complement the Outer Hebrides Area Tourism Partnership Plan. The study's remit included the following six tasks:

- Analyse current information on visitor numbers and attitudes, backed up by discussion with key individuals and organisations.
- Audit natural heritage assets and attractions, highlighting those that offer most potential for marketing to a wider audience and considering complementarity with existing cultural attractions.
- Review existing and planned services and assess the demand for new services. Consider how these might complement existing and future environmental designations.
- Identify gaps in information provision, access, services and facilities as well as recommending priorities for developing nature based tourism in a sustainable manner.
- Assess proposed developments in terms of their economic benefits and in relation to market demand. Potential partnerships should be identified.
- Make recommendations for improving the marketing of the natural environment of the Outer Hebrides.

1.2 Report structure

The methodology used in the report is set out in Section 2 and the study's findings in Section 3.

1.3 A vision for nature-based tourism in the Outer Hebrides

Scottish Natural Heritage (SNH) initiated this study with the support of Comhairle nan Eilean Siar (CnES), Highlands and Islands Enterprise (HIE) and VisitScotland. It is envisaged that the outputs of the study will complement the Outer Hebrides Area Tourism Partnership Plan. The Outer Hebrides has an outstanding asset in its

environmental resource as a foundation for nature based tourism, but there is a strong view that the asset is not being utilised or promoted as effectively as it could be.

Many visitors come to the islands without clear guidance on the range of opportunities available to them. They often have a general interest in the natural environment but they end up just exploring and 'stumble across hidden gems' rather than knowing what to look for (pers comm D MacLennan SNH). This study considered how some of these environmental secrets could be brought to the visitor's attention to give them a better experience during their visit than at present.

The following vision has been drawn up for nature-based tourism in the Outer Hebrides.

"To maximise the benefits that the outstanding natural attributes of the Outer Hebrides are able to bring to the tourism economy. This includes the rocks, landforms and landscapes; the flora and fauna both marine and terrestrial, and the opportunity to enjoy and appreciate these attributes through activity and the consumption of natural products in a sustainable way."

1.4 Definitions

The following definitions have been used in the report:

Nature Based Tourism	Leisure trips, largely or entirely undertaken to experience and enjoy nature in ways which support sustainable practice. The scope of the study includes all activities associated with the natural environment eg walking, climbing, kayaking, sailing, surfing etc; less active pursuits such as sightseeing, leisure driving, cruising holidays, photography; other activities such as arts and crafts where these are directly based on nature, and finally natural food from the area.
Tourist	A tourist is a person travelling away from home to stay at least one night for leisure purposes (MacCannell, 1976).
A tourist trip	A stay of one or more nights away from home for holidays, visits to friends or relatives, business/conference trips or any other purposes except such activities as boarding education or semi-permanent employment (VisitScotland Research, 2009).
Tourist expenditure	Spending incurred while away from home on a tourist trip and on advance payments for such items as fares and accommodation. For overseas visitors, the cost of travel to the UK is excluded (VisitScotland Research, 2009).
Natural Heritage	The wildlife, the habitats and the landscapes which have evolved in Scotland through the long partnership between people and nature. (SNH website, 2009)

Notes:

1. As this report is not a business audit, we cannot guarantee that all nature-based tourism operators in the Outer Hebrides observe sustainable practice.
2. Some leisure visitors to the Outer Hebrides are day-trippers, and some of these will take advantage of the area's natural heritage assets.

1.5 Overview of tourism in Scotland

The Scottish Government's Economic Strategy places emphasis on six specific industry sectors: life sciences, energy, creative industries, financial and business services, food and drink and tourism, as well as the technologies that support or "enable" their development.

Tourism makes a significant contribution to Scotland's economic prosperity. The industry's goal (Scottish Executive, 2006) is to grow tourism revenue by 50% by 2015 (from a 2005 baseline) by developing distinctive visitor experiences that capitalise on Scotland's tremendous tourism assets.

In 2008 (VisitScotland, 2008), around 15 million tourists made overnight trips to Scotland, and their annual spend was over £4 billion. Overseas visitors account for 17% of tourism trips to Scotland. The UK is Scotland's largest market and accounts for 83% of visitors. They provide 67% of total tourism expenditure in Scotland. In 2008, Scottish tourism supported 218,200 jobs (9.2% of the Scottish total). Tourism contributes Gross Value Added of 5% to the Scottish economy, and accounts for 11% of the Scottish service sector economy (compared to 9% for the UK as a whole).

1.6 Overview of nature based tourism in Scotland

Nature based tourism can take many forms, ranging from the passive (enjoying a view, painting) to the active (sea kayaking, mountain biking) and from consumption (fishing, stalking) to non-consumption (walking, bird-watching). Scotland's natural heritage gives it a strong competitive advantage. Its key role in Scottish tourism is demonstrated by surveys showing that 92% of visitors cite scenery and 65% quote nature and wildlife as important or very important factor when choosing Scotland as a holiday destination (Harris Interactive, 2008). Scotland was ranked as Europe's top eco-destination and ninth worldwide by a poll of 60,000 consumers in 2005 (www.travelmole.com).

The natural heritage also provides the setting for outdoor activities undertaken by visitors. The Scottish countryside has long been used for fieldsports, and fishing is still carried out by 4% of UK visitors. Walking is the most popular outdoor activity, with 47% of UK visitors in 2008 and 77% of day-trippers in 2007 undertaking some form of hill walking/ low level rambling during their trip. Adventure activity tourists utilise the natural heritage on land and water (4% of UK visitors), and wildlife watching (9% of UK visitors – including zoo parks) increasingly features on visitors' itineraries. Locally produced food and drink (including game and seafood) direct from the natural environment plays an increasingly important role in attracting visitor spend. Visitors will also spend money on art and craftwork inspired by the natural heritage.

Two parallel current research studies are relevant to this sector and this report.

- The Economic Impact of Scotland's Natural Heritage to Tourism, commissioned by SNH to determine the role that the natural heritage plays in Scottish tourism and also its economic impact. The report will be used to foster further sustainable development of Scottish tourism and will inform SNH's future involvement in tourism projects and activities. This work is being undertaken by much the same consortium that produced this report, but led by Duncan Bryden. This work is due to be completed around the same time as this Outer Hebrides study.
- A study of the economic impact of wildlife tourism in Scotland commissioned by the Enterprise, Energy and Tourism Directorate of the Scottish Government from the International Centre for Tourism and Hospitality Research (ICTHR), Bournemouth University. The Government recognises that wildlife tourism makes a valuable and growing contribution to Scottish tourism, and thus to sustainable economic growth. Various studies have been undertaken in the past to assess the impact of particular aspects of wildlife tourism. The findings from the majority of these studies are however now out of date and in general are also limited by geography or species.

The ICTHR study is designed to fill this gap in the evidence base and thereby inform tourism policy. Separate impacts will be estimated for terrestrial and marine-based wildlife tourism, with a focus on individuals who make a conscious decision to go to a place because of the opportunity to see wildlife.

1.7 Historical changes

The natural heritage has always played a role in Scottish tourism, going back many decades. Rural tourism began as the preserve of social elites who engaged in hunting. The urban working and middle classes first visited the seaside and mountains using the developing railway network in the late 19th and early 20th century. The post war period ushered in the modern car-borne mass recreation still prevalent today.

In the past the countryside was primarily seen as a working environment producing primary products such as food, fibre, minerals and energy. However, the contribution of rural 'public goods' such as scenery, biodiversity and wildness to the tourism experience are now much more widely acknowledged. The value placed on these public goods by society has prompted changes in policy and to publicly funded support to land managers.

SNH's Information and Advisory Note Number 143 (Hall, undated) quotes earlier research indicating that '*The contribution of visitor expenditure to the economy as a result of the natural heritage far outweighs spending on its care*'. It also quotes figures which suggest that Scottish residents are spending more time on day trips to the countryside. Outdoor recreation trips by Scottish adults to the coast or countryside increased from 105 million in 1994 to 137 million in 1998. Using a different methodology, a later study suggests there were an estimated 337 million visits in 2007 (TNS, 2009).

Changes can be felt most acutely in remote rural areas like the Outer Hebrides, reliant on agricultural subsidies for primary production. Stocking numbers have dropped by 50% or more in some island and hill locations. At the same time, payments for habitat and species management have increased, in part recognising the role of these in Scotland's tourism economy.

2 NATURE BASED TOURISM – ASSETS AND THEIR USE

The first part of this report is a review of existing information on the supply and demand for nature-based tourism in the Outer Hebrides. This leads on to an assessment of key opportunities, taking account of existing proposals. An assessment is made of the economic benefits that such opportunities might bring to the islands. Finally, recommendations are made on how the current marketing of the Outer Hebrides might be improved to realise these opportunities.

2.1 Overview of tourism in the Outer Hebrides

Tourism is now recognised as a key economic activity within the Outer Hebrides. The Outer Hebrides Area Tourism Partnership Plan for 2009-2015 identifies this importance and the sector's strategic fit with regional and national economic development policy.

The Outer Hebrides Community Planning Partnership has identified Tourism as one of the six inter-related economic drivers (OHCPP, undated), while the Single Outcome Agreement between the Scottish Government and the Community Planning Partnership (OHCPP, 2009) includes the following:

Local Outcomes

Local Outcome 1 **The populations of the islands of the Outer Hebrides are stable, with a better balance of age, gender and socio-economic groups**

Local Outcome 2 **The economy of the Outer Hebrides and the economies within the Outer Hebrides are thriving**

Local Outcome 5 **The communities of the Outer Hebrides are stronger and more able to identify, articulate and take action and responsibility regarding their needs and aspirations**

Local Outcome 6 **The people of the Outer Hebrides derive maximum benefit from the natural and cultural resources of the area, whilst at the same time safeguarding those resources to benefit future generation**

Tourism Plan outcomes

More people are in higher skilled, better-paid jobs;

Tourism integrates with other sectors to provide a stable economic platform for business growth;

Tourism makes an increasing contribution to the islands' economy and society;

Residents have high confidence and pride in Hebridean culture, and its appeal to visitors;

An enhanced and protected built and natural environment, enjoyed by visitors.

Nature-based tourism represents much of the current tourism appeal of the Outer Hebrides. As shown below (Table 7), activities undertaken by visitors in 2008 were

dominated by connecting with the natural heritage assets of the islands – scenery, beaches, walking opportunities, viewing wildlife or enjoying the plant life.

2.1.1 Outer Hebrides tourism partnership plan

This Plan (OHATP, 2009) highlights the priorities and activities that will be undertaken to grow tourism in the Outer Hebrides between 2009 and 2015. Its vision is to support and develop a competitive industry, focussing on quality and customer service that is sustainable and builds on the environment, history, culture and hospitality of the people. This vision is expressed in a series of long-term outcomes for the tourism economy:

- Tourism makes an increasing contribution to the islands' economy and society;
- Tourism integrates with other sectors to provide a stable economic platform for business growth;
- Residents have high confidence and pride in Hebridean culture, and its appeal to visitors;
- More people are in higher skilled, better-paid jobs;
- An enhanced and protected built and natural environment, enjoyed by visitors.

The Partnership Group, which includes VisitScotland, CnES, HIE, SNH and the Outer Hebrides Tourism Industry Association, share the aspiration of growing the value of tourism by 50% by 2015 in line with the Government's Tourism Framework for Change.

The Group has identified the following key issues:

- Seasonality
- Product Development
- Inconsistent accommodation and service quality
- Improved transport coordination
- Coordination of public and private sector interests

Human and financial resources will be required to deliver this through developing the customer experience (skills and accessibility), investment, and marketing and sales.

The Plan identified the key product themes as the environment, culture, activities and food and drink. Regarding the environment it states;

'The main reason people give for visiting the Outer Hebrides is the natural environment. It is a key contributor to the growth of the tourism sector. Wildlife tourism has grown in importance, and includes walkers enjoying mountain and island scenery and visitors observing wildlife at specific sites. There are opportunities for attracting visitors out of season to experience the various movements of migrating birds and the diverse range of habitat types and species found in the Outer Hebrides.'

2.1.2 Analysis of current information on visitor numbers and attitudes.

This section reviews current knowledge on tourism, including aspects that may not immediately appear to have a direct connection to the nature of the islands, eg food, arts and crafts.

The Outer Hebrides Tourism Facts and Figures Update Report (Snedden, 2007) is based mainly on passenger data and accommodation statistics. Snedden suggests that more than 1,000 FTEs (perhaps 1,250) would be supported by tourist spending of £49.9 million. These FTEs include multiplier impacts.

Table 1 - Headline Statistics for Tourism

	Scotland	Highlands	Outer Hebrides (Snedden, 2007)
Tourism Value	£4.2 billion	£658 million	£49.9 million
Visitor Numbers	16 million	2.63 million	195,766
Visitor Origin	UK 82%	n/a	UK 76%
Visitor Spend	£263	£250	£255 per visit
Tourism Jobs	218,200	14,500	1,000 ftes

Snedden provides the following breakdown of this total as below in Table 2:

Table 2 – 2006 Volume and Value of Tourism in the Outer Hebrides

	No. of Visitors	Average Spend (£)	Total Spend (£)	% Total
Holiday & VFR	137,412	258.18	35,477,030	71.1
Business	52,364	264.58	13,854,467	27.8
Yacht Visitors	5,990	96.02	575,160	1.2
Total	195,766		49,906,657	100.0

More detailed and recent information has been summarised below from the TIC Visitor Survey in 2008 (Macpherson, 2009). Visitors traditionally tend to be middle aged or older and there has been a slow trend in this direction over the years. In 2008, there was a sharp reduction in the number of children to less than half the recent levels, and a large jump in the number of over 55s (although the extent of these changes will reflect the survey's small sample). The proportion of over 55s has risen from around one third in 2002 to almost two thirds in 2008.

The 2008 Macpherson TIC survey comprised 428 interviews and found that 76.1% of respondents lived in the UK. This is consistent with all recent years. The largest single component of the overall market comes from England (46.5%). 83.8% of those interviewed arrived by ferry, and 47.3% were repeat visitors. Visitors to the Outer Hebrides stayed an average of 9.1 days in 2008, with English visitors staying an average of 10.1 days.

The breakdown of length of stay was as follows:

0.4%	stayed	1 night
5%	stayed	2 nights
41.2%	stayed	3 -7 nights
32.7%	stayed	8-14 nights.
6.5%	stayed	15-21 nights
2.7%	stayed	> 22 days
11.5%	no response	

Satisfaction levels of the tourism experience in the Outer Hebrides are high, with the expectations of only 1.9% of respondents not having been met. The opinions of first timers show that they had a very positive experience.

A questionnaire circulated by the Outer Hebrides Tourism Industry Association at the end of the 2009 season was returned by 38 of their members. This revealed a very upbeat response, with 16% saying their turnover was more than 50% up on the previous year and a further 46% saying that it was up by more than 15%. 72% considered that the RET pilot was very important in this increase. 97% considered that the trend towards 'staycations' was either important or very important in this respect also. 89% considered the exchange rate important or very important

2.1.3 Visitor Information Centre numbers

VisitScotland operates 5 Visitor Information Centres in the Outer Hebrides. All apart from the Centre in Stornoway are seasonal. It is intended that the Stornoway Centre will move into a renovated Town Hall as part of an integrated Comhairle Service Point. This is planned for the end of the 2010 summer season.

Visitor numbers are kept for all these Centres and anyone crossing the threshold is counted, whether or not they directly engage with staff.

Table 3 –Visitor Information Centres Visitor Numbers

	<u>2009</u>	<u>2008</u>	<u>2007</u>	<u>Increase 2008-09</u>
Stornoway (to end Nov) (all April to end October)	24,285	17,145	16,530	+42%
Tarbert	32,485	26,339	26,566	+23%
Lochmaddy	11,076	8,715	8,696	+27%
Lochboisdale	8,845	8,458	8,052	+5%
Castlebay	20,410	20,717	20,116	-1.5%

The RET pilot (see below) has contributed to these increases. The lack of increase in the Castlebay figures is considered to be due to very good local advice available within the accommodation sector (pers comm Project Steering Group).

2.1.4 Accommodation

Snedden's 2007 study provides the most up to date assessment of accommodation stock. This was based upon a review of all available information through VisitScotland and other promotional material. This review indicated the following distribution of types totalling 3,688 beds, throughout the islands.

Table 4 – Outer Hebrides – Estimated Total Accommodation Supply 2007

	Hotel	Guest House	B&B	S/C	Hostel	Camp/ Caravan	Total
Providers	28	22	108	256	13	3	430
Rooms (serviced)	477	115	342	-	-	-	934
Rooms (other)	-	-	-	791	49	-	840
Beds (serviced)	881	216	531	-	-	-	1628
Beds (other)	-	-	-	1647	241	172	2060
TOTAL BEDS	881	216	531	1647	241	172	3688
% providers Using VS	82%	86%	79%	59%	77%	67%	68%

Only 68% of the accommodation providers identified were using the services of VisitScotland. This is a reduction from 86% in 2003.

This report also provides a geographical distribution as follows, but does not break this down to individual bedspaces:

Table 5 – Accommodation Providers by Island

Providers	Hotel	Guest House	B&B	S/C	Hostel	Camp/ Caravan	Total
Lewis	9	15	46	93	4	2	170
Harris	4	3	17	69	5	0	98
N Uist	5	0	13	26	2	0	46
Benbecula	2	2	3	9	1	1	17
S Uist	4	2	16	26	1	0	49
Barra	4	0	13	33	1	0	51
TOTAL	28	22	108	256	13	3	431

In 2009, 103 serviced accommodation businesses were registered with VisitScotland, down from 129 in 2006. This is felt in some part to be due to a reluctance on the part of younger island residents to take on the business when they buy properties that have been operating as B&Bs. There is also some perception in the industry of a consumer move away from B&B to self-catering. However, the 2008 TIC survey in 2008 showed that B&B accommodation was still the most frequently used type of accommodation (31.9%) – although this was down from 39.5% in 1999.

Occupancy rates in the Outer Hebrides differ from the average figures for Scotland as a whole, with the area showing higher rates in the period May-August, but lower rates in the other months of the year. Appendix 1 gives the detailed breakdown of rates for different accommodation types and compares Outer Hebrides figures with Scottish averages. The variation between the months is indicated below, based on the 2009 season.

Table 6 - Outer Hebrides Accommodation Occupancy Rates – Variation from Scottish Averages

Month	2008	2009
Jan/Dec	12% - 13% below	12% - 13% below
March	12% - 21% below	17% - 24% below
April	12% - 22% below	5% - 17% below
May	1% below to +1% above	2% - 4% above
June	same to 4% below	7% - 11% above
July	1% - 14% above	1% - 10% above
August	3% - 18% below	5% below to 6% above
September	1% - 26% below	2% - 4% below
October	21% - 32% below	15% - 29% below

The figures cover the main accommodation types. In 2008 and 2009, the Outer Hebrides averages for May, June and July were above those for Scotland. There is clearly scope for additional growth in these months, but the greater opportunity lies in the months either side of this peak period.

2.1.5 Activities undertaken

Macpherson (2009) asked visitors what activities they had undertaken during their stay. The 2008 results are compared below with those from 1998, although comparisons are of limited value as surveys have shown significant variations in activities year-to-year, due undoubtedly largely to sampling. The sample in 2008 was only 260, and the demographics of the sample group are not necessarily consistent with those of the tourism population as a whole. Also, since the study, some new activities have appeared, such as day trips to St Kilda and the recent increase in enthusiasm for surfing. Despite this, the list of activities provides a useful starting point for understanding visitor behaviour.

There appears to have been an increase in active pursuits undertaken rather than the more traditional passive enjoyment of the islands, but this needs to be balanced with the large number of older visitors who have been identified in recent VisitScotland research (Continental Research, 2009).

Future studies would benefit from asking visitors what their main activities are, as well as what activities they have undertaken.

Table7 - Visitor Activities 2008

Activity	% of Visitors Surveyed	
	2008	1998
Sightseeing	82.7	83.1
Beaches/Seashore	71.2	70.5
Museums/Visitor Centres	54.2	60.1
Historical Sites	53.5	73.3
Photography	51.2	63.5
Hillwalking	44.2	60.7
Birdwatching	43.8	47.4
Flora/fauna	41.9	44.4
Cycling	16.5	19.5
Fishing	11.2	7.4
Sailing	5.4	3.4
Golf	5.0	1.9

Some of these figures show little change over the 10 years, but the following apparent trends should be noted:

- Reductions in identification of museums, visitor centres and historical sites as activities.
- Reductions in photography and hillwalking.
- Smaller reductions in birdwatching and flora/fauna as activities (although the 2008 birdwatching percentage was the highest since 2002).
- Increases in fishing, sailing and golf.

There are problems in placing too much emphasis on the figures above as much of the data is from self completed returns and is based only on those who visit a VIC. The survey will not tend to include sailors, golfers, fishermen etc, who will rarely if ever visit a VIC.

The tourism appeal of the Outer Hebrides is similar to that of much of the western seaboard and Northern Isles of Scotland, with continuing importance of sightseeing and enjoyment of the coastline, and high levels of interest in the habitats and species to be found on the islands. Interest in wildlife tourism is now increasing in other parts of Scotland, and the Outer Hebrides can demonstrate that this has been accommodated in the islands without any significant adverse impact on the area's natural assets.

2.1.6 Road Equivalent Tariff

Over the first nine months of the Road Equivalent Tariff (RET) pilot, which runs from October 2008 to 2011, car carryings on the Caledonian MacBrayne ferry routes to the Outer Hebrides increased as follows:

Table 8 - Ferry Statistics for Oct 2008 – June 2009

	<u>Cars</u>	<u>Passengers</u>
Oban to Castlebay / Lochboisdale	+26%	+19%
Uig-Tarbert / Lochmaddy	+25%	+16%
Ullapool-Stornoway	+24%	+13%

During the summer of 2009, there was a significant increase in camper vans travelling to the Outer Hebrides at least partly due to RET. Some on the islands have regarded this as a problem as it increases pressures on the Comhairle to improve toilet provision and provide dedicated stances for this type of vehicle. This is in hand and this increase should lead to return visits in the future now that the area has been 'discovered'. The camper vans are travelling widely through the islands, as reflected in significant increases in non RET internal routes.

Increases on Outer Hebrides routes are as follows:

Table 9 - Camper Vans Carried on Selected Ferry Routes

<u>Route</u>	<u>2007/08</u>	<u>2008/09</u>	<u>% Inc</u>
Berneray/Leverburgh (no RET)	90	179	99%
Barra/Eriskay (no RET)	70	108	54%
Uig/Tarbert/Lochmaddy	404	846	109%
Oban/Castlebay/Lochboisdale	77	124	61%
Ullapool/Stornoway	202	493	144%

RET has accelerated an underlying trend in increased camper vans over the past ten years.

2.1.7 Nature-based tourism in the Outer Hebrides

Table 7 (Section 2.1.4 above) indicates the range of activities that are undertaken by visitors to the Outer Hebrides. This section will consider each of these in turn and review the existing information. Sources of information for these activities are highly variable. Where specific studies have been undertaken for one sector, it is often the case that the results cannot be directly compared with other sectors as there is inevitable overlap in spend and economic impact. Visitors to the Outer Hebrides often have a range of interests and few come to the islands just for one reason.

At the end of this section new activities which were not identified within the Macpherson surveys are considered to ensure full coverage up to early 2010.

2.1.8 Sightseeing

The Outer Hebrides conveys a range of mental imagery for anyone who has ever visited these islands. The interplay of sea, land and sky, rugged hills, beaches, machair and crofting communities creates a unique landscape that is a classic representation of the Western Seaboard of Scotland. This is exemplified by images of west Harris beaches with a backdrop of the Hills of Harris – perhaps the quintessential view of the islands and one of Scotland’s strongest landscape images.

But the Outer Hebrides has much more to offer the sightseer. A journey through the islands reveals a wide range of landscape types, from wild mountain scenery to populated crofting landscapes. The details are considered in Section 2.2 below.

The landscape character of the islands is a significant draw for visitors deciding to cross the Minch, but it also provides a backdrop for other activities that they may identify as a reason for visiting. The “tourism product” for the islands cannot be considered in isolation from this landscape.

Whether a visit is by car, camper van, bicycle, cruise ship, yacht or on foot the landscape is a key component of the visitor experience. Much visitor activity on the islands would not occur if it were not for their landscape qualities. Walking and cycling will be considered below. Specific information is available for cruise boat visitors.

2.1.9 Beaches/seashore

It is impossible to separate the experience of enjoying the coastline on the Hebrides from general sightseeing. The islands have had a tradition of open access with a limited path network. A European funded programme, the Coastal Access Project, allowed for the creation or improvement of access to 20 beaches throughout the islands. A range of initiatives in the past have provided leaflets and panels for a variety of locations throughout the island chain, but many of these are no longer available; the leaflets are now out of print and the panels have been removed or damaged.

Surfing, kite-surfing and sand kiting have all grown recently as knowledge about the sand and wind assets of the Outer Hebrides have spread amongst enthusiasts. These communities are well connected to social networking sites and have developed their own information sources through websites such as www.magicseaweed.com

2.1.10 Museums and visitor centres

The islands have a range of museums, local heritage society facilities and other visitor centres. Table 10 below shows the number of visitors over the last four years (where available). At the time of writing, numbers were not available for the whole of 2009. The Visitor Attraction Monitor (VAM), commissioned by VisitScotland, up to September 2009 included eight attractions in the Outer Hebrides, and these showed an increase in visitors of 10.8% from 2008 (249,699 compared with 225,309). This compares with increases of 1.0% for Orkney, and 1.2% for Shetland. This was significantly better than the overall Scottish average increase of 3.4% (www.visitscotland.org), and RET will have been a major factor.

Visitor numbers include Outer Hebrides residents as well as tourists, which is particularly relevant to interpretation of visitor numbers for the new An Lanntair. Round figures, and some other returns are estimates.

Table 10 – Number of Visitors Counted at Visitor Attractions

Attraction	2008	2007	2006	2005
An Lanntair	191,873(E)	186772(E)	-	-
Taigh Chearsabhagh	29,792	34,031	31,188	33,486
Calanais Visitor Centre	14,476	19,795	19,584(E)	18,268
Gearannan Village	13,092	13,355	11,600	11,616
Arnol Blackhouse	11,431	10,208	10,697	10,475
Morvern Gallery, Borve	n/a	n/a	9,000(E)	n/a
Seallam Visitor Centre	9,000(E)	no count	8,000(E)	9,000(E)
Taigh Tasgaidh Chill Donnain	n/a	n/a	5,953	4,856
Museum nan Eilean	7,540(E)	3,584(E)	15,017	14,618(E)
Kisimul Castle	4,932	5,616	4,222	3,435
Dualchas Barra	n/a	n/a	2,497	2,417
Comunn Eachdraidh Nis	1,724	3,525(E)	n/a	n/a
Kilda Cruises	1,050	850	n/a	n/a
Uig Heritage Centre	n/a	n/a	n/a	1,005
Shawbost School Museum	560(E)	800(E)	800(E)	980(E)
Berner Museum	463	480(E)	472	382

The VAM 2008 notes a peak of just under 40% of visits in the third quarter of the year. Highland and the Northern Isles and other remoter rural areas show a very pronounced peak, with a much greater proportion of visitors to attractions in the third quarter. In 2006, the year before the new An Lanntair opened, the VAM showed a peak for the Outer Hebrides of 53% in the 3rd quarter.

An Lanntair is atypical of island visitor attractions as its central location, role as an arts venue, and catering and retail functions result in heavy and regular use by local residents. Taigh Chearsabhagh, to a lesser extent is similar. The Calanais Centre perhaps represents more accurately the penetration that museum and visitor centre attractions can generate. The Callanish Stones is the classic archaeological attraction for the islands and one of the iconic images for the Hebrides, and probably attracts twice as many visitors annually as the Calanais Visitor Centre records. An Lanntair and Taigh Chearsabhagh both receive substantial annual grant funding, and nearly all of the other centres would be uneconomic without volunteer effort.

Apart from the Callanish Stones, which are well known outside the islands, none of the attractions individually would generate more than a very small number of specific visits to the islands. Despite this they provide a vital role as information and interpretive facilities for the wider island experience.

2.1.11 Historical sites

A few of the attractions above are based upon the archaeology and history of the islands, but most are set within the landscape. It is difficult to separate the appeal of these from the environment in which they sit, and the natural setting complements a rich

asset base. Whilst not achieving the same recognition as Orkney for its archaeology, the Outer Hebrides has much to offer the enthusiast. The curious visitor has much to gain from exploring the islands' archaeology, but apart from the minority enthusiast, for most this is part of the wider landscape, crofting community and cultural experience.

2.1.12 Photography

The extent of this activity is related to the distinctive landscape qualities of the islands. For some, the potential to photograph iconic views will be a specific reason for visiting the islands. Photographs are an important means by which memories are rekindled and friends and relatives introduced to the scenic qualities of the Hebrides. They are also increasingly important means of connecting people through social networking sites such as Flickr and Facebook, and through video on YouTube. As such they are an important marketing tool which we will address later in this report.

2.1.13 Outdoor activities

An extensive appraisal of adventure based outdoor activity in the Outer Hebrides was carried out in 2004 (Rodger *et al.*, 2004). Outdoor activity is firmly based on the natural environment and the Outer Hebrides were seen as having many of the pre-requisites of an important destination, including:

- a unique and unspoiled environment
- spectacular scenery
- a perception of remoteness while still being accessible
- a strong local culture
- a wide and growing range of activities already available.

The appraisal considered provision through the voluntary, statutory and private sectors, providing a comprehensive profile of the adventure sector, its economic social and environmental impacts and its potential for development. As part of the study, interviews were held with over 50 providers covering activities such as abseiling, boating, diving, hillwalking, kayaking, rock climbing, sailing and surfing.

The picture that emerged was of a diverse range of activities, with a significant amount of co-operation and joint working between operators. However outdoor provision was seen as being at an early stage of development. Factors such as the short season and associated operating costs meant that most operators needed another source of income, either tourism related, such as accommodation, or outside tourism altogether, to create a viable business. Direct employment in the outdoor activity sector was estimated at around 20 jobs. Nevertheless, taking into account the full impacts of the sector, including special events such as the Hebridean Challenge and the additional visitors attracted because of the opportunities to participate, outdoor activities were estimated to generate 136 full time equivalent jobs and around £2 million in additional household income through visitor expenditure of £2.3 million. In addition, there are economic benefits through population retention and in people attracted to live in the islands because of the availability of these activities and because of the natural environment that were not quantified in this study.

The study put forward a strategy designed to build on a strategic aim "to develop vibrant and sustainable outdoor provision for local people and visitors". Over a 10 year period the recommended strategy aimed to increase both the number of visitors whose main

interest is in adventure activities and the take up of opportunities to participate by other visitors. A 50% increase in the annual value to the islands was suggested as achievable through the strategy.

The strategy was built on developing the product, marketing and skills and monitoring progress – in particular making it easier for people to access information about the availability of activities in the Outer Hebrides and making these opportunities easy to book and to take up.

These principles also feature prominently in the recent report on the proposed development of long distance cycle and walking routes through the Outer Hebrides from Vatersay to the Butt of Lewis (Wood-Gee, 2009). The report suggests that the rich cultural heritage, historical interest and variety of scenery to be found in the Outer Hebrides are potentially of very significant appeal to visiting walkers and cyclists, and would help make this an iconic long distance route attracting visitors from all over the world.

The report concluded that a walking route of 327km and a long distance cycle route of 271km would cost around £1.6m. The Comhairle has already approved £625,000 of capital spend on a range of developments between 2009 and 2012. The report considers that this route could bring significant tourism benefits to the islands.

It concludes with the following statement:

'The rich cultural heritage, historical interest and variety of scenery from white sand beaches to wild mountains to be found in the Outer Hebrides are potentially of very significant appeal to visiting walkers and cyclists. Development of formally recognised waymarked long distance routes would offer a unique opportunity to enjoy all of these attractions. The variety of landscape, scenery and inter-island ferry links could help make this an iconic long distance route attracting visitors from all over the world.'

This potential development will be considered further later in this report.

A range of businesses and providers help to connect the visitor with the natural environment of the Outer Hebrides. Appendix 2 is taken from the VisitHebrides brochure and website and provides a guide to the range of services on offer.

2.1.14 Hillwalking/walking

The Outer Hebrides have no Munros and only one Corbett (An Clisham), but nevertheless provide an exciting hillwalking environment, with outstanding scenic qualities. The presence of the one Corbett will undoubtedly ensure that many hundreds, and possibly more than 1,000 walkers per annum, will visit the islands to gain this summit. Other smaller but distinctive summits provide outstanding panoramas of the island landscape (particularly in the Uists) of the unique loch strewn landscape.

As stated above there is a tradition of open access in the Outer Hebrides, and consequently for visitors who do not wish to take to the hills the provision of footpaths has been limited. Paths were generally developed for utilitarian reasons – for peat, for seaweed and for conveying coffins to their final resting place. Generally they were not effective as an access network for tourists.

The three-year Western Isles Countryside Access Programme (WICAP) co-ordinated development, upgrading and signage of approximately 190 km of paths. These were mainly circular walks in response to local community demand and/or linked to sites and features of interest to visitors. Promotion and marketing of the routes developed through WICAP has been relatively limited, however.

The Outdoor Access Strategy for the Outer Hebrides is available online at www.cne-siar.gov.uk/countryside/accesstrategy.asp (CnES, undated). It features a vision and action plan for outdoor access based on the results of access audits and surveys. The main objectives were:

- developing new paths to link existing paths and networks;
- maximising economic potential through development of access, including preparing funding bids that would support training and employment in construction, path management and outdoor related businesses;
- promoting the Outer Hebrides as a walking destination for tourists;
- encouraging responsible access to popular historical and archaeological sites;
- encouraging responsible access to sensitive natural heritage sites;
- promoting access to provide health benefits;
- the identification of one or more long distance routes.

2.1.15 Birdwatching

'...one of Britain's most remote and beautiful corners, where waders still breed in abundance, where divers in full breeding plumage haunt the lochs, where Golden Eagles soar, and where, almost uniquely now, the rasping calls of Corncrake can still be heard around the crofts.'

(The Travelling Naturalist Wildlife Holidays descriptor on website 2009)

As the quote above illustrates, the Outer Hebrides is valued very highly by birders. Few other places offer the potential of seeing corncrake, corn bunting, golden and sea eagle, red and black throated diver, a wide range of breeding waders, a resident population of greylag geese and a wide range of seabirds, or the fairly recent promotion of the opportunity to see red necked phalarope. Classic sites include the machair lands of the Uists, the peatlands of Lewis and the outstanding seabird colonies of St Kilda and the Shiantas.

There are out of season opportunities to see large and dramatic seabird passages, and the islands are renowned for many trans-Atlantic rarities. Although unpredictable, in time and place, rarities can attract significant attention from the many thousands of keen 'twitchers' throughout the UK, and can often bring an out of season boost to local tourism businesses.

Many of these species are relatively accessible to the casual birdwatcher, and sightings within such dramatic landscapes live long in the memory. This accessibility lends itself to the beginner who can be introduced to bird watching in a very rewarding environment.

The RSPB actively promotes the islands and currently has two reserves: the machair lands of Balranald and the phalarope site at Loch na Muilne. Other promoted sites will be considered in the next section. With 1.2 million members, the RSPB can help generate significant impacts through this type of promotion. If the RET pilot continues, more and more birders will find it affordable to visit this unique location and add it to their list of classic locations visited.

The power of television to promote areas with wildlife interest, particularly bird-watching, has been demonstrated by the impact of Springwatch on places like Mull and Shetland. Every opportunity should be taken to raise the profile of the islands through this medium and also through articles in relevant countryside magazines

2.1.16 Flora/Fauna

The next section considers the range of habitats within the Outer Hebrides, which is extensive – from mountain top to sand dune and salt marsh. Perhaps the classic feature is the flowering displays of the machair in July, but the islands have much to offer the enthusiast in a relatively small area.

The opportunities to see mammals have been increasingly promoted, with the strength of the otter population, the resident dolphins in the Sound of Barra, and Tiumpan Head for whale watching all well promoted. As yet, infrastructure provision is limited, however, and this will be considered later in this report.

2.1.17 Cycling

The popularity of cycling the length of the islands has increased significantly in the last 10 years, although numbers are not available. Currently there is limited provision of specialist support or dedicated cyclist friendly accommodation. The potential development of a 271km cycling route has already been identified.

The National Cycle Network (NCN) guidelines identify the target market for such a route as recreational touring cyclists likely to have panniers, rather than mountain bikers travelling light looking for thrills. The design standards outlined for the NCN call for routes to be suitable for use by a novice adult cyclist, a family with young children or a sensible unaccompanied 12 year old.

2.1.18 Fieldsports, including fishing, shooting and stalking

The Outer Hebrides have long had a strong reputation for diverse salmon, sea and brown trout fishing. The islands offer a huge choice of freshwater lochs and the opportunity to undertake 'wild fishing' in genuinely 'wild country', often remote from human contact. The evidence from the VIC survey of 2008 indicates an increase in fishing activity by tourists (although the keenest fishing visitors do perhaps not often use VICs).

Like the rest of the tourism economy, 2009 was successful for fishing. The season has two principle periods with brown trout being the focus for May and June and salmon and sea trout from July to October (pers comm Donnie MacIver, Outer Hebrides Fisheries Trust. Both periods are well subscribed and opportunities for growth are limited as the fisheries managers seek to manage fishing pressure. The international nature of the

activity has grown in recent years with the arrival of many Irish fishermen seeking to replace the loss of west coast sea trout in West Ireland. Opportunities have been identified in the myriad of hill lochs in Lewis and Benbecula for brown trout. The promotion of fishing is well co-ordinated through Fish Hebrides, and there are opportunities for the inexperienced visitor to try out the activity with support from guides. Some groups prefer to try fishing together with other wildlife experiences.

Detailed information on the importance of fishing to the tourism economy is now quite dated and the figures in the following paragraph are taken from a report to the Western Isles Fisheries Trust in 2000 (Fisheries Resource Management Ltd, 2000).

In 1999, there were an estimated 7,500 game anglers visiting the Outer Hebrides, representing 4.6% of all visitors. Spend was calculated at £3.98m (12% of all visitor expenditure). The report indicates that direct expenditure accounted for at least 185 full time equivalent jobs, 1.9% of the working population. The capital value of the fishery was estimated at £17m pa. Of this, 48% was spent on accommodation, 20% on fishery rentals and 12% on meals and drink. The balance was spent on tips, merchandise, travel and boat hire. 21,000 non angling visitors in 1999 expressed interest in angling if facilities and information were improved. The results of the VIC survey seem to indicate that this increase has in part been achieved.

The survey asked anglers what it was about the experience that attracted them to the Outer Hebrides. The responses could be applicable to other recreational activities, and indicate the importance of the natural environment and the relatively undisturbed nature of the area.

Table 11 - Why Anglers Choose to Fish in the Outer Hebrides (%)

	<u>First Reason</u>	<u>Second Reason</u>	<u>Third Reason</u>
Catching fish	24	10	11
The environment	23	17	15
Fishing in remote places	22	19	18.5
Peace and quiet	15	24	22.5
Fishing in different places	6	12.5	9

Stalking and shooting also attract visitors to the Outer Hebrides. Snipe and woodcock are a speciality of the islands, along with the more traditional goose, duck and grouse. Walked up snipe and woodcock in particular, but also duck and goose shooting, appear to provide a significant contribution to the local economy – especially over the winter when most of this activity takes place. We have been unable to find any specific figures for this activity, but it would appear several hundred woodcock are being shot annually. An approximate price for four days shooting might be £4-5,000, excluding accommodation and travel.

Deer stalking is undertaken on a number of estates. North Harris, North Uist and South Lewis cull perhaps a couple of hundred stags, and associated expenditure per stag could easily be £500-1,000. In addition, there is some hind shooting, although its economic value is much less. Appendix 3 indicates the levels of activity of these pursuits and gives some indication of the accommodation provision and associated costs.

Sea angling is another popular activity. The 2009 Scottish Sea Angling study (Radford *et al.*, 2009) gives comments as follows on sea angling in the Outer Hebrides.

'In summary we believe that 117 jobs would be lost if sea angling ceased in the Western Isles and there would be a drop in income into the area of some £2m and £2.8m.'

The trend over the last 10 years of community land acquisition presents significant opportunities to open up all traditional field sports to a wider audience, and consequently bring greater economic benefit to the local communities involved. This change in land ownership should be promoted as a positive aspect of field sports in the Outer Hebrides.

2.1.19 Sailing

In response to a question in the Scottish Parliament (Written Answers, Tuesday 9 December 2008) the Minister reported an estimate that the annual economic impact of the marine leisure industry in Scotland is £250 million, supporting around 7,000 jobs, with sailing accounting for £130 million of this. He also indicated that the World Wildlife Fund estimates that coastal tourism in Scotland contributes £375 million to the economy.

The Outer Hebrides offers challenging and dramatic sailing conditions, and sailing visits are increasing. Traditionally suffering from being too far from major marinas and support services, the islands are gradually improving mooring and support services and benefiting from increased berthing facilities on the west coast. Stornoway Harbour Trust has experienced an increase in leisure craft visitors, with numbers up from 220 in 2008 to 262 in 2009. Limited moorings are also available throughout the rest of the islands, but visiting boat numbers are still small.

2.1.20 Golf

The Outer Hebrides has four principal courses in Stornoway, Barra, Scarista on Harris, and Askernish on South Uist.

Barra, Harris and South Uist offer a golfing experience that can be considered as back to the basics of the sport, for many a welcome antidote to the global dominance of manicured parkland courses (although such courses are not typical of the golf courses that attract very many visitors to Scotland). Askernish has received considerable recent attention following its 're-discovery'. The course was first laid out by Old Tom Morris in 1891, and has recently been restored to its original condition using entirely traditional design principles. Environmental experts have already hailed Askernish as "the most natural links course in the world": the dunes' natural contours form the fairways, no artificial chemicals are used in maintenance, and during winter months sheep and cattle graze the course. The unique nature of the Askernish links makes it particularly attractive to devotees of golfing history.

The course, recently extended to its original 18 holes was on target before the end of the year to achieve its objective of attracting at least 1,000 people to South Uist in 2009 specifically to play golf. The course has a £220,000 seven year plan to improve and enlarge its greens, and is proving popular with Americans because of its history. Day trip packages with Flybe and overnight packages through Scotia Travel have been arranged.

2.1.21 Cruise ships

Scotland is considered to perform well at the premium end of a highly segmented industry, with unique luxury island and expedition cruises linked to the islands, heritage and wildlife (TTC International *et al.*, 2006). There is a specialist cruise market based around the Outer Hebrides, which is featured in the '100 Best Cruise Vacations in the World'

The Outer Hebrides has been attracting an increasing number of cruise ships. In the 2009 season, six different ships visited on 23 occasions and berthed at 20 locations. These vessels carried a total of 5,683 passengers (pers comm, Stornoway Harbour Master) These visits were primarily by smaller vessels such as the Hebridean Princess, but other ships (Polar Star, Clipper Adventure, National Geographic Explorer and MV Quest) have berthed at Callanish, Eriskay, Castlebay and Lochmaddy.

The Hebridean Princess spends approximately 35 days out of a total season of 260 days in the waters of the Outer Hebrides, with 25 of these offering opportunities to go ashore. This is very much top end of the market with the vessel carrying a maximum of 49 guests paying on average £550 - £1,250 a day on 7-9 day cruises.

For the many devotees of this very special cruise ship, exploring by sea is the very best way to experience the astonishing beauty of Scotland.

(Hebridean Princess 2010 Brochure)

The scope to increase cruise liner visits to the Outer Hebrides and to attract larger ships with improved deep water berthing facilities is illustrated by the impacts that have been achieved in Shetland and Orkney. Around 25,000 passengers from about 50 liners were expected in Lerwick in 2009, with cruise liners estimated to have generated £1.5 million for the Shetland economy in 2007. In Orkney, cruise ships boost the economy by £2.8 million per year through the spending of c30,000 passengers and 10,000 crew from 60-70 cruise ships. 94% of passengers came ashore, according to a survey, and their average spend on touring and shopping was £49 (Westbrook, 2009).

St Kilda was visited by 23 cruise boats during 2009, with a total of 1,840 passengers (pers comm NTS Property Manager) venturing ashore in Village Bay. The peak visitor periods are May and June. This represents 47.5% of visitors to the island. All of these arrivals make arrangements in advance.

Day visits to St Kilda are a recent opportunity, with 1,400 (37% of its total visitors) visiting in 2009. Traditionally, visitors are on longer cruises and the majority stay on board their vessels in Village Bay. There are four regular providers: Kilda Cruises; Sea Harris; Sea Trek and North Uist Outdoor Centre. They are expected to contact NTS before they arrive and ensure passengers are well briefed.

Day trips to St Kilda are characterised by their unpredictability due to the weather, and also by the dedication and commitment shown by those wishing to visit. Kilda Cruises offer an average of 1.5 to 2 trips a week and passengers have to spend a minimum of two nights in the area, although many will spend a week to make sure they get on the

trip. Additionally, the NTS spend £30-40,000 per annum in the Harris economy through work parties going to and coming back from St Kilda

The NTS also own Mingulay, Pabbay and Berneray, and consider there are no problems caused by the 300-500 visitors. Most travel with Barra Charters (Donald MacLeod). The Trust provides camping and climbing guidelines. Cruise ships anchor but mostly do not land, while Clearwater Paddles visit but their clients have to be experienced.

2.1.22 Food

Traditionally the Outer Hebrides has exported most of its quality produce off the islands. Top quality seafood and meat has long been associated with the islands, but recently, with the expansion of the tourism sector and greater demand from visitors, it has been possible to provide some of the best local produce for consumption on the islands. The range and availability of excellent eating opportunities, serving local food, has increased, and tourists can be assured of a high standard of food if they know where to eat.

The Hebridean Food Trail, with 20 members, reflects the island wide provision of quality products and gives access to outstanding produce for locals and visitors alike. Several producers provide an additional tourism experience through giving visitors access to the production side of their business activity. This encourages both immediate purchases and subsequent loyalty to the products.

2.1.23 Arts and Crafts

Many artists and crafts people, local and in-migrants, operate their businesses from the Outer Hebrides. The quality of the environment, the light and the cultural context all inspire creativity and can bring a unique sense of place to the artefacts created. Access to these arts and crafts in situ can enhance the visitor's experience and create a connection with the islands that persists long after the purchaser returns home. Some of these arts and crafts people run their businesses as a full time activity, but many others have made a life style choice to develop their skills more as a hobby. This is a constraint on the future growth of this sector.

The globally renowned Harris Tweed is an iconic product of the islands, with the World famous Orb trademark overseen by the Harris Tweed Authority. The existence and future of the tweed industry cannot be separated from the qualities of the environment. Harris Tweed is intrinsically linked to the natural environment of the Outer Hebrides, with colours and designs influenced by machair grassland and the changing colours of the light on the land and sea. In many ways, tweed is a craft surrogate for the islands, their nature and the character of the communities themselves. See the following references:

<http://www.harristweed.org/> and <http://www.harristweedhebrides.com/>

and also the Harris Tweed Artisans Co-operative, whose members make clothing and other products from Harris Tweed:

<http://www.harristweedartisanscooperative.co.uk/>

The Gaelic culture of the islands is a key source of creativity for much arts and crafts, and often the environmental setting has an important influence. The environmental arts course at Taigh Chearsabhagh, supported by Lews Castle College, sustains 20 students within the Uists. Whilst not directly a tourism activity the presence of these creative individuals should have a tourism spin-off for the area. Taigh Chearsabhagh is aiming to become a centre for excellence for environmental art, and has initiated many public art projects set in the landscape which are sustainable and sensitive to the location e.g. 'Hut of the Shadows' by Chris Drury.

Music and song are a key part of this Gaelic identity and the successful Ceolas, the Gaelic performance summer school, brings many first time and repeat visitors to the islands, attracted by the culture but also by the environmental setting provided. Writing and poetry contribute also to creating a sense of place.

A list of Arts and Crafts businesses that base much of their material on the natural environment of the Hebrides has been provided by Elsie Mitchell, Crafts Development Officer with the Comhairle (see Appendix 4). This demonstrates the vibrancy of the arts and crafts sector in the Outer Hebrides and the direct connections between the artists and the environment in which they choose to work. This list is for illustration and is not intended to be comprehensive.

'..... look at the web-sites of many of the crafts-makers and visual artists working in the Outer Hebrides today and selling their work to tourists and you will find that the majority of the work is influenced and inspired by the stunning natural environment of the Outer Hebrides.' (pers comm Elsie Mitchell, Crafts Development Officer CnES)

One of the main reasons for visiting the Outer Hebrides is the quality of the natural environment and many tourists want to buy art or craft that is made there, reflects, and reminds them of their holiday experience and the places they have visited. In addition to arts/crafts reflecting the Outer Hebrides as a whole, much of the work made is very specific to the local areas in which the artists-crafts makers live and work.

Two existing initiatives that link crafts with wildlife and environmental tourism are the Hidden Lewis marketing initiative (<http://www.hiddenlewis.org.uk/>) and the Art on the Map studio trail (<http://www.taigh-chearsabhagh.org/>). Many Uist based artists are making prints and paintings of the natural environment around them, e.g. Margaret Fenton. There is also a current feasibility study into setting up a mini mill in the Uists to process wool from sheep based in the Hebrides and to make craft products from the wool. The study was due to be completed at the end of December 2009.

2.1.24 Feedback from the industry

A total of 18 individuals and businesses involved with tourism in the Outer Hebrides were spoken with (see Appendix 5 for list), excluding the members of the steering group. Their views were sought on five key questions, and a summary of their responses is provided below

Q1 How would you rate local business confidence in 2009 on a scale of 1-5 (1, low, 5 high)

Most respondents considered business confidence within the Outer Hebrides tourism sector as relatively high, mainly based on a good year for many operators in 2009.

Q2 Are you likely to increase, maintain or decrease current levels of marketing effort in the coming year?

Most respondents were optimistic and indicated they were likely to increase or at least maintain marketing effort. Some had already invested in new websites and customer data base management and were focussing their efforts over the next 12 -18 months to consolidate rather than increase their investment.

Q3 What is the appeal of the natural environment to your customers?

- Landscapes, Atlantic beaches were mentioned most often
- Wildlife species customers would like to see most are otters and eagles.
- The opportunity to visit iconic sites like St Kilda are an important motivation for some visitors.
- 'Intangible' qualities of wildness, remoteness, solace, peace and quiet
- Most operators identified a mixed or generalist interest in landscape, wildlife and culture amongst their customers.
- Customers are seeking a holiday in a special environment first and foremost, rather than a skills training or instruction course.

Q4 What are the constraints on your nature based tourism development?

Relating to tourism on the islands in general

- Scepticism of the commitment the public sector is giving to the development of tourism in the Outer Hebrides.
- Development focus appeared to be primarily on large renewable energy projects.
- Difficulties in gaining small amounts of financial support to help develop their businesses and expand the season into the shoulder months.
- Short 20 week April to September season is seen as the major constraint, particularly for those operators employing people.
- The short season is a problem when recruiting good staff and guides/instructors as they normally cannot be retained over the winter.
- During the main season the challenge is finding staff accommodation.
- Limited accommodation capacity on the islands during the summer months is a real constraint for incoming tour operators.
- Quality and uniqueness in accommodation provision was considered to be lacking
- Camping provision and 'up market' serviced accommodation are limited.
- Lack of the appropriate provision for watering and disposal of waste from motor home and caravans.
- Infrastructure limitations were identified, most notably a lack of public toilets, but also car parking at road ends with access to beaches.
- A lack of complementary activities and choices is especially an issue for families with children.

Specific to nature based tourism

- Visitor Information Centres not informed on the range of natural heritage tourism options and how to access these.
- Wet weather facilities (eg wildlife/heritage interpretive centre) were considered lacking by both accommodation providers and wildlife trip operators.
- Signage was considered particularly poor, with new visitors struggling to orientate themselves and find natural heritage sites like walks and beaches, with some intimidated by the remote landscapes and lack of services.
- Poor information on what attractions, craft outlets, galleries and coffee shops are open, especially at the start and end of the season.
- Path networks (other than in Harris) needed improvement with signage and way marking to reassure visitors of their location and progress.
- Poor infrastructure for small boat launching and lack of secure storage for trailers.
- Specialist outdoor skills requiring governing body certification – sea kayaking and climbing, for example, tend to be provided by imported seasonal staff.
- A lack of language skills amongst heritage/wildlife guides dealing with the increasing number of visiting foreign cruise boats.
- Visitors skilled in wildlife watching or outdoor pursuits tended not to seek the services of a guide unless they were short of time or needed specialist knowledge or equipment such as a boat.

Q5 What are the key opportunities for developing sustainable nature based tourism in the Outer Hebrides?

Relating to tourism on the islands in general

- Improved public sector coordination and a clear message of support for the tourism industry in the Outer Hebrides, accompanied by a clear point of contact for Outer Hebrides customer feedback, a willingness to respond to feedback and a commitment to address continuous improvement.
- An understanding that tourism businesses, like other businesses, need facilities such as childcare and access to suitable workspaces and communication links.
- Enhanced communication on what to do and where to go.
- Strategic review of bedspaces in the Outer Hebrides to identify future need by location.
- Improve availability of impulse 'short notice' guided walks and trips – with guides connected by a central booking system, email and mobile phone.
- Supporting investigations into new or enhanced facilities eg public toilets, camp sites, trails and look out points, improved access for older and disabled people onto boats (pontoons), purpose built vessels for wildlife watching, and innovative accommodation adapted for the climate and connecting people with the environment.
- Addressing seasonality issues by extending the core main season by four to five weeks. Winter activities can work but they require extremely efficient planning and service to deal with weather, limited daylight and restricted activity options.

Specific to nature based tourism

- Differentiation between the islands to increase the appeal of the natural environment overall.

- Supporting investigations into new or enhanced nature based activities eg sea angling, self guided natural heritage itineraries, dog friendly activities, and day visits from Skye.
- Demand appears to suggest more support for a 'mixed product' of wildlife, landscape and culture – but there is a danger of becoming too general and losing focus on key activity delivered to a high standard.
- Protection of key natural assets to ensure a sustainable supply eg sea trout and salmon runs (threat from aquaculture), bird shooting (threat from over exploitation and habits change), and landscape (threat from large scale onshore wind developments).
- Greater links between the arts and craft providers and the nature based tourism providers in the Outer Hebrides to ensure an affordable range of products are available for the visitor to take home or purchase through the internet as a memento of the natural heritage assets of the Outer Hebrides.
- The new terminal at Stornoway catering for cruise boats is an opportunity to improve interpretation of the natural heritage.
- The International Adventure Travel Conference scheduled for September 2010 in Aviemore was suggested as an opportunity to showcase nature based tourism in the Outer Hebrides.

Other comments

Customers for nature based tourism activities tend to:

- Be older (50 plus)
- Come mainly from England
- Travel as couples
- Have quite high disposal incomes

Emerging markets include:

- Extended family groups (who often prefer self-catering)
- Young professional couples

Views on locations for visitor centres interpreting the natural heritage

- A general lack of support from businesses for the proposal to locate a St Kilda centre at Mangursthadh.
- Other locations mentioned included Butt of Lewis, North Uist.
- There were mixed views and no conclusions over the merits of several smaller seasonal nature based tourism centres in dispersed locations against a more centrally based centre open year round with space to encompass other topics such as Harris Tweed, distilling, brewing, craft work etc.
- Tarbert and Lewis Castle were mentioned as locations for a centrally based facility.

Quotes from operators

A range of quotes selected from the comments given by the 18 respondents are provided in Appendix 6:

2.2 Audit of natural heritage assets and attractions

The natural heritage assets and attractions of the Outer Hebrides are many and varied, but only some offer significant potential for growing the tourism economy. This section considers what is available to contribute to enhancing the future tourism experience.

2.2.1 Landscape of the Outer Hebrides

As previously noted, general sightseeing is by far the most popular activity for tourists visiting the Outer Hebrides, founded upon the landscape of the islands. Over 40% of the area of the islands is designated National Scenic Area, confirming the truly national significance of the landscape. There are three National Scenic Areas: South Lewis, Harris and North Uist; South Uist Machair; and St Kilda.

SNH has undertaken a detailed assessment of the islands' landscape types, and these offer an inventory for the visitor. Some landscapes provide a dramatic and obvious attraction whilst others are more subtle. For a large number of visitors the whole island chain has a scenic quality that defines the Outer Hebrides experience.

2.2.2 Landscape Character Assessment

A landscape character assessment of the Outer Hebrides was carried out by Richards for SNH (Richards, 1998). This was revised and additional levels of sensitivity introduced through a detailed re-assessment in 2004 (Benson *et al.*, 2004). These reports conclude that there are four main categories of landscape in the Outer Hebrides: Crofting, Machair, Boggy Moorland and Mountain Massif, with an additional category of coastal mosaic that does not fit any of these four. These can be further sub-divided into 14 identifiable landscape types. Each of these is briefly described in Appendix 7, with their key locations identified.

2.2.3 Conservation designations

The Outer Hebrides has a number of internationally and nationally important environmental sites. The jewel is St Kilda, the only natural and cultural World Heritage Site in the UK. Other uninhabited offshore island groups include the Shiants, Monachs, Flannans, and North Rona while the Mingulay and Berneray group provide special places for wildlife.

There are other important sites in the Outer Hebrides designated under European Union directives. Special Areas of Conservation and Special Protection Areas are part of the Natura 2000 network. The European Union Habitats Directive gives protection to a range of species that the visitor can see in the Outer Hebrides but which are uncommon in Europe, including bottlenose dolphins, golden eagles, corncrakes, otters, black throated divers and Atlantic salmon. Particularly sensitive habitats and natural features, including shallow inlets and bays, sand dunes, seal and sea bird colonies, are attractive for people to visit and enjoy.

Non government organisations (NGOs) including the Royal Society for the Protection of Birds (RSPB), the National Trust for Scotland (NTS) and the Scottish Wildlife Trust (SWT), have reserves or properties in the Outer Hebrides, mainly on account of their

natural heritage interest. Other NGOs, including the Hebridean Whale and Dolphin Trust, the Seawatch Foundation, the Marine Conservation Society and the Whale and Dolphin Conservation Society, also have close interest in the environment of the Outer Hebrides.

As the Outer Hebrides contain such important natural resources and varying landscapes, there are several different types of environmental designations, managed by SNH, to protect them. Table 12 illustrates the extent of the designations. Some areas have multiple designations so the hectares in column three cannot be added together:

Table 12 - Conservation Designations in the Outer Hebrides

Designation Type	Number	Area (ha)	% of Outer Hebrides
National Nature Reserves	4	3,237	1.1
SSSI	53	37,350	12.9
National Scenic Area	3	116,600	40.3
Special Area of Conservation (EU designation)	11	32,959	11.4
Special Protection Area (EU designation for birds)	15	31,538	10.9
RAMSAR	4	71,305	24.6
World Heritage Site – St Kilda	1	853	
Marine Consultation Area (non-statutory)	7	27,557	

The core national designation in the Outer Hebrides is the Site of Special Scientific Interest (SSSI). An SSSI can be designated as Biological, Geological or Joint Biological/Geological. 12.9% of the land area in the Outer Hebrides is designated as SSSI, although the true percentage is slightly lower as the SSSI areas include inland waters and intertidal areas, which the overall total does not.

The Outer Hebrides has 53 SSSIs, of which 31.5 are in Lewis & Harris and 21.5 in the Southern Isles (the Small Seal Islands are split between the two). The Lewis and Harris SSSI covers 8.5% of Lewis and Harris, and the Southern Isles SSSI covers 25.1% of the Southern Isles. Individual SSSIs vary in size between North Harris SSSI which covers 12,920 ha and Cnoc a' Chapuill which covers just 0.2 ha.

These sites support a wide and diverse range of habitats and species, which are formally identified in the process of designation. These are referred to as 'features of interest' and are listed in Appendix 8. This illustrates the diversity and strengths of the islands' environment. A summary of features is given below:

Table 13 - Aggregated Number of Features of Interest identified within Designated Sites

Categories of Interest	Designations			
	SSSI	SAC	SPA	Ramsar
Earth Sciences	20	-	-	-
Mammals	1	4	-	-
Birds	68	-	78	11
Fish	-	2	-	-
Invertebrates	3	1	-	-
Non Vascular Plants	4	-	-	-
Vascular Plants	-	2	-	-
Marine	27	9	-	3
Coast	38	20	-	1
Freshwater	17	10	-	4
Woodland	5	-	-	-
Wetland	11	-	-	-
Upland	10	13	-	1

Birds, Coast, Freshwater and Uplands are the most significant at the EU level; and Earth Sciences, Marine, and Wetlands at the national level.

It is critical in understanding the relationship of the visitor to the Outer Hebrides and the environment of the islands to appreciate that the existence of specific designations is largely immaterial to them. The key point is that they are a recognition of the quality and importance that the visitor will attribute to the whole of the island chain. Much of the wildlife can be seen almost anywhere; birds and sea mammals can be encountered throughout the islands and do not respect designation boundaries.

The St Kilda World Heritage site and the National Nature Reserves, together with the RSPB reserves, are the only 'designations' that are actively promoted for nature based tourism – although there is some low level promotion of sites like Loch Maddy and the Lewis Peatlands. SNH more actively promotes NNRs to visitors and has developed a website and provides free leaflets, although onsite facilities are virtually absent.

2.2.4 Sites currently visited by wildlife enthusiasts

As indicated in 2.1.15 above, bird-watching and the flora and fauna of the islands are interests of over 40% of the existing visitors to the Outer Hebrides (although much of this is casual and not their main reason for visiting). A wide range of sites are identified on the Wildlife section of the Outer Hebrides tourism site, by SNH and RSPB and the local County Bird Recorder. Most of these relate to bird-watching as this is a mature activity, pursued by a wide and generally well informed audience. Appendix 9 indicates those locations that have been identified for this study. The following locations are identified by three or four sources and are given as examples. This list is not comprehensive and new locations such as Loch na Muilne, Loch Stiapaphat and Mingulay, Berneray and Pabbay appear on occasion.

Lewis

Lewis Castle grounds
Loch Branahue
Tiumpan Head
Gress
Garry
Barvas Moor and Muirneag
Valtos and Reef

Harris

North Harris Hills
Luskentyre and Seilibost
Northton and Chaipaval

North Uist

Lochmaddy and Loch an Duin
Balranald
Benbecula

South Uist

Ardivachar and Loch Bee
Loch Druidibeg
Loch Eynort
Rubha Ardvule
S Coast of S Uist

2.2.5 Audit of natural heritage assets

Our audit of the natural heritage assets and attractions of the islands highlighted those with most potential for marketing to a wider audience.

Only some can be classed as attractions in as far as significant numbers visit or view the asset currently. Some offer particular potential for the tourism sector.

This Typology/Audit is derived from the consumer's perspective. It uses five criteria for assessment, which are scored and aggregated to give a measure of the asset's potential to contribute more to nature based tourism. The criteria were:

Typology of current interest – wildlife and scenery

What level of inherent interest does the asset possess and is it likely to be attractive to a range of visitor types?

1. Dedicated – experienced and knowledgeable – organise themselves
2. Passing interest – relatively inexperienced
3. Casual interest – some experience but value guidance/direction/interpretation
4. Charismatic place or species interest

Accessibility

How accessible is the asset? This ranges from those assets that require considerable activity to access to those that are generally accessible to all

1. 'Strenuous' walk/boat charter
2. Easy Walk
3. Boat (guided) – *this takes account of the journey being part of the experience*
4. Road side

Visitor Facilities

Is the asset supported by any visitor facilities?

1. None
2. Minimal – leaflet/sign/car park
3. Managed

Attractiveness

Is the asset locally, regionally or nationally attractive?

1. Locally significant
2. Special Outer Hebrides experience
3. Top 10 Habitats
4. Top 10 Species
5. Iconic Outer Hebrides

The current numbers of people accessing these assets has also been assessed. We have used a scale representing rough orders of magnitude. These are best estimates in the absence of accurate data

Estimate of numbers

1. More than 10,000
2. 1,000 to 10,000
3. 100 to 1,000
4. Up to 100

Some niche activities, with limited numbers participating, can generate relative high economic impact, however, and this is covered later in this report.

2.2.6 Results of audit

Appendix 10 presents the full assessment of all the assets considered. The following assets are ranked on the basis of how they scored (only those with a score of 10 or more are included). Below this score the asset has either limited interest, is inaccessible, has limited or no facilities, or is not all that attractive (or a combination of all of these) and is considered to offer limited scope to meet the aims of this project. The assets are ranked by the current numbers enjoying the asset.

Table 14 - Highest scoring Natural Assets in the Outer Hebrides

<u>Asset</u>	<u>Score</u>	<u>Numbers</u>
Wildlife Cruises	15	2
St Kilda	15	2
Classic Viewpoints	15	1
Seabird Colonies	13	3
Game Fishing	13	2
Dolphins, whales and seals	13	1
Basking Sharks	12	4
Machair Flora	12	2
Golf on traditional courses	12	2
Headlands – Butt of Lewis	11	2
Sea Angling	11	2
Coastal and Low level walking	11	1
Arts and Crafts	11	1
Food and Drink	11	1
West Coast Beaches	10-11	3
Otters	10	3
Eagles	10	3
Rough Shooting	10	3
Red Deer	10	2

The higher the score and the fewer the number of existing users, the more potential there is to increase visitor experience. Each of these assets present a range of challenges, however, and these are considered later in this report. It is clear from several statements above that the cultural and natural assets of the Outer Hebrides are inextricably linked, and for most visitors indivisible.

2.3 Review of existing and planned services

A wide range of services support nature based tourism in the Outer Hebrides, and others are planned. This section will review these and assess them against market requirements.

2.3.1 Existing centres

As indicated in 2.1.3 above, there are five VICs in the Outer Hebrides providing information for visitors. Section 2.1.10 lists the various visitor attractions to be found around the islands. None have a strong focus on the outstanding nature based assets of the Outer Hebrides.

2.3.2 Existing information sources

Website

The VisitHebrides website was developed during the early 1990s. Six niches are promoted and have their own individual web presence: Culture Hebrides; Cycle Hebrides; Fish Hebrides; Golf Hebrides; Outdoor Hebrides and Wildlife Hebrides.

At the time of its development this was an innovative suite of websites that brought measurable benefits to the islands. This has tailed off as the site's functionality and relevance to a modern audience has fallen away, and it is now time to upgrade this important marketing tool to meet the needs of today's market. This is discussed later in this report.

Guide Books

The area is covered by the VisitHebrides Guide produced through VisitScotland and also an accommodation guide. Demand for these traditional products is reducing, however, (pers comm. VisitScotland) as online sources of information are increasingly used.

All the standard tourist guides mention the Outer Hebrides and invariably enthuse about the natural environment. Coverage in Scotland-wide guides is limited, however.

TV and Magazines

Coverage through these media can generate significant returns and provide knowledge of the Hebrides to a previously unaware audience. In January, the National Geographic published a 24 page article about the Hebrides (includes the Inner Hebrides) (<http://ngm.nationalgeographic.com/2010/01/hebrides/warren-text>) with outstanding images. This will have done a significant amount to raise the profile of the islands, and this effect is likely to last as the magazine is regularly recycled to other readers. The effect of programmes such as Coast and Spring and Autumn Watch on

Mull and Shetland has been documented, and the Outer Hebrides are occasionally covered through activity programmes, though with limited national networking.

Local Publications

A range of publications currently in print support the nature based tourism sector. The following indicate the range available:

- Comhairle nan Eilean Siar
Western Isles Walks – a series of 12 guides describing walking routes, wildlife and local heritage features.
- Scottish Natural Heritage
The Outer Hebrides – Places to visit for wildlife and landscape – a map indicating and describing 46 locations throughout the islands.
The Outer Hebrides – A landscape Fashioned by Geology – booklet describing the geology and geomorphology of the islands.
NNR publications covering St Kilda, Rona and Sula Sgeir, Monachs and Loch Druidibeg
Loch Maddy – a lacework of land and sea. A leaflet explaining the interests within the marine SAC.
Loch Stiapabhat Local Nature Reserve, a leaflet jointly produced with Comunn Eachdraidh Nis describing the nature reserve.
- RSPB
Rare Beauty – Where to see wildlife in the Outer Hebrides – 17 locations good for bird watching.
- VisitScotland
Outer Hebrides Visitor Guide 2009 – a guide to the best of the Hebrides.
Outer Hebrides Accommodation Guide 2009 – a guide to all VisitScotland registered tourism services.
Outdoor Hebrides – World Class Outdoor Activities in stunning wild landscapes – produced by CrES and VisitScotland.
- Community based
Urras Ceann a Tuath na Hearadh – guide to the North Harris Trust.
Ravenspoint – leaflet about visitor facility in South Lochs.

Also, a range of information and interpretive panels are distributed around the islands. These have been developed through a range of initiatives and many are now out of date and need to be removed or replaced. The exact number and location of these is not known to the Comhairle and auditing these was beyond the scope of this study. The following is a partial listing:

Archaeology panels:

Lewis/Harris - Dun Eisdean, Port of Ness, Garrabost, Point, Northton.

Uists - Rubha Ardvule, Bornish, Langais, Dun an Sticir, Newton, Nunton, Howmore

Barra - Vatersay causeway

Other general panels that have been installed but might not still be there include Vatersay Causeway and Eoligarry, Barra, Ludag and Loch Bee, South Uist, Carinish, Sollas and Berneray, North Uist. There are a number of others put up by community groups in Lochmaddy, etc. There are also a number of information points at various

roadsides in Lewis and Harris (they are like bus stops) but their exact locations are not known.

2.3.3 Proposed new developments

St Kilda Centre

At the time of writing, the Comhairle were in the process of determining the requirements of a world class St Kilda Centre which would evoke a sense of place. It has been recognised that the St Kilda islands hold a strong emotive pull on many visitors, but few are able to visit. This is a story that is waiting to be told.

The study team of Jura Consultants, Page / Park Architects and Equal Design Studio consulted a range of communities to identify the optimum location and considered material produced by the community groups wishing to host the proposed Centre.

The work included the following:

- Consideration of the scale and characteristics of resident and other visitor markets which may be attracted to, or may use the Centre, to inform an assessment of viability.
- Review of existing visitor volumes, utilisation of ferry and air routes and performance at visitor attractions in the Outer Hebrides and across Scotland.
- A site analysis of each of the proposed locations to consider issues of setting and accessibility.
- Consideration of the interpretation opportunities associated with each location and the extent to which this could strengthen or support the development of the Centre in a particular location.

The following facilities were considered for this development irrespective of location:

- World class exhibition galleries including remote access interpretation
- Audio-visual presentation, e.g. potentially cinema / theatre presentation
- Research facilities
- Education room / multi-purpose room
- High quality cafe
- Retail
- Visitor information point, highlighting other significant sites and services with relevance to St Kilda, and other attractions in the Outer Hebrides

At the conclusion of this process the study team recommended Mangerstadh in West Lewis as the preferred location.

Stornoway Town Hall

The Comhairle plans to refurbish Stornoway Town Hall to increase civic and community usage of the facility and improve the building. The Town Hall is currently under-used and one of the purposes of the proposed new development will be to improve usage of all areas of the building. According to the Comhairle website, www.cne-siar.gov.uk, the aim of the proposals is to create a flexible and accessible building at the heart of Stornoway with a mix of complementary uses that will provide economic and community benefits. It is recognised as an iconic landmark building with an important central place both in the town and in the economic, cultural and social life of the community.

The Point Street section has been opened as a One Stop Shop service centre for the Comhairle, and this has proved very popular. According to a letter published in the West Highland Free Press in January 2010 from Councillors MacDonald and McCormack, the South Beach section is to be developed used for cultural and community use with the Registrar, Archivist, VisitScotland and Stornoway Historical Society as the principal tenants. This would make the building a key information hub for visitors to Stornoway, easily accessible for passengers from the Ullapool ferry. At the time of writing detailed plans for the South Beach section were not available, but it has been proposed that an 'indoor street' will be created where VisitScotland, Comainn Eachdraidh, charitable organisations and community groups will be able to promote their activities.

Hebridean Way

A wide range of individuals and organisations have been keen to see a long distance walking and cycling route developed through the Outer Hebrides. At present there is no official route.

Section 2.1.13 above indicates that a walking route of 327km and a long distance cycle route of 271km would be possible at an estimated cost of £1.6m.

Ravenspoint

The Ravenspoint Centre, a former school building, is owned by Co-Chomunn na Pairc (the Pairc Community Co-operative) and operated mainly by volunteers on behalf of the community of South Lochs. The Co-Chomunn currently runs a small shop (the only one in the whole area), a 14-bed hostel, and a tea-room, and rents out offices for local groups.

The Co-Chomunn has developed plans for Ravenspoint to become a vibrant show-case for the whole community and for visitors, improving and developing services and attractions based on important local resources of a distinctive history and Gaelic culture, and very special wildlife such as Golden and White-tailed Sea-Eagles.

Development plans, subject to funding, include exhibitions featuring live footage of eagles at their nests, and providing more information about the area's history (for example the important Angus Macleod Archive) and Gaelic culture; and upgrading the hostel, particularly for those wanting to explore the area's landscape and wildlife, and learn more about its history and culture. Unfortunately an application for lottery funding

has recently been refused, but the group is continuing to consider how the project might be taken forward.

Lochboisdale Regeneration Initiative

Sealladh na Beinne Moire is currently seeking partnership financial support for the first phase of the regeneration of the harbour and surrounds of Lochboisdale. Phase 1 will involve infilling land at the head of the existing pier infrastructure, building a new road of approximately 1.31m and a causeway of around 0.31m, and preparing Gasay island (currently unused) for future developments (Westbrook, 2009).

Sealladh na Beinne Moire envisage that in the future, following this work, new facilities of potential relevance to the development of nature based tourism will include:

- A 30 berth marina for local and visiting boats, with full services and an over-wintering facility.
- Plots for 40 new houses – a mixture of owner-occupied, private rented and housing association properties – whose occupants would provide part of the workforce that new and expanded businesses in the vicinity would require.
- A twin berth pier for ferries, cargo traffic and cruise liners, removing the congestion in the vicinity of the current ferry pier and facilitating potentially substantially increased usage of the harbour.

2.3.4 New development opportunities

The Scottish Rural Development Programme (SRDP) is a £1.6 billion programme of economic, environmental and social measures, which runs until 2013. Individuals and groups may seek support to help deliver the Government's strategic objectives.

Within this Programme, the Rural Development Contracts - Rural Priorities (RDC - RP) provides an integrated funding mechanism for projects that will provide environmental, social and economic benefits. Rural Priorities is a competitive mechanism to ensure that contracts are awarded to the proposals which are best able to deliver the agreed regional priorities. Within the Outer Hebrides a local Advisory Committee has been established which is responsible for devising and updating the Regional Priorities in this area.

Regional Priorities have been established to help achieve five key outcomes of the SRDP, one of which is '*Thriving Rural Communities*'. Within this priority there is potential support for:

Diversification of Rural Enterprise Priorities

These priorities focus on the improvement of rural enterprise through diversification. A range of approaches to delivering this are identified, but of specific importance to this report is the maximisation of tourism. This offers a range of opportunities for groups and individuals through:

1. Improvement in the value and duration of tourism visits in rural areas, including maximising opportunities for green tourism.

- support land-based tourism initiatives which support the Outer Hebrides tourism strategy
 - develop and support distinctive rural tourism initiatives in the Outer Hebrides
 - support the development of distinctive tourism niches such as ecotourism/ wildlife viewing, activity/outdoors tourism and cultural heritage tourism
 - support specific events in rural areas
 - development of Green Tourism as a viable and important source of economic growth in the Outer Hebrides.
2. Improvements in integration between access and land management.
- Priority will be given to proposals that enhance access/land management integration in NSAs, the settlement coalescence study, and opportunities arising from the Greenspace/Open Space Strategy.
3. Improvements in facilities for specific user groups including all abilities.
- particularly proposals that include facilities for walkers, mountain-bikers, canoeists, horse-riders, divers, wildlife clubs and community interest groups

The Outer Hebrides has already demonstrated the potential of the above Programme through financial support for:

- New 4 star guesthouse and restaurant in Uig
- New campsite, bunkhouse and campervan site at Carinish, North Uist

Both these developments were supported with Rural Priorities Funding.

3 PRIORITIES FOR NATURE BASED TOURISM

Scottish Tourism: The Next Decade (Scottish Executive, 2006) states that:

“Sustainable Tourism in its purest sense is an industry which attempts to make a low impact on the environment and local culture, while helping to generate income, employment and the conservation of local ecosystems. It is responsible tourism, which is both ecologically and culturally sensitive”. The national strategy goes on to say that *“we need to ensure that tourism growth doesn’t result in the degradation of the very environment which is one of our unique selling points”* and *“We want to be Europe’s most sustainable tourism destination”.*

3.1 Examples of best practice

Innovative examples of good practice of UK destinations that are comparable to the Outer Hebrides are summarised below.

A primary factor in the success of these examples is collaborative partnership working, making the best use of limited resources and engaging complex interests.

Destinations have used public/private partnerships and joint working arrangements, as in Strangford Lough, to exploit opportunities and improve economic and social leverage. A partnership between more than 200 local, national and international stakeholders, Jurassic Coast has worked hard to bring the principles of sustainable tourism to the Dorset and East Devon Coast of England and has achieved international acclaim. Some destinations like Aviemore and the Cairngorms have focused on sales and marketing, researching the customer’s experience and focusing on advocacy/training for the private sector.

Businesses are encouraged to learn from each other and from other destinations.

Along the Norfolk coast, bird watching has been developed from a casual roadside or beach pursuit into a successful package of sustainable attractions based around bird reserves.

Successful destinations have generally also embraced best sustainable practice. Aviemore and the Cairngorms is a destination where businesses are encouraged to sign up to codes of practice and industry standards such as the Green Tourism Business Scheme (GTBS). The high number of GTBS accredited businesses in the area is a measure of its success. The National Park was the first protected area in the UK to achieve the European Charter for Sustainable Tourism in Protected Areas, in part due to evidence of businesses engaging in best practice. International awards are another measure of successful best practice. In 2005, the Jurassic Coast won the best destination award in the World Tourism and Travel Council Tourism for Tomorrow Awards as a leading example of responsible tourism. The Pembrokeshire Coast SAC is a good example of how a designation, viewed with suspicion by some as an impediment to traditional activities like fishing, can be exploited, through the provision of information, as a nature based tourism asset.

Scotland:

Aviemore and the Cairngorms Destination Management Organisation – Letting visitors do the talking

This locally based DMO in the Cairngorms National Park had significant start up public sector funding but is slowly gaining private sector involvement and investment. It is identified by Tourism Intelligence Scotland as an 'excellent example' of Web 2 in action. The DMO web site <http://www.visitaviemore.com/>, developed mainly 'in house' by DMO staff (1.5 FTE) with limited resources, has embraced Web 2.0 applications and is promoting the entire destination through visitor feedback. Nature based tourism experiences are illustrated by links to press releases and other dedicated nature based sites. Through the web portal, visitors can learn what there is to see and do and read about other people's experiences through blogs, see images through Flickr, and watch the action via You Tube. Survey Monkey is used for feedback.

The DMO encourages feedback through TripAdvisor, and 95% of businesses listed have their TripAdvisor reviews displayed on their promotional pages. The DMO provides training for local businesses on how to elicit and respond to visitor feedback. They encourage cross selling between businesses to share services. The DMO works closely with the Cairngorms Chamber of Commerce and other public bodies like the Cairngorms National Park Authority.

Other examples of destinations that sell and encourage visitor feedback are the Banffshire coast – <http://www.banffshirecoast.com> – and the Isle of Arran <http://www.visitarran.com/site/myarran>

England:

The Jurassic Coast

The Dorset and East Devon Coast World Heritage Site is England's first natural World Heritage Site – The Jurassic Coast. It covers 95 miles of truly stunning coastline from East Devon to Dorset, with rocks recording 185 million years of the Earth's history. The coast is managed by a team of ten people who deliver a programme of conservation, education, promotion and interpretation within a coast management plan. Their extensive branded web site <http://www.jurassiccoast.com/> is a key tool for marketing the area and carries promotions for gateway towns and villages, virtual tours, downloadable educational materials for schools, and news of activities and events. Visitors can also download podcasts, maps and leaflets in various languages to use on their trip. There is now a Jurassic Coast App for iPhones and iPods. Buses and trains carry Jurassic Coast livery as a constant reminder to visitors.

Valuing Norfolk's Coast

A study of visitors to six sites on the Norfolk coast in 1999 estimated that they spent £21 million per year in the local economy. Visitors attracted to these sites mainly by birds and wildlife were estimated to have spent a total of £6 million in the area, supporting an estimated 135 FTE jobs. The Norfolk Wildlife Trust's Cley reserve and Titchwell RSPB reserve were estimated to bring extra visitor spending of £2.5 million and £1.8 million respectively into the Norfolk coastal economy in 1999. In addition,

work by conservation organisations in managing sites in the Norfolk coast area supports 30 FTE jobs. The study identified a series of challenges for the management of Norfolk's coastal environment and the tourism that depends on it. These include maintaining the extent and quality of internationally important wildlife habitats in the face of sea level rise, reducing the environmental impact of traffic, ensuring that tourism benefits local communities, and managing the pressure from increasing visitor numbers. See: http://www.rspb.org.uk/Images/eangliaecon_tcm9-203972.pdf

Wales:

Pembrokeshire Marine Special Area of Conservation (SAC)

The Pembrokeshire Marine SAC includes a substantial part of the Pembrokeshire coastline and the Milford Haven Waterway. The islands in the Waterway are not included within the site, but the surrounding shore, seabed and sea are. The Pembrokeshire Marine Special Area of Conservation was designated because it contains some of the best examples of marine habitats and species of European importance – despite the locally intensive pressures of human activities on the marine environment, particularly during the last century. Their web site explains where the site is, why it is designated, how it is managed and what benefits occur as a result. People can find out how to become involved and details of interested parties are provided.

See: http://www.pembrokeshiremarinesac.org.uk/english/benefit/ben_c.htm

Northern Ireland:

Strangford Lough

Strangford Lough's northern tip is only about 6km from the outskirts of Belfast and is therefore accessible to large numbers of people.

Strangford Lough Management Advisory Committee (SLMAC) provides advice to Government on the strategic management of the Lough. It is comprised of stakeholder organisations and departmental nominees representing the main interests around the Lough. Research by the SLMAC showed people did not feel connected with the Lough. To address this, a programme called *Turn O' the Tide* was established. The programme includes a set of heritage projects, mainly funded by HLF, and a coordinated approach to Voluntary Management Initiatives to help people using the Lough for water sports to manage their activities so as not to negatively impact on other users or the environment. Initiatives include ecotourism training and accreditation for boat operators, an annual two week beach cleaning event, castaway evening for sea kayakers, and information on places to go and places to avoid. The intention is to exchange ideas and to embrace wider initiatives such as *Leave no Trace* and the *RYA Green Blue Initiative*.

See: <http://www.strangfordlough.org/management/mancomit.htm>

Marketing

The following points are considered important for organisations and businesses promoting nature based tourism:

- According to Wikipedia, 80% of UK consumers research online before booking a hotel and 50% refrained from booking as a direct result of a negative review.

- The average business loses 20% of its customer base every year and most don't know why.
- 68% of consumers say they are willing to pay up to 20% more to stay with an organisation offering exceptional services.
- The cost of winning new business versus retaining customers can be as high as 20:1
- Of all the reasons cited for customers who stopped using a service company - 68% were due to employee indifference.

3.2 Codes of practice

A range of codes which highlight best practice have been developed to help those engaged in tourism activities connect more sustainably with their surrounding environment.

With the exception of the Scottish Outdoor Access Code which has a legal evidential status, codes are not a law or regulation. Their over-riding purpose is to raise awareness and offer practical guidance.

Some codes are aimed at all operators, whilst some trade associations – such as Wild Scotland, the membership body for Wildlife Tourism operators – have developed their own code and charter – compliance being a condition of membership.

Other codes are for a more general audience. Public knowledge of codes is variable and some also have a limited 'shelf life'.

The Code that has had the most promotion recently through television and press advertisements is the Scottish Outdoor Access Code. According to the 2007 Scottish Recreation Survey report, the percentage of respondents who were aware of the Scottish Outdoor Access Code was higher in 2007, with an average of 60% who had either definitely heard of, or thought they had heard of the Code, in comparison to 56% during 2006, 40% during 2005 and 13% in 2004.

The 2006 SNH Marine and Coastal Recreation Review (Land Use Consultants, 2007) shows that, overall, just under 60% of respondents were aware of a code of conduct relevant to their specialist activity. Awareness was highest amongst sub aqua divers, speed boat/personal watercraft users, sailors, those using metal detectors, and climbers. A number of these activities have codes of conduct designed to address issues of safety (e.g. sub-aqua and sailing) whilst others have codes of conduct responding to concerns about environmental impact (e.g. metal detecting, speed boating) In the study, while many respondents referred to legitimate codes of conduct, many were more general or vague in their answer to this part of the survey, often citing general principles or elements of other codes.

For nature based activities in the Outer Hebrides, the following examples of codes, guidance and initiatives produced by a variety of governing bodies and public agencies could be relevant:

- General access – Scottish Outdoor Access Code
- The Scottish Marine Wildlife Watching Code

- The Scottish Fossil Code, prepared by Scottish Natural Heritage to provide guidance for those interested in the collection and care of Scottish fossils.
- The Scottish Wild Mushroom Code
- Wildlife Safe Marine Ecotourism (WiSE) Training and Accreditation
- Sailing – RYA Green Blue Initiative
- Sea Angling – National Federation of Sea Anglers Code
- Game Angling – Fish Disease Prevention, Black Throated Divers and Anglers
- Camping – Leave No Trace Initiative
- Dog Walkers – SNH Dog Walkers Code
- Surfing – Surfing Code of Conduct
- Sea kayaking – A Guide to Good Environmental practice
- Diving – British Sub Aqua Club – Divers Code of Conduct
- Hill Walking – The Mountaineering Council for Scotland have produced guidance/codes for hill walkers on deer stalking, water borne diseases and safe disposal of human waste
- Off Road Cycling – Good Practice Advice
- Birdwatchers Code of Conduct
- The Partnership for Action against wildlife crime produce a range of information aimed at combating wildlife crime.

3.3 Conclusions

Successful practices are often specific to the destination but the Outer Hebrides can learn from the experience of others, and adapt these experiences to meet its own needs.

Successful destinations have sought partnership working between public and private sectors. Innovation and new technology have been exploited. Limited resources are not necessarily a barrier, but resources should be focused to achieve the greatest return. Regular communication and dissemination of information is vital. Awards are a way of benchmarking against other destinations, and accreditation schemes provide vehicles to pursue independently verified best practice.

The influence of codes in the Outer Hebrides is unknown but it would appear that use and application are low, which is indicative of the minimal direct pressures exerted on the natural heritage by tourism. However, the use and promotion of codes to operators and visitors would underline the continued importance of good practice in minimising environmental impacts. Much work has already been done on code development, and adoption of existing material is recommended.

In addition to conventional leaflets and web based information, tourism businesses should be key portals for the dissemination of codes, and this may require codes to be included as part of awareness and training packages.

3.4 Marketing of the natural heritage

The tourism product of the Outer Hebrides is currently marketed through a number of channels – the VisitScotland network; transport operators such as Caledonian MacBrayne and Flybe; and the individual tourism operators on the islands. Marketing activity also includes area specific and niche market websites.

3.4.1 VisitScotland

VisitScotland promotes Scotland through the 'Live It. Visit Scotland' brand, presenting the spirit of Scotland as:

- awe-inspiring rural and urban scenery
- an ever-present sense of history
- welcoming people, passionate about and proud of their country.

The brand values from this emphasise Scotland as enduring, dramatic and human, and the promotional sub themes are:

- see it
- touch it
- hear it
- feel it
- smell it.

All of these messages fit closely with the tourism product in the Outer Hebrides and relate closely to the natural heritage. Not surprisingly, the natural heritage features strongly among the images used in the main VisitScotland website. Unfortunately none of the images in the slideshow on the home page are of the Outer Hebrides and the Image Gallery includes only eight images of the area (including a road sign). The Outer Hebrides section of the website includes some information on what there is to see and do, but this is not always easy to access. For example, eight businesses are listed for boat cruises, but one of these is listed under an Activities tab, while the others are listed under a Sightseeing tab (six as sea cruises and one as a wildlife tour). Linking to VisitScotland's wildlife site, a search returns four entries for wildlife in the Outer Hebrides – three sea cruises and one SNH reserve.

Following research in 2006, VisitScotland has developed a segmented approach to marketing, directing its efforts at those groups considered as having the best potential. The six market segments identified for attention are known as:

- Affluent Southern Explorers (W1)
- Younger Domestic Explorers (W2)
- Mature Devotees (W3)
- Affluent Active Devotees (W4)
- Southern Travel Junkies (C1)
- Northern Sometimers (C2)

For the Outer Hebrides, the most relevant key target growth markets are Affluent Active Devotees, Affluent Southern Explorers and Mature Devotees.

This segmentation informs VisitScotland's promotional activity. For example, a Perfect Day campaign has been promoted through Classic FM and an island Hopping campaign on Real Radio Scotland.

3.4.2 VisitHebrides

VisitHebrides is VisitScotland's dedicated regional brand for the Outer Hebrides and produces an Accommodation Guide and Visitor Guide. The guide puts an emphasis on the environment, with imagery concentrated on the beaches, landscape and wildlife. In the introduction, the attraction of the area is firmly founded on the natural environment:

"Clear turquoise seas and spectacular white beaches, dramatic sea cliffs, rocky inlets, rare birds and wildlife, warm hospitality, traditional Gaelic culture and wonderfully clean air. Whether you walk, cycle, golf, fish, surf or just soak up the culture - the Outer Hebrides is where your perfect break awaits."

VisitHebrides also provides the regional website www.visithebrides.com along with a number of subsites - Culture Hebrides, Cycle Hebrides, Fish Hebrides, Golf Hebrides, Outdoor Hebrides and Wildlife Hebrides. These were originally developed in 2002/03 with ERDF support, along with Roots Hebrides, Film Hebrides and Walk Hebrides. The current suite of websites is rather confusing for the user, with some accessible as pages within the VisitHebrides site and others not. The original sites (www.culturehebrides.com etc) are also still accessible direct (and are promoted in the Accommodation Guide), although www.fishhebrides.com is now directed to a site provided by The Outer Hebrides Fisheries Trust which acquired the management responsibility in 2004. The site no longer seems to have any connection to VisitHebrides, with its own accommodation section for which advertising income is sought. The VisitScotland fishing link takes users to a similar suite of sites but there is no obvious reference to this site on the VisitHebrides pages on fishing. The main VisitHebrides site also has no link to the walkhebrides.com or rootshebrides.com sites. Some of the information seems to have been left unchanged for some time. This is especially true when the former niche sites are accessed directly, but even on the main VisitHebrides site there is some out of date information. For example, on the golfing pages there is no mention of the renovation of the Askernish course, and the prospective visitor is told that they can play the course all day for £10.00. Functionality is also an issue. For example, a link is provided to allow users to order the 2010 Accommodation Guide, but unfortunately it does not work.

VisitHebrides.com is a popular website and has an important role to play in the marketing of the Outer Hebrides as a visitor destination, and as a source of information on the islands and the facilities and activities available. The main site had over 130,000 visits in 2009 and over 750,000 pages were viewed. This is an increase from 2008 (110,000 visits), but below the site's peak year in 2006 when there were 211,000 visits. Much smaller numbers visited the niche sites in 2009 and the trend for these seems to be downwards.

3.4.3 Transport operators

Caledonian MacBrayne, the ferry operator, produces an annual guide to its routes and the islands it serves. There is a strong focus on the natural heritage of the islands - the ferry trip itself is a tourist experience and perhaps more could be made of this to offset the cost. RET has reduced the cost of travelling to the Outer Hebrides from the mainland (at least for a period) and more could be done to promote this. It is not immediately apparent that fares are reduced, which both misses an important marketing opportunity. Promotionally, RET as a term is meaningless to most potential visitors

The pages on the Outer Hebrides in the ferry brochure include sections on History & Heritage, Outdoor Adventure, Nature & Wildlife, and Culture, Food & Drink. As with the VisitHebrides Accommodation Guide, it refers potential visitors to the outdated niche VisitHebrides sites, despite their inaccuracy and poor functionality.

Flybe gives limited information on its destinations in the Outer Hebrides on its website. Although it has a comprehensive list of destination guides, the Outer Hebrides destinations are not included. There are no links to appropriate tourism websites.

3.4.4 Other websites

There are a number of community and private websites which promote holidays in the Outer Hebrides. Some, such as www.isleofbarra.com and www.southuist.com, relate to a specific geographic location and provide community information as well as information useful to visitors. These can be used by providers not registered with VisitScotland to promote their accommodation or services. Others, such as www.virtualhebrides.com and www.enjoyhebrides.com compete with VisitScotland. For example, Enjoy Hebrides specifically points out that it has no association with Visit Scotland or Visit Hebrides and is a self financed organisation that has been formed to create an easy to use experience for both visitors and accommodation providers. Its primary aim is said to be to provide as direct a route to accommodation in the Hebrides as possible at no cost to the consumer and a fair cost to the provider.

www.gaelic-rings.com is a partnership site promoting six Rings – or round trips. Two of the itineraries involve the Outer Hebrides, based on Caledonian MacBrayne’s Island Hopscotch tickets No 11 and 15. Historic and cultural information is available for the main points on each route and a 148 page book can also be purchased. The website includes a short video for each journey highlighting “some of the stunning landscapes and seascapes”. Although this site promotes tourism based on culture and language, the natural heritage is an intrinsic part of the islands and the way of life.

www.thewesternisles.co.uk is not specifically a tourism site, although it includes events listings, weather forecasts, transport information and, through its web directory, links to a large number of accommodation providers. It also hosts daily updates of bird sightings in the Outer Hebrides, sections on wildlife and wild flowers, and invites user contributions and uploads of photographs. The site also hosts a wildlife forum, although the most recent post was in November 2008.

www.winterharris.com is maintained by the Isle of Harris branch of the Outer Hebrides Tourism Industry Association. There is limited information on the site but it is weighted towards the natural environment, activities and wildlife.

Tourism businesses and operators in the Outer Hebrides also market themselves online. www.hebrideanhopscotch.com puts together holiday packages for visitors across the Hebrides. Its website and brochure are heavily weighted to the special environment of the area. Other providers that promote holidays in the Outer Hebrides, like www.scotsell.com and www.wildernessscotland.com, also base their marketing on the landscape and environment, whether they are aiming at touring holidays or the adventure market.

Individual operators also market their services online, either on their own site or through an agency. Many accommodation providers promote the area through activities such as walking, fishing and birdwatching, as well as mentioning the beaches and machair. Some activity providers like www.western-isles-wildlife.co.uk go further – this website includes an up to date list of bird sightings. It also makes its activity product relatively easy to access – which is important in attracting people to the Outer Hebrides, in converting interest into bookings and in helping people make the most of their time on the islands. Holidays and day tours are clearly set out so that the potential customer knows what is involved, knows what it will cost and can book without inconvenience. As stated in Tourism Intelligence Scotland guide “Scottish Tourism in the future...” Help your visitor by taking away the hassle of organising wherever you can. Don’t forget that their holiday begins at their front door not at yours.”

3.4.5 Conclusions

VisitHebrides has recently produced its marketing plan for 2010-2012. This indicates that the visithebrides.com website, along with all other area websites, is being brought under the umbrella of VisitScotland. VisitHebrides’ annual marketing budget will be £62,500, a 50% drop on previous figures, with no budget for marketing the website or attendance at exhibitions.

VisitHebrides.com was an innovative website when it was introduced in 2002. As mentioned above it continues to be well used and plays a major role in the marketing of the Outer Hebrides as a tourism destination. However, investment to upgrade it is required, and attention to ensure it is properly maintained. The links between the main site and the associated niche sites have become unclear, all the sites have non-functioning tabs, and the user cannot be confident that the site is accurate and up-to-date.

If community and business partnerships were developed, it would be possible to introduce some of the features of other sites mentioned above – events listings, wildlife sightings, the uploading of photographs etc – which would make the site attractive and alive for users. The partnership with Fish Scotland which has led to the Outer Hebrides Fisheries Trust taking over the www.fishhebrides.com site suggests that partnerships with the outdoor and natural heritage sector could be developed, but as a site for visitors this represents a starting point to be built on rather than a model to follow.

The current marketing of the Outer Hebrides bases the attraction of the area on the special nature of its natural heritage. This is a competitive market, however. A search on Google for UK sites on wildlife holidays brings up 274,000 results. The first pages include sites in Shetland, Orkney and Speyside, but none in the Outer Hebrides. As well as having a first rate natural environment the Outer Hebrides must communicate that to potential visitors, give them confidence in the product and make it easy for them to come for a short break or a longer stay. The internet can be an effective tool, and content can be transferred to printed material.

The Outer Hebrides is a relatively small part of Scotland’s tourism product, with a relatively small number of businesses. Co-operation and partnership working are therefore important to create critical mass. Sharing basic web content such as events information, weather, transport, wildlife and bird sightings, information on flora, walks and activities would be possible. Links to other websites need to be kept up to date - for

example several sites, including the Harris Tweed Authority, direct potential visitors to www.witb.co.uk as the Western Isles Tourist Board and there is no automatic re-direction.

As a further step, through Web 2.0, the industry can communicate with its customers and customers can communicate with each other, sharing their experience of the Outer Hebrides and its natural environment and uploading pictures, videos and comments. Creating a dialogue with customers and content that interests them even if they are not planning a visit is a step towards creating repeat custom. Marketing on the internet is not however like the production of a visitor guide, an annual affair. Sites must be constantly refreshed and updated. Dialogue with customers and users must be encouraged and nourished for the site to remain live. As with fishhebrides.com, this might be achieved through partnerships with interest groups.

Co-operation between operators in the Outer Hebrides could also increase cross-selling – raising overall visitor spend while increasing satisfaction. This would require activity providers to clarify the product they are selling, its availability and cost, and other operators (including accommodation providers) finding out what visitors want and helping them make a booking. Too often visitor information consists of a haphazard selection of leaflets to browse through with telephone numbers to ring for more detail. The tourist industry in the Outer Hebrides is small enough for operators to know about each other, be able to advise visitors about what they might do (or do next) and be willing to make the booking for them if desired.

4 RECOMMENDATIONS

The Outer Hebrides is a special place, with environmental qualities of global value. These are complemented by a unique culture, strong historical and archaeological assets, and arts, crafts and food sectors that reflect the outstanding environment of the islands. The island group as a whole is the “product” and should be regarded as a single destination by all involved in the industry, while acknowledging that the differences between the islands are part of the appeal of the natural environment.

The consultation we have undertaken has indicated that the level of ambition within the tourism sector has increased and there is more evidence of local entrepreneurial spirit. Business confidence within the tourism sector is relatively high, mainly based on a good year for many operators in 2009. The private sector does, however, still have a less than positive view of the public sector’s contribution towards the development of tourism in the Outer Hebrides.

The environment is the biggest single asset for the Outer Hebrides’ tourism industry and provides great opportunity to grow the tourism economy of the area. If the area is to meet the Scottish Government’s 50% growth target for tourism spend by 2015 it will be important to maximise the advantages of the islands’ natural heritage. Nature based tourism is the one part of the Outer Hebrides product which we consider can genuinely offer potential for significant growth. It is our view that by concentrating on the recommendations below, tourism can make a strong contribution to the economy of the entire area.

4.1 Key assets identified

The area’s key nature assets fall into five categories:

Wildlife Cruises – including trips to St Kilda, seabird colonies, dolphins, whales and seals, basking sharks, and sea angling

Classic Viewpoints – including headlands, in particular the Butt of Lewis

Accessible Countryside – coastal and low level walking, West Coast beaches and peat roads

Hebridean Wildlife – otters and eagles, machair flowers and birds

Field Sports and Golf – including game, fishing, sea angling, rough shooting, and red deer

4.2 The business view on nature based assets

Tourism businesses emphasised the following assets:

- Landscapes and Atlantic beaches.
- Otters and eagles.
- Opportunities to visit iconic sites – an important motivation for some visitors.
- ‘Intangible’ qualities of wildness, remoteness, solace, peace and quiet.

4.3 An ambition for nature based tourism

The scope for the specialist or casual visitor to experience nature in the Outer Hebrides is one of Scotland's major tourism assets. The area's perceived remoteness and 'ultima thule' appeal can be capitalised upon rather than being a negative feature. Together with comparatively accessible wildlife and heritage, relative remoteness can make the Outer Hebrides an attractive and aspirational destination for many. As yet, the economic value of this asset has not been fully realised. RET has reduced the relative cost of travel to the islands and an encouraging growth in visitor numbers for 2009 is reported, but shortcomings remain in the services and products that nature based customers experience. Other destinations are also gearing up their nature based customer propositions, and competition is important to keep under review.

With stronger and more effective promotion of these assets, investment in products and services, and subject to the availability of suitable accommodation, ferry and air access, we believe that annual visitors to the Outer Hebrides could be increased by c 50,000 per annum by 2015 – a 25% increase on current visits to the area – although an increase of 25,000 might be regarded as an achievable interim target (eg within three years). This increase would be achieved through increasing the stay time of existing visitors, enthralling them to return more often and encouraging them to act as ambassadors for the Outer Hebrides. Many new visitors will be attracted by recent visitors talking about what they did on their visit to the Outer Hebrides (e.g. through a variety of links and continuously updated visitor generated content through Trip Advisor, other review sites, Flickr, You Tube, social networking sites and blogs). Increases in cruise boat visitors are anticipated, and some of these visitors would be expected to return in future years as converts to the special character of the islands.

The initial target is to raise accommodation occupancy rates across the year to the Scottish average. This is considered achievable – indeed the Outer Hebrides out-performs the Scottish average between May and August

An increase of 25,000 visitors might generate the following annual impact:

$$25,000 \times 5 \text{ nights average stay} \times \text{£}60 \text{ per 24 hrs} = \text{£}7.5 \text{ million} \div \text{£}37,500 \text{ per fte} = 200 \text{ ftes}^* \\ \times \text{£}18,000 \text{ average earnings per fte} = \text{£}3,600,000 \text{ income from employment}$$

Related accommodation and other business development for visitors interested in nature would also serve other markets, including visitors attracted principally by the culture, archaeology or genealogy of the islands.

Marketing initiatives should be focused on the shoulder seasons (and to a lesser extent the winter), whilst an enhanced accommodation supply, especially outwith Stornoway, would also help increase summer visitor numbers. Accommodation improvements are required for all market segments, from quality hostel-type provision for people travelling on budgets, through quality guest houses / B&Bs and small hotels for the mid-market (including "boutique" provision targeting a niche segment), to affordable luxury for the higher end of the market. Year-round sustainability from additional accommodation provision needs further investigation, but existing accommodation businesses would play a part in increasing bedspace provision over the year.

** full time equivalent jobs*

When daylight hours are short or the weather is inhospitable, comfort, excellence in services and facilities at their place of accommodation is particularly important for nature based visitors who will have spent their day outdoors. Accommodation should suit the natural environment but with modern bathrooms, drying facilities, books and CDs on local nature, and proprietors and staff who are knowledgeable about the islands' nature and other assets – building the area's reputation for innovative and welcoming provision.

Such developments, allied to improvements in infrastructure, would help rural parts of the Outer Hebrides achieve a sustainable future, stem population decline, encourage inward migration and improve the age structure of the resident population. Areas such as the west coast of Harris have already made progress, which began 30 years ago with businesses such as Scarista House, and more recent quality developments including the Blue Reef cottages and Kilda Cruises.

4.4 Key over-arching themes:

The following themes run through the recommendations:

Create a more memorable experience for those who are here already.

We suggest a range of developments that would enhance the experience of those who are already visiting the islands. The Outer Hebrides attract a large number of repeat visitors, and these people can be the best advocates for the area through bringing its appeal to the attention of the large number of potential visitors who have not yet visited or do not even know about the area.

Focus on enhancing demand rather than supply. Meet the needs of the market

Our recommendations focus on demand. Finding out what the visitor wants, and matching the outstanding assets of the Outer Hebrides with the demands of the market place and the visitor are key. The area is well placed to take advantage of trends in international tourism as a destination that can provide unique experiences of nature.

The quality of delivery should match the world class range of natural assets.

The Outer Hebrides offer globally significant nature of the highest quality, from scenery and wildlife to locally distinctive food. Today's discerning visitor expects all aspects of the product – the visitor journey – to match the quality of the natural world they come to enjoy.

4.5 Primary means of delivery

Extension of the season.

Our assessment of the area's key assets indicates significant opportunities to grow the shoulder months and tackle the current short season. This is a clear steer from our consultations.

4.6 Key recommendations

The following recommendations are considered particularly important if the contribution that nature based tourism makes to the economy of the Outer Hebrides is to be maximised:

- Develop the Visit Hebrides website as a portal that is more outward facing, responsive and interactive, with user generated content
- Focus on key nature based assets that offer potential for growth
- Create an environment in which businesses work in partnership to take recommended opportunities forward
- Achieve effective delivery through appointing a specialist with industry experience of Web 2 applications

These recommendations are expanded upon below.

4.7 Generic recommendations

The following issues relate to the tourism sector as a whole throughout the Outer Hebrides.

4.7.1 Seasonality

The key issue is how to fill the shoulder months, as the islands are generally at, or near, capacity during the period May to August. This also has a knock on effect in the retention of quality staff. The challenge is to extend the core main season by four to five weeks and build business through March to October. Winter activities can work but they require extremely efficient planning and services to deal with weather, limited daylight and more limited activity options than available in the main season.

The season can be extended through promoting the nature based tourism assets already identified that are more accessible during these shoulder months. The following assets are considered worthy of specific promotion:

Spring Promotion

- March-May, the main period for breeding seabirds
- Spring migrant birds present
- Main breeding period for waders on moorland and machair
- Peak period for breeding bird song
- Jan-March, bird of prey activity/territorial and mating
- Good underwater visibility
- Equinoxial gales at the beginning of the period

Additional attractions in the spring include lambing and the absence of midges.

Autumn Promotion

- Deer rut
- Autumnal peatland colours
- Autumn migrants
- Salmon spawning
- Salmon and sea trout fishery

- Autumnal storms
- Fewer midges

Winter Promotion

- Grey seal pupping on skerries
- Winter seabirds passage
- Divers and winter gulls
- Otters easier to see
- Aurora borealis
- Winter storms

Recommendations

The nature based assets of the Outer Hebrides could be exploited to increase shoulder month occupancy rates to the Scottish average.

4.7.2 Accommodation

Accommodation availability can be limited during the peak summer period, although this varies within the islands. An audit and review of bedspaces to identify future priorities by location and type is recommended, to help ensure that any increase in visitor demand can be met. It is particularly important for nature based tourism that the type and location of accommodation is linked to particular market segments and attractions. Closer networking between providers to deal with larger groups could address some accommodation shortages, but quality needs to be consistent.

Careful consideration needs to be given to any future accommodation provision to ensure that the viability of establishments is not threatened by over-supply during quieter periods. Identifying gaps will be particularly useful in determining applications for Challenge Funding, including SRDP and EU Structural Funds. New accommodation should be of high quality and exploit the uniqueness of the natural and built environment.

Market trends indicate that improved camping and RV infrastructure will generate future growth, and provision should match expanding demand. Upmarket serviced accommodation could also be expanded – especially where businesses attract new visitors to the islands through marketing and reputation.

Recommendations

- Innovative accommodation adapted for the climate and connecting people with the environment;
- Need for more camping provision and RV infrastructure.

4.7.3 Policy

Tourism should be integrated with wider economic development aspirations and policies, including the Local Development Plan for the Outer Hebrides and legislative processes concerned with the health and safety of visitors.

Recommendations

- Policies which favourably consider sustainable visitor facilities and help lengthen the season should be incorporated into CnES's Local Developments Plan;
- In producing the Local Development Plan, CnES should review tourism bedspace needs and distribution and put in place policies which encourage reuse of existing buildings – especially traditional and vernacular – for tourism use;
- Funding should be focused on developments which meet identified gaps in provision, both in type and geographical location
- In connection with the LRA 2003 and existing legislation governing land managers' duty of care, good practice should be followed.

4.8 Nature based tourism issues and recommendations

The following issues are more specifically relevant to nature based tourism:

4.8.1 Marketing

In times of financial constraint any proposals have to focus on where the greatest return can be achieved in the most cost effective way. It is our view that efforts should be concentrated on marketing, as the product is mainly already in place – although there are infrastructure and other issues which will be addressed below. Marketing takes many forms and we consider that non traditional marketing offers the best potential for least cost. The existing customer is the best promoter for the area.

There is a need to encourage the use of review and social networking sites. Tourism review sites such as Trip Adviser are already well used for the accommodation sector, but could be expanded to include reviews on attractions through the 'Things to Do' section. Businesses need to be more aware of this technology and informed on what visitors think about their product. A greater variety of these links, more densely populated with Outer Hebrides reviews, should be made to the VisitHebrides website and to relevant You Tube, Flickr and, more locally, Hebrides TV sites.

The VisitHebrides website should be redeveloped with opportunities for feedback, blogs, recent sightings and where to go. This site should become an important point of contact for visitors for feedback and comment. Constant up-dating is essential. Bird watching websites change by the hour as enthusiasts add sightings and even track individual birds.

Imagery is vital, and certain images are iconic. It is our view that these images and certain species should be used in branding and reinforcing the environmental qualities of the islands. This 'wow' effect can be used in innovative ways at a wide range of locations, including bus stops, public notice boards etc, and these images will constantly re-affirm how outstanding the natural assets of the Outer Hebrides are for visitors (and locals).

That the environment is the area's principal asset has to be constantly reinforced within the community and the business sector. Opportunities for joint promotion at relevant events should be taken and iconic imagery used effectively. The International Adventure Travel Conference scheduled for September 2010 in Aviemore is an opportunity to

showcase nature based tourism in the Outer Hebrides. In tandem with networking, it is recommended that a funded senior development post should focus on marketing, and especially the web portal – ideally recruiting someone with cutting edge private sector tourism experience.

Recommendations

- Visit Hebrides taken forward as a Web 2 portal by suitably experienced staff;
- Develop the Outer Hebrides presence on review and social networking sites, particularly where this is directly relevant to tourism, eg Trip Adviser;
- Visit Hebrides website should incorporate social interaction and user generated content;
- Focus marketing on iconic imagery of landscape and key wildlife species;
- Regular collection and dissemination of market intelligence;
- Encourage collective attendance at key promotional/media events;
- Pursue TV opportunities such as Coast, Spring and Autumn Watch, and on BBC Alba.

4.8.2 Networking

It is clear that many of the area's visitors seek a mixed product of wildlife, landscape and culture provided to a high standard. Networking throughout the islands and between sectors appears to be poor, limiting the visitor's product knowledge and cross-selling. In tandem with marketing, it is recommended that the senior development post should also focus on networking. This should not be limited to the nature based sector, but should include accommodation, arts/crafts, catering, transport and VIC staff. The basis for this post would be a commitment to address change management, measurement and evaluation, and boost public and private business leverage and partnership for continuous improvement.

The product needs to be more accessible, and immediate gains could be made through VICs and accommodation providers having better knowledge of what guides and boat trips offer and cost, and enabling the visitor to book through these outlets. There is also the need for better information on opening times. Further developments could address the lack of complementary itineraries and ultimately provide a central booking system. This would increase the availability of impulse 'short notice' guided walks and trips, with guides connected by a central booking system, email and mobile phone.

Other tourist destinations have fostered joint working through awards and social gatherings (recognising excellence), as well as through more formal familiarisation and training trips and come and try days organised for those in the tourism sector – especially accommodation providers. Accommodation providers should know their product and appreciate that the more knowledgeable they are about the range of experiences and activities in the Outer Hebrides the more their guests are likely to enjoy their visit. Learning journeys to areas demonstrating best practice have proved productive in other areas.

There is a need for improved links between arts and craft providers and nature based tourism providers. The aim should be to provide an affordable range of products for visitors to take home or purchase through the internet as a reminder of the natural

heritage of the Outer Hebrides. The development of a trade association such as a 'Creative Hebrides' grouping could encourage such links.

There is also potential for better networking to develop day trips from Skye. There are currently possible only on Saturdays with the Summer Timetable, offering five hours on North Uist and over eight hours on Harris. On a larger scale, the potential for more packaged products should be investigated.

Recommendations

- Product knowledge and cross selling encouraged
- Networking and training taken forward through the work of a dedicated officer
- A business barometer survey boosting the confidence of local providers
- Improved information on opening times
- Work towards complementary itineraries
- Encourage development of relevant environmental art and craft products for sale
- Investigate potential for day trips from Skye and an increase in packages

4.8.3 Infrastructure

There is a need for particular infrastructure improvements for tourists that would also benefit local communities. Camping and RV places, with watering and waste disposal facilities, are needed, as is the general provision of public toilets and wet weather options. These improvements are needed to serve an increasingly demanding market.

Wildlife Boat Trips

Recent local developments have shown the potential for visiting the island group of St Kilda, and there is potential for other island groups to be accessed more frequently. The Shiants, Mingulay, Berneray and Pabbay, the Flannans and the Monachs all have significant bird colonies and outstanding landscape qualities. The Outer Hebrides offer opportunities to enjoy coastal and island scenery of the highest quality and, except for during particularly poor weather, boat trips can be enjoyed throughout the year, particularly in the shoulder months. The trip can be enhanced with local insights from the skipper and through adding value, at no great expense, through offering local products to eat or drink. Investment in underwater camera equipment can enhance a boat trip and this is now relatively inexpensive. Operating to their existing codes of conduct, there is little evidence that current business activity is adversely affecting conservation.

There is evidence that these boat trips are popular with local people, and whilst this does not add to the tourism economy directly, it increases their understanding of the local nature based tourism product. The success of the Island Book Trust island visits and the demand for 'red-letter' trips illustrate the opportunity.

Further opportunities are provided by the presence of dolphins, seals and basking sharks, all of which are attractive to most visitors. These species should always be approached within an appropriate code of conduct – this is expected by the customers and should be used as a positive selling point.

Experience from other island groups demonstrates the benefits from using purpose-built vessels for wildlife watching, with good access for older and disabled people onto the boats.

For the independent traveller, there is need for improved boat launching facilities and secure trailer storage.

Classic Viewpoints

The Outer Hebrides has a diverse and outstanding landscape, and visitors should be informed of the best opportunities for these views. Viewpoints can offer a high certainty of seeing wildlife. Such an approach will disperse visitors throughout the islands and take them off the main spinal road. This requires identification of locations that are representative of the full range of island landscapes. These localities will require some additional parking, signage and waymarking.

Accessible Countryside

Our consultations reveal that new visitors often struggle to orientate themselves and to find walks and beaches, with some intimidated by remote landscapes and a general lack of services. All promoted paths and main beach access points should be adequately signed and waymarked.

Hebridean Wildlife

It is recommended that more opportunities are provided for watching wildlife on land. Wildlife is relatively plentiful, if you know where and how to look, but for many independent visitors, without fieldcraft skills, wildlife watching can be something of a lottery. Improving the likelihood of successful wildlife watching should be a priority.

This could be achieved in part through encouraging existing businesses to develop facilities for their guests, ranging from bird feeders to purpose built hides.

Wildlife facilities could be hired out to other visiting groups to generate income. Elsewhere in Scotland, hides have moved on from being draughty uncomfortable sheds to the quality and comfort offered by picture windows, padded seating and refreshments, with the potential to gain commercial value from the visitor experience. Vehicles can be ideal mobile hides, and some mainland businesses offer hamper picnics, night viewing with spotlights, and bat detecting trips. Locations that offer opportunities to enjoy sunsets and views in comfort should be promoted and redundant traditional buildings utilised.

There is potential to develop CCTV coverage for sea eagles at Ravenspoint. This should be encouraged as it would raise the profile of this iconic species on the islands and provide a destination for visitors, together with merchandising opportunities.

Field Sports and Golf

The Outer Hebrides provide outstanding opportunities for field sports and traditional links golf. There is a perception amongst many that these activities are 'elitist' whereas these opportunities can be made more widely available, for example, through cheap 'hill loch' brown trout fishing, shore based sea angling and even stalking. Joint working between

the community owned estates and local tourism businesses could promote these assets, as well as the unique relationship between the communities and the environment. Offering permits and permissions as part of an accommodation booking would encourage more active involvement. The extent of community land ownership is not widely appreciated by visitors, and an emotional connection could be established between the visitor and the special qualities of the Outer Hebrides with greater awareness of this.

Recommendations

- There is a general need for improved camping, RV and public toilet provision;
- Encourage the development of new wildlife boat businesses. These should focus on the needs of the wildlife watcher and provide access opportunities for the less mobile;
- All businesses should operate to recognised codes of conduct;
- Improve facilities for boat launching and trailer storage;
- Identify key viewpoints and promote a network of these;
- Ensure all key locations have adequate off road parking, signage and waymarking;
- Ensure all promoted paths and beaches are adequately signed and waymarked;
- Encourage the development of new wildlife watching opportunities;
- Encourage joint working between community land owners to promote field sports, golf, etc.

4.8.4 Information/Interpretation

A recurring issue is information on where to go and what to do. Recognition that the natural heritage and its enjoyment is the key selling point of the area means that more effort is required in connecting the visitor with these assets. This could be achieved in a number of ways.

Gateways

Every opportunity should be taken to inform and inspire the visitor before they set foot in the Outer Hebrides. This can be achieved through providing bespoke racking for leaflets at ferry terminals and airports, which should be regularly replenished. Providing print material and posters on Calmac ferries could provide an invaluable introduction for the visitor to the nature of the islands.

Visitor Centres Promoting Nature

The options for providing more visitor orientation are to utilise:

- Stand alone centre(s)
- Multi use centres
- Seasonal low key facilities

Each of these has advantages. The most promising opportunity currently is within Stornoway Town Hall, and it is recommended that displays and promotion within this

building focus on the visual impact of the landscape, its diversity and the wildlife present in the Outer Hebrides as a means of dispersing visitors throughout the islands.

Opportunities should be taken within other existing and new centres (eg in Tarbert) to incorporate material about the local landscape, key viewpoints and wildlife. There is also potential to develop small scale interpretive provision at catering and craft outlets (when these are open), thus providing information about local opportunities for walks, views and wildlife watching. There are also opportunities to provide information to the visitor at key locations such as the Butt of Lewis and Tiumpán Head.

It is not recommended that a single new nature visitor centre is developed as this would risk being divisive and not address the needs of all visitors.

Information Provision

There are a wide range of high quality publications on the islands' wildlife and it is important that these are readily available to the visitor. There is a gap in provision in telling visitors what can be seen and when. A nature calendar would help to highlight the opportunities available in the shoulder months, and this could be promoted on the Visit Hebrides website.

Guide Provision

Liaison with guides active in the area reveals that at the peak of the season there are not enough trained and competent local guides available to meet demand. This deficiency is constraining development of the sector and should be addressed. New entrants with language skills would strengthen the area's product.

Recommendations

- Develop bespoke leaflet racks for installation in transport terminals;
- Provide visually stunning landscape imagery within proposed developments in Stornoway and Tarbert;
- Build upon existing visitor attractions, with locally focussed interpretation introducing opportunities for classic views, walks and wildlife watching;
- Encourage and support businesses to develop hides that can be hired out to visiting groups, with a good distribution of facilities through the islands;
- Support CCTV coverage of sea eagles at Ravenspoint;
- Ensure existing publications are well distributed throughout the islands and available for visitors;
- Develop a nature calendar highlighting watching opportunities, and promote this on the website;
- Encourage training provision for new guides, if possible including language skills.

4.9 Priority recommendations

We have identified a range of recommendations, and it is clear that in times of financial constraint these require to be prioritised. To meet the overall objective of increasing the contribution that nature based tourism makes to the economy of the Outer Hebrides, market development is the main priority, with product improvements

geared to enhancing the nature-related experience of the visitor, and providing complementary facilities to give the visitor a memorable holiday. Successful marketing will entail:

- Encouraging existing visitors to return;
- Encouraging existing visitors to recommend the Outer Hebrides to others;
- Attracting new visitors;
- Increasing the spend of existing visitors through longer stays and increased spending opportunities.

The following key recommendations and targets have been highlighted.

- Increase shoulder month occupancy rates to the Scottish average;
- Make the VisitHebrides website a more outward facing portal, through appointing a specialist in tourism Web 2 applications;
- Focus on key nature based assets that offer the most potential to support tourism growth;
- Encourage businesses to work in partnership to take recommended opportunities forward.

4.9.1 Suggested prioritisation for an Action Plan

High Priority

Policy

- Policies which will improve sustainable visitor facilities and help lengthen the season should be incorporated into the Comhairle's Local Developments Plan.
- In producing its Local Development Plan, CnES should review tourism bedspace needs and distribution and put in place policies which encourage redevelopment of existing buildings – especially traditional and vernacular – for tourism use.
- Funding should be focused on developments which meet identified gaps in provision, both by type and geographical location.

Accommodation

- More camping provision and RV infrastructure is required.
- Additional accommodation capacity of the quality that will attract different segments of the nature tourism market is required where this will not saturate supply in local areas. This should include extensions of existing successful businesses as well as new entrants who will, through their own marketing and reputation, attract new visitors to the islands.

Networking

- Improved product knowledge and cross selling by operators should be encouraged.
- Networking and training should be taken forward by a dedicated officer.
- A business barometer survey to help providers to monitor and benchmark their performance should be trialled.

- The visitor should be given better information on opening times.

Infrastructure

- There is a need throughout the islands for improved camping, RV and public toilet provision.
- Key viewpoints with capacity to attract more visitors should be identified and promoted as a network.
- All key locations should have adequate off-road parking, signage and waymarking.
- All promoted paths and beaches should be adequately signed and waymarked.

Information/Interpretation

- Leaflet racks should be installed in transport terminals and regularly re-stocked.
- Visually stunning landscape imagery should be prominent within proposed developments in Stornoway and Tarbert.
- Existing publications should be well distributed throughout the islands and available for visitors.
- A nature calendar highlighting watching opportunities should be developed and promoted on the website.

Medium Priority

Accommodation

- Innovative accommodation development adapted for the climate and connecting people with the environment should be encouraged.

Networking

- Co-operation between operators in different parts of the islands should provide advance itineraries for visitors.
- Environmental art and craft products should be well promoted to visitors by other businesses.

Infrastructure

- The development of new wildlife boat businesses should be encouraged, with access for the less mobile.
- All businesses should operate to recognised codes of conduct.
- Facilities for boat launching and trailer storage should be improved.
- New on-shore wildlife watching opportunities should be developed.
- Joint working between community land owners should be encouraged to promote field sports, golf, etc.

Information/Interpretation

- Make use of existing and new visitor attractions, with locally focused interpretation identifying opportunities for classic views, walks and wildlife watching.
- Encourage and support businesses to develop hides that can be hired out to visiting groups, with a good distribution of facilities through the islands.
- Support CCTV coverage for sea eagles at Ravenspoint.
- Encourage training provision for new guides, ideally including language skills.

Market Development

- Investigate the potential for day trips from Skye and an increase in packaged holidays.

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Appendix 1:

Outer Hebrides Accommodation Occupancy Rates (figures provided by VisitScotland)

Sector	Area	Occupancy (%)									
		Jan/Dec 07/08	March 2008	April 2008	May 2008	June 2008	July 2008	Aug 2008	Sept 2008	Oct 2008	
Hotels (room)	Scotland	64	58	61	69	72	71	78	73	66	
	Outer Hebrides	52	46	39	68	72	72	66	63	42	
Guest House / B&B (room)	Scotland	46	35	37	56	60	66	73	59	45	
	Outer Hebrides	33	22	25	53	60	67	55	39	13	
Self-catering (unit)	Scotland	52	40	48	63	67	76	83	63	55	
	Outer Hebrides	39	19	34	64	63	90	80	37	34	
		Jan/Dec 08/09	March 2009	April 2009	May 2009	June 2009	July 2009	Aug 2009	Sept 2009	Oct 2009	
Hotels (room)	Scotland	64	57	63	69	72	76	80	74	67	
	Outer Hebrides	52	40	48	73	79	78	75	72	52	
Guest House / B&B (room)	Scotland	46	33	43	60	64	69	77	61	41	
	Outer Hebrides	33	9	26	64	75	70	71	58	25	
Self-catering (unit)	Scotland	52	30	53	63	64	77	82	65	53	
	Outer Hebrides	39	8	48	65	73	87	88	61	24	

VisitScotland's visitor guide to the Outer Hebrides lists the following:

Events

Lewis Half Marathon	23 rd May
Benbecula Half Marathon	6 th June
Hebridean Challenge	4 th – 10 th July
Barra Half Marathon	4 th July
Harris Half Marathon	July
Lewis Golf Week	11 th -18 th July
Sea Angling Championships	July
Twin Peaks Hill Race	7 th August
Ben Kenneth Hill Race	2 nd August
Sea/Surf Kayak Symposium	Late August

Holiday Operators

Tours and Guides

Albannach Guided Tours (Lewis) www.albannachtours.co.uk
Tour Planning and Guiding Services

Western Isles Tour Guides Association
Trained guides available with invaluable knowledge of Western Isles

Out and About Tours www.hebridean-holidays.co.uk
Qualified Guide providing service to groups and individuals throughout the Western Isles.
Interpretation of landscape, cultural and natural history

Cruises

Island Cruising (Lewis) www.island-cruising.com
Wildlife, diving and birdwatching cruises around the islands, St Kilda a speciality

Seatrek (Lewis) www.seatrek.co.uk
2 hour family wildlife trips, St Kilda day trips

H Taylor (Scenic Cruises – Harris) www.scenic-cruises.co.uk
Wildlife, natural history, local history, fishing etc 'tailored to suit you

Kilda Cruises (Harris) www.kildacruises.co.uk
Kilda Cruises provides fast comfortable day trips to St Kilda and other remote islands

John Mackay (Taransay) www.visit-taransay.com
Day trips to Island of Taransay

Barra Fishing Charters www.barrafishingcharters.com
View the magnificent cliffs of the Barra Head Islands and experience sailing through the natural arch on the west side of Mingulay

The Hebridean Explorer www.thehebrideanexplorer.com
Private tours from Inverness for up to 5 people for 1-10 days

Sea Harris

www.seaharris.co.uk

Fast comfortable day trips to St Kilda, Shiantis and other islands. A must for wildlife and birdwatching

Activities

Outdoor Hebrides list guides and instructors, under the individual activities and also has links to a wide range of general activity websites.

Surfing

Lewis Surf Trek and Uist Outdoor Centre. Holidays through Hebridean Surf Holidays
Kite surfing – Western Isles Kite Company and Barra Power Kiting

Kayaking

Clearwater Paddling provides guided sea kayaking trips and exploration in Barra
Stornoway Canoe Club is happy to welcome visitors
Adventure Hebrides offers assistance in planning canoeing trips
Canoe Hebrides offer Kayaking holidays of a lifetime to St Kilda
Scaladale Centre – residential centre
58 degrees North – outfitting company

Sailing

Sailing the Hebrides lists the following mooring locations: Castlebay; Acarsaid, Eriskay;
Lochboisdale; Kallin; Lochmaddy; Berneray; Rodel; Miavaig; Stornoway

Climbing

Sgor – company specialising in climbing and abseiling
Seatrek offer access to sea stacks and cliffs
Uist Outdoor Centre do rock climbing and abseiling around North Uist
Scaladale Centre on Harris also offers this activity

Running

Lists a range of half marathons, Stornoway, Benbecula, Barra, Harris and Hill Races on Beinn Lee and Beinn Mhor

Hebridean Challenge

The Hebridean Challenge is a relay race using only human power to negotiate a course of up to 700 km in the Outer Hebrides of Scotland..... is aimed at people who consider themselves to be fit, and competent at navigating in the outdoors. As one recent competitor put it, "the best qualification for this event is a love of wild places."

Not only are the islands wild, remote and beautiful, they also provide unique physical and logistical challenges due to the varied terrain, which ranges from rocky hills, rough grass and heather, huge white beaches and myriad small, and not so small, lochs and lochans. Nearly all of this terrain is open to competitors travelling on foot and as there are few paths, route choice is almost limitless.

<http://www.hebrideanchallenge.com>

Wildlife – only business listed is Island Cruising on Lewis, but James MacLetchie also provides guiding in the Uists. There are ranger services on Galson Estate and North Harris

Appendix 3:

Outer Hebrides – Sporting Opportunities

(Sources CKD Galbraith Sporting Lets 2010 season, FishHebrides.com and Who Owns Scotland)

Property, Fishery Business	Area acres	Fishing	Stalking	Bird Shooting	Accommodation & Indicative cost
Amhuinsuidhe		6 rivers and 9 lochs Salmon and sea trout 140 salmon 500 sea trout – 10 year average	Stalking over 35,000 acres 30 stags	Walked up Grouse	Castle accommodation for up to 18
Aline	8,000	4 rivers Salmon (94 August 2007) and sea trout	Stalking over 28,000 acres	Walked up Snipe, Woodcock (120 per season) Duck, Grouse	Lodge and cottage accommodation for up to 16
Barvas	34,600	1 river and 1 loch: Salmon/grilse (175 - 5 year average)			
Borve Lodge		1 river 2 lochs Five year average: 43 salmon/grilse and 43 sea trout			
Carloway	11,400	5 year average catch: 10 salmon and grilse. Sea trout rare, brown trout very numerous in lochs (unrecorded)			
Creed		Five year average: 190 salmon/grilse and 280 sea trout			
Eishken	43,000	1 river and 5 lochs Salmon and sea trout. Access to fishing over 67,000 acres	Stalking over 43,000 acres	Walked up Snipe, Woodcock, Duck, Grouse	Lodge accommodation for up to 14
Finsbay		The combined 5 year average catch for the 100 Loch Fishings which comprise Finsbay, Flodabay and Stockinish is 5 salmon/grilse, 44 sea trout &			

		124 brown trout.			
Garynahine	11,400	1 river and many lochs Salmon (120 – 5 year average)	Limited stalking	Walked up Snipe, Woodcock (76 one day in 2005), Duck, Grouse	Lodge accommodation for 12 £2725 - £4355 per week
Gress		Five year average: 21 salmon/grilse, 119 sea trout & 46 trout.			
Grimersta		Five year average: 412 salmon/grilse and 67 sea trout			Lodge accommodation 8 rods £1450 -£1800 per week
Laxadale		Approximate 5 year average 20 salmon 2 lochs			
Morsgail	14,000	1 river two lochs with boats Salmon, sea trout and brown trout 40 salmon/ grilse, 39 sea trout – 5 year average	5 stags per week		Lodge accommodation for 12
North Uist Estate	62,200	Five year average: 21 salmon/grilse, 197 sea trout & 2579 brown trout 700 - 800 lochs	Stalking	Walked up Snipe, Woodcock Duck, Geese	
Obbe		Five year average: 57 salmon/grilse, 115 sea trout (not including finnock) and 547 brown trout			
Scaliscro	10,100	11 lochs with boats Salmon, sea trout and brown trout	Limited stalking	Walked up Snipe, Woodcock Grouse	Lodge accommodation for 23 From £2000 per week
Soval	39,000	Five year average: 121 salmon/grilse, 76 sea trout & 800 brown trout	Limited stalking	Walked up Grouse	Lodge
South Uist	92,000	Five year average: 65 salmon/grilse, 572 sea trout & 1408 brown trout	Stalking	Walked up Snipe, Woodcock Duck, Geese	Lodge accommodation for 16

Uig Lodge and Fhorsa Fishery		1 river 2 Five year average: 97 salmon/grilse, 24 sea trout and 237 brown trout	Stalking on neighbouring estate	Shooting on neighbouring estate	Lodge accommodation for 15 From £5200 per week
Uig & Hamanavay	50,000	2 rivers and 4 lochs Five year average: 77 salmon/grilse, 201 sea trout & 583 brown trout	40 stags and 30 hinds	Walked up Snipe, Woodcock Grouse	

Appendix 4:

Examples of artists and crafts people whose work is inspired/influenced by the natural environment of the Outer Hebrides

- Dave Greenall (<http://www.greenalldellstudio.com>) - captures the vast expanses of moorland and peat bog in the north of Lewis
- Anne Campbell - Bragar area (<http://www.artistsagainstwindfarms.com/annecampbell.html>)
- Derek Scanlan and Simon Rivett (<http://www.simonrivett.co.uk/>) – the cliffs and sea stacks of Uig and the West side
- Ros Borland - wildlife artist (<http://www.rozisgallery.com/>)
- Margaret Fenton or Jac Volbeda (<http://www.jacvolbeda.co.uk/productssimple2.html>) – Uist based work including the expansive beaches
- Bill Neill (<http://www.william-neill.co.uk/>) and Margarita Williams focus on the detail of birds and flowers
- Willie Fulton - Landscape painter, Harris area (<http://www.williefulton.com/>)
- Ruth O'Dell (see Dave Greenall above) and Anne Campbell look at the crofting environment, the domestic animals and wild life that it supports.
- Dawn Susan, craft maker, Hebridean Baskets (<http://www.thewesternisles.co.uk/baskets.htm>)
make work from materials grown on her croft using indigenous craft skills.
- Allison Macleod - Tiger Textiles (<http://tigertextiles.moonfruit.com/>)
incorporates wild flora and fauna into her contemporary textile designs.
- Margarita Williams – Harris area – water colour landscapes and wild flowers (<http://www.holmasaiggallery.com/>)
- Virtual Yarns (<http://www.virtualyarns.com/>) dye wool in colours which reflect the landscape - their website contains many environmental references
- Scalpay Linen (<http://www.scalpaylinen.com/>) spin wool from their own sheep.
- Breanish Tweed (<http://www.breanishtweed.co.uk/>)
- Nicky Cowsill's ceramics contain imprints of shells and other objects found on Hebridean beaches.
(http://www.lanntair.com/component/option,com_contact/task,view/contact_id,15/Itemid,0/)
- Ian Brady – sculptor – often uses imagery of wild birds
- James Smith- photography (<http://www.oisevalgallery.co.uk/>)
Helen Alexander (<http://www.hebart.co.uk/>) makes hand and machine - embroidered landscapes inspired by the north of Lewis.
- Flora Macdonald (<http://www.calanas.co.uk/page6.html>) in the Uists runs courses in dying fabrics and wool from natural materials
- Elsie Mitchell - making a handmade paper map of Mangursthadh township and common-grazings from grasses and dockweed, exploring the cultural history of the area and current environmental designations for coastal heath, species rich grassland.

List of consultees asked 5 questions. (Section 3.9.1)

The people spoken with were as follows:

Guides and Outfitters

Chris Ryan – Out and About Tours, Lewis
Steve Duffield – Western Isles Wildlife, Uist
Chris Denehy – Clearwater Paddling, Barra
Ian Leitch – Lewis Fishing Guide
Joan Morrison (Sec) – Western Isles Tour Guides
Duncan MacPherson – North Harris Estate
George MacDonald – North Uist Estate

Boat Operators

Murdo MacDonald – Island Cruises, Lewis
Angus Campbell – Kilda Cruises, Harris
Murray MacLeod – Seatrek, Uig

Accommodation

Amanda Leveson Gower – Langass Lodge
Angus MacLeod – Hotel Hebrides, Harris
Graham MacLennan – Hebridean self catering, Lewis

Transport

Mike Bull – North Uist

Arts and Crafts

Debbie Cullis – Island Arts Lewis
Anthony Barber – Harbour View Gallery, Lewis
Willie Fulton – Cottage Gallery, Harris

Off Island

Paul Easto – Wilderness Scotland

Additionally, the following were contacted and their views sought on sources of information and general comments:

Neil Campbell – Chair, Outer Hebrides Area Tourism Partnership
Ian Fordham – Outer Hebrides Tourism Industry Association
Meg Rodger – Comhairle Arts Development Officer
Elsie Mitchell – Comhairle Crafts Development Officer
Torquil MacLeod – Harbour Master

Quotes from Operators

- You either love it (the landscape) or hate it. If you love it you really love it.
- Some new customers in 2009 'didn't get it' (about the landscape)
- My customers come on holiday rather than a training course
- The public sector does not help smaller businesses in a small way, you have to be very big to get help
- I have discerning customers who are here for a reason
- I had to plough my own furrow in setting up my business
- Marketing must be more slick
- Plenty of talking shops, little real infrastructure to help
- Visitor centres have to be places that work
- Outer Hebrides are one of the great unsold experiences anywhere in the world
- Accommodation has to connect people with the place they are in
- Winter perceptions of the Outer Hebrides are off putting for customers
- After they have been on my boat, customers ask me ' what do we do in the afternoon?'
- We are just scratching the surface of culture, music and literature
- I operate at a loss in the winter just to keep staff
- We are miles behind in terms of wildlife tourism
- There is no one to complain to in the CNES and only one person in the tourism section
- VIC staff are not confident about what they are trying to sell
- There is a lack of information about specific sites and where you can experience specific species
- Fishing is second to none
- There are limitations to the resource itself (fish, wild birds for shooting)
- Private sporting estates are very much a business
- Gamekeepers may not have the personality or inclination to deliver wildlife tourism successfully

Brief descriptions of main landscape types in the Outer Hebrides

Crofting

- Crofting 1

Describes settlements where crofts sit on open, exposed moorland edges and sweep down to the sea, and the strips are very linear and uniform.

Location:- North Lewis – coastal strip Bragar to Ness and Tolsta to Stornoway and east to Point.

- Crofting 2

Describes crofting landscapes which have a linear field pattern imposed on a more complex landform of rocky or Boggy Moorland.

Location:- Bragar to Callanish and North and South Lochs

- Crofting 3

This has an irregular field pattern on complex landform adjacent to Knock and Lochan, Rocky Moor and Mountain Massif.

Location:- East of Harris and east coast of North Uist

- Crofting 4

Occurs only in the Uists and is characterised by large rectangular field patterns on a very flat landform studded with lochs. The horizontal scale is large.

Location:- West coastal strip of Uists and Benbecula

Machair

Machair is found along the west coast of the islands created on shell sand blown inland. It is characterised by sandy beaches and low headlands backed by dune systems which protect expansive areas of Machair grassland. These areas are a focus of agricultural activity.

- Machair 1

Describes the type of simple landscape found in the Uists, of fairly flat, extensive grassland with settlement kept to the landward fringes, protected by linear dune systems and very long, sweeping sandy beaches.

Location:- Berneray, North Uist and coastal strip down South Uist

- Machair 2

Describes dune systems and beaches which are more complex and of a more intimate scale surrounded by rocky headlands. Settlement is often dispersed throughout the Machair grassland which is less extensive and more influenced by rocky landform.

Location:- Uig, West Harris, Eriskay, Barra and Vatersay

Boggy Moorland

Describes large scale undulating peat moorlands interspersed with numerous lochans which cover large parts of the Outer Hebrides, particularly Lewis and the Uists. Predominantly uninhabited, it is a simple landscape of few elements with an upland, remote character.

- Boggy Moor 1

Where lochans are occasional rather than a main feature.

Location:- North Lewis – most of landward area north of A858 Stornoway – Garynahine.

- **Boggy Moor 2**

Where lochans are numerous creating a strong patterning, and interplay of land and water with reflective effects.

Location:- North and south of Tolsta and south and SW of Achmore

- **Rocky Moorland**

Irregular topography of rocky knolls interlocked with peaty moorland vegetation and occasional small lochans. There is considerable diversity of form and texture. Predominantly uninhabited, with occasional croft houses in coastal locations often with a small natural harbour.

Location:- Central strip across Lewis – Uig to Lochs, North Harris and north and east Uist. Central spine of South Uist and east Barra

- **Knock and Lochan**

A complex landscape of irregular knocks (massed boulders on bedrock outcrops) interspersed with small lochans. Sparsely vegetated and predominantly uninhabited. Where it meets the sea there is a coastline of rocky promontories, small bays and off shore skerries.

Location:- Bernera, East Lewis and East Harris

- **Rock and Lochan**

Distinct from Knock and Lochan mainly in the amount of bare rock visible and the north west/south east orientation of the patterning of rock formations and therefore of the lochans. The landform elements are smaller scale and flatter, being comprised mainly of low ridges. It is uninhabited apart from some coastal settlement and has a distinctive, almost lunar character.

Location:- South east Harris

Mountain Massif

- **Mountain Massif 1**

Encompasses nearly all the mountainous areas in the Outer Hebrides. The lower, rounded, shouldered peaks or ranges which rise gradually from the surrounding landscape.

Location:- South Lewis, South and west Harris, east of south Uist and west Barra

- **Mountain Massif 2**

Distinct area in South Harris due to the amount of bare rock. This is related to the Rock and Lochan area and combined they give an unusual 'lunar'

Location:- South Harris

- **Dramatic Mountain Massif**

Where mountains are more 'dramatic' because they rise suddenly from the landform or the sea, have an impressive scale or 'apparent scale' in relation to their surroundings or have distinctive and complex landforms.

Location:- West Lewis, North Harris, Toe Head, North Lee, Beinn Mhor and Heaval on Barra

Coastal Mosaic

There are some coastal areas along the eastern side of the southern islands which are quite distinct in character. An example of this is the area around Lochmaddy which has an intricate arrangement of sea lochs and fragmented land patterns gradually breaking up into small islands and skerries. Inland the influence of the sea is very evident in the colours of the marine flora which skirt the base of all the rocky shores around the lochs. Tidal markings are also very apparent.

Location:- East of North Uist and east Benbecula

Features of Interest from Designated Sites in the Outer Hebrides

Earth Sciences

Mineralogy of Scotland, Coastal Geomorphology, Quaternary, tertiary igneous

Habitats

- Reefs, subtidal sandbanks, shallow inlets and bays , saline lagoon, tidal rapids, maritime cliff, Lagoons, saltmarsh, mudflat, vegetated sea cliffs, sea caves, Atlantic salt meadows,
- shifting dunes with marram, dune grassland, machair, humid dune slacks,
- Blanket bog, depressions on peat substrates,
- Eutrophic, mesotrophic, dystrophic and oligotrophic lochs, upland machair, sand dune, acid peat stained lochs, clear water lochs with aquatic vegetation, valley fen, machair loch, open water transition fen, flood plain fen, springs, naturally nutrient rich lochs,
- wet heathland, scrub, subalpine dry heath, montane acid grassland, subalpine wet heath, dry heaths, acidic scree, alpine and boreal heaths, plants in crevices on acid rocks,
- lowland mixed broadleaved woodland, mixed ash woodland,

Species

Mammals

Grey seal, Otter

Birds

- Greenland barnacle goose (non-breeding),
- Greylag goose (breeding and non breeding),
- Mute swan,
- Guillemot, razorbill, puffin, fulmar, kittiwake, shag,
- Gannet, great skua, storm petrel, Leach's petrel, Manx shearwater,
- black guillemot, little tern, common tern, great black backed gull,
- Corncrake, redshank, golden plover, turnstone, ringed plover, oystercatcher, sanderling, purple sandpiper,
- Dunlin, black throated diver, red throated diver, merlin, golden eagle, greenshank,

Plants

Stonewort, slender naiad

Fish

Salmon

Invertebrates

Brackish water cockle

Freshwater pearl mussel

Appendix 9:

Outer Hebrides identified sites for wildlife viewing

	Wildlife Hebrides	SNH	RSPB	OH Bird Recorder
Stornoway castle grounds	X	X	X	X
Loch Branahuie	X	X	X	
Tiumpan head		X	X	X
Tong and Steinish	X	X		
Coll	X	X		
Gress	X	X	X	
Garry	X	X	X	
Barvas Moor and Muirneag	X	X	X	
Barvas	X	X		
Loch na Muilne			X	
Butt of Lewis	X	X	X	
Loch Stiapavat	X	X	X	
Rona and Sula Sgeir		X		
Callanish	X	X		
Achmore	X	X		
Bosta, Great bernera	X	X		
Valtos and Reef	X	X	X	
Camas Uig	X	X		
Mangersta	X	X		
Flannan Isles		X		
Loch Orasay	X	X		
Pairc	X	X		
Ardhasaig and Bunavoneader	X	X		
North Harris Hills	X	X	X	
Husinish, Cravadale and Scarp	X	X		
Luskentryre and Seilibost	X	X	X	
Northton and Chaipaval	X	X	X	
Rodel	X	X		
Sound of Harris				X
E Coast Harris	X	X		
Shiants	X	X		
Berneray	X	X		
Benbecula Lochs				X
Lochmaddy and Loch an Duin	X	X	X	
Clachan Farm				X
Griminish Point				X
Langass				X
Balranald	X	X	X	X
Baleshare	X	X		
Monachs	X	X		
Benbecula	X	X	X	
St Kilda		X		
Ardivachar and Loch Bee	X	X	X	X
Loch Druidibeg	X	X	X	X
Howmore Estuary	X	X		

Loch Eynort	X	X		X
Rubha Ardvule	X	X	X	X
S Coast S Uist	X	X		X
Eriskay	X	X		
Traigh Mhor and Eoligarry	X	X		
Barra	X	X		
Vatersay	X	X		
Sandray, Mingulay, Pabay and Berneray	X			

Appendix 10:

Audit of Natural Heritage Assets in the Outer Hebrides

ASSET	Attraction/ Location	Current interest	Access	Facilities	Attractive - Ness	Total	Numbers
Scenery and landscape features							
Classic OH Viewpoints	Luskentyre	4	4	2	5	15	1
	Castlebay	4	4	3	2	13	2
Offshore islands	St Kilda	4	3	3	5	15	2
	Mingulay Pabbay Shiants	1	3	1	2	7	3
	Flannans Monachs	1	3	1	1	6	4
West Coast Beaches	Harris	2	2	2	2	8	2
	Uig/Valtos	4	2	2	2	10	3
	South Uist	3	2	2	4	11	
	Barra Eriskay Vatersay	3 4 1	2 2 2	2 1 1	2 2 2	9 9 6	
Headlands	Butt of Lewis and light house	3	4	2	2	11	2
	Tiumpan Head	2	2	2	2	8	2
	Tolsta Head	1	All 2	All 2	2	7	3
	Gallan Head	2				8	
Mangersta	3	9					
Rubha Ardvule	1	7					
Machair flora	South Uist, Barra Balranald (RSPB)	3 3	2	3	4	12 12	2
Peatlands	Lewis	3	1	1	2	7	2

Mountains and hills	Clisham Harris	1	1	2	4	8	3
	Beinn Mhor Hecla Eaval	1 1 1	All 1	All 1	2	5	4
	Heaval Barra	3	1	1	2	7	3
Northern Lights	All islands	3	4	1	1	9	3
Mammals							
Dolphins Whales Seals	Minch crossing	3	3	3	4	13	1
Basking Sharks	Boat trip	4	3	3	2	12	4
Otters	Coastal sites	3	2	1	4	10	3
Red Deer	North Harris	3	2	1	4	10	2
Birds - General							
Raptors Sea Eagles Golden Eagles	North Harris East Lewis North Uist	1 3	2	1	4	8 10	3
Geese	Uist Sound of Harris	1	2	1	1	5	4
Seabird Colonies	Off shore islands	3	3	3	4	13	3
Waders	Lewis peatlands	1	2	1	1	5	4
Birds - Specialities							
Corncrakes	Croftland Uists, Barra	1	2	1	2	6	3
Corn Bunting	Croftland	1	2	1	1	5	4
Red Necked Phalarope	Barvas	1	2	1	2	6	4
Insect Specialities							
Great Yellow Bumblebee	Machair	1	2	1	1	5	4

Fieldsports							
Stalking Red Deer	North Uist North Harris Aline	3	1	3	1	8	3
Game Fishing Salmon, Sea Trout, Brown Trout	All islands	3	2	3	5	13	2
Sea Angling	Boat and Coast	3	3	3	2	11	2
Rough Shooting Snipe, Woodcock, Duck, Geese, Grouse	Harris, Uists	3	3	2	2	10	3

Outdoor pursuits							
Coastal and low level walking	All	3	1	2	5	11	1
Climbing	Sea cliffs and stacks – Pabbay and Mingulay Harris – Sron Ulladale	1	1	1	5	8	4
Mtn Biking	Harris	3	1	2	1	7	3
Water Wave and Wind Sports							
Sea Kayaking	Coast	1	1	1	5	8	3
Surf Kayaking	West Coast beaches	1	1	1	2	5	4
Wind surfing	East Coast	1	1	1	2	5	4
Surfing	West coast Lewis and Uists	1	1	1	2	5	3
Body Surfing	West coast beaches	3	1	1	2	7	3
Kite surfing	As above	1	1	1	2	5	4

Power kiting	West coast beaches	1	1	1	2	5	4
Blokarting	West coast beaches	1	1	1	2	5	4
Diving	Coast – boat based	1	1	2	2	6	3
Events Heb Challenge	Outer Hebrides	1	1	3	2	7	3
Golf on traditional course	Askernish	3	1	3	5	12	2
Wildlife Cruises	Kilda Cruises, Tarbert Stornoway, Loch Maddy	4	3	3	5	15	2
Arts and Crafts Landscape painting and photography Jewellery Harris Tweed	Island wide locations	2	4	3	2	11	1
Food and Drink Seafood	Salar Smokehouse Shop Lochcarnan Hebridean Smoke house	2	4	3	2	11	1
Cockling	Barra beaches	1	2	1	2	6	4



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Statement of principles:

Scottish Natural Heritage – the government body that looks after all of Scotland's nature and landscapes, across all of Scotland, for everyone. Our 5 strategic priorities are:

- Caring for Scotland's nature and landscapes
- Helping to address climate change
- Delivering health and well being
- Supporting the Scottish economy
- Delivering a high quality public service

Find out more at www.snh.org.uk

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