

## **Executive Summary**

Dunvegan Community Council area is a 'very remote rural' and 'fragile' (by official designations) area at 57.4 degrees north, in the IV55 8 postcode. Its nominal area is around 27 square miles between Loch Dunvegan and Loch Bracadale, centred on Dunvegan. The inhabited part is much smaller, comprising 7 townships around 3-5 miles from the Village. The current population of DCC is around 650 - in c. 280 households - half living within the Village.

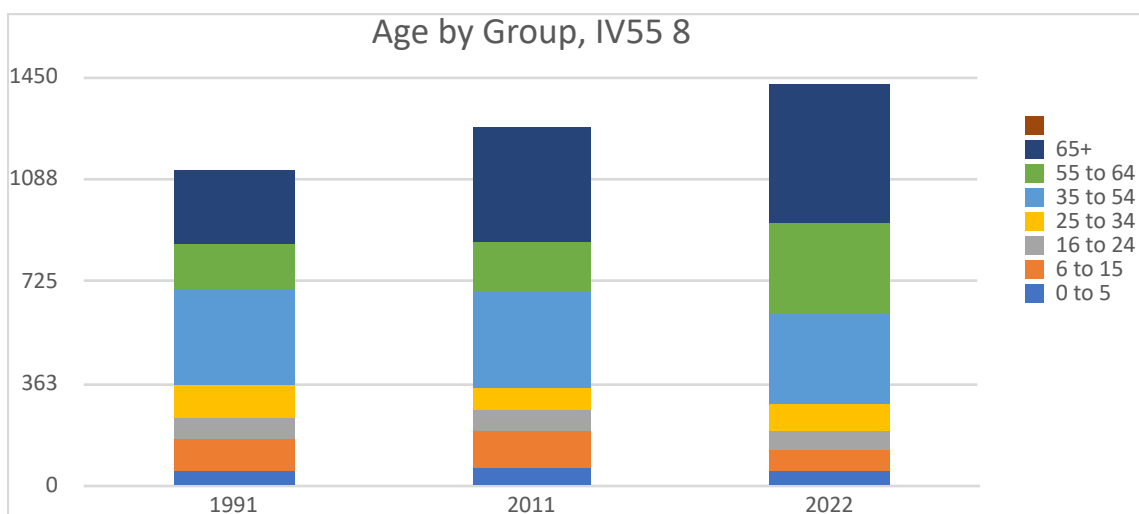
This Village is also the centre of the historic (and Civil) Parish of Duirinish, an area of c.100 square miles, with c.70 miles of coastline. Dunvegan continues to serve as such for the residents of Glendale (max. 10 miles by road) and Waternish (max. 11 miles) plus the Struan area to the south (max 9 miles). Within this wider area of c. 1,500 people, the only primary school, public transport terminus and medical centre is at Dunvegan. In addition to public services, Dunvegan also hosts NW Skye's only garage, only fuel station, and 3 of 5 grocery shops.

Dunvegan centre is 21 miles from the nearest nationally-defined village, Portree, c.2,500 people. It is therefore closer to Lochmaddy on North Uist (19 miles). There is one public bus route east from Dunvegan Village to Portree - 4x daily not Sundays - with no non-school buses north, west or south. Nevertheless, this area receives hundreds of thousands of UK and international visitors every year (c.370,000, accommodation for 70,000 person-nights) being home to famous sites including Dunvegan Castle, Coral Bay and the only road to Neist Point and the Three Chimneys Restaurant.

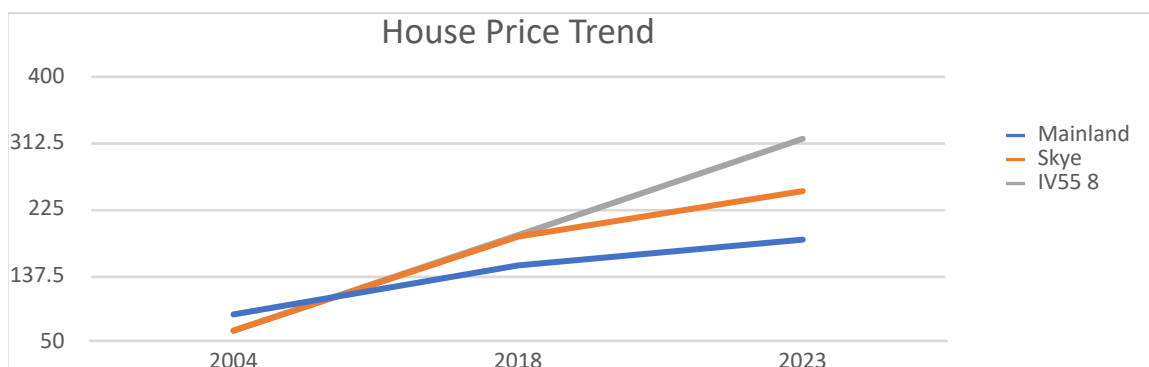
The majority of all land in DCC is owned by MacLeod Estates, under crofting tenure, while a small crofting area to the north is owned by the Scottish Government, and larger 'wild' areas to the west by Highlands and Islands Enterprise and the common-owners of the Glendale Estate. While the Highland Council's WestPlan (2019) zones

11 sites around the Village for housing and other development, it has now used one, and only one other has ever been on the market. The remaining 9 are owned by MacLeod Estate, who also, unusually, own all the foreshore/sea access (elsewhere Crown Estate).

Like the rest of the Isle of Skye, the resident population of DCC has risen somewhat in the 21<sup>st</sup> century. However, census data indicates that this rise is wholly in over 55s. The population of children, young people and middle-age adults has fallen.



The average house price in DCC 2022-24 (n.18) was £262,000, compared to a Skye median of £249,000, and island/mainland medians of £184/£185k in 2023. (The average price across IV55 8 was £339,000.) With average wages remaining around £26,600 (vs UK £31,100) and costs of living exceptionally high due to distance premiums, this is an obvious issue.

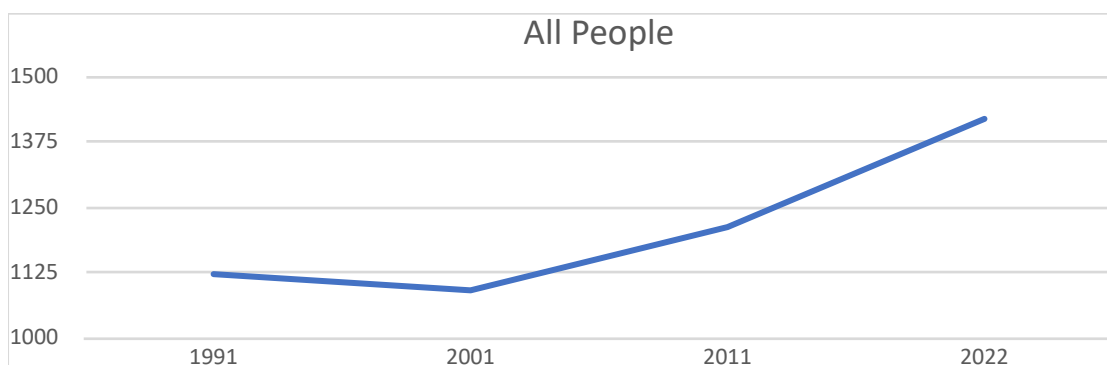


Within Skye (and the Highlands & Islands overall) the IV55 8 area is unusual in offering high levels of freehold land, not subject to crofting tenure. It was therefore unusually open to second homeownership from the start of Skye’s burgeoning appeal to tourists: even in 1991, 19% of houses in IV55 8 were holiday homes. Though this tenure does not apply in DCC, it has nevertheless affected the area, as current average prices show.

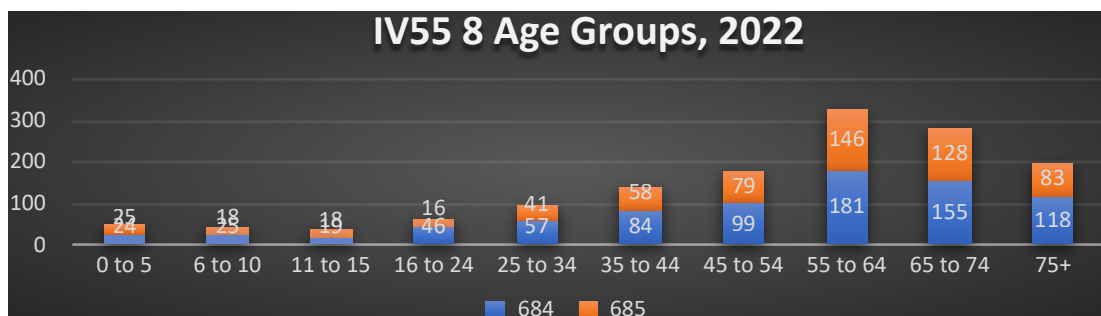
As well as being the in-practice catchment for all Dunvegan-based services, the wider IV55 8 area is significant because (on every measure for which figures can be localised) DCC’s township communities more closely resemble neighbouring Waternish or Glendale than they do the Village.

**Contents: Population Data; Traffic Data; Business & Short-term Lets Data**

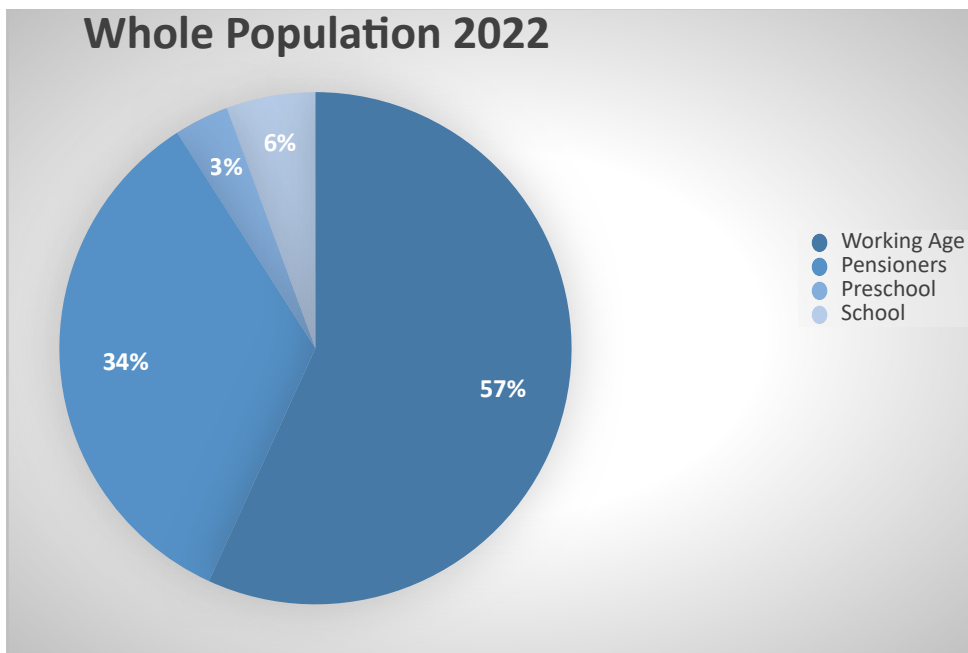
**Population Data**



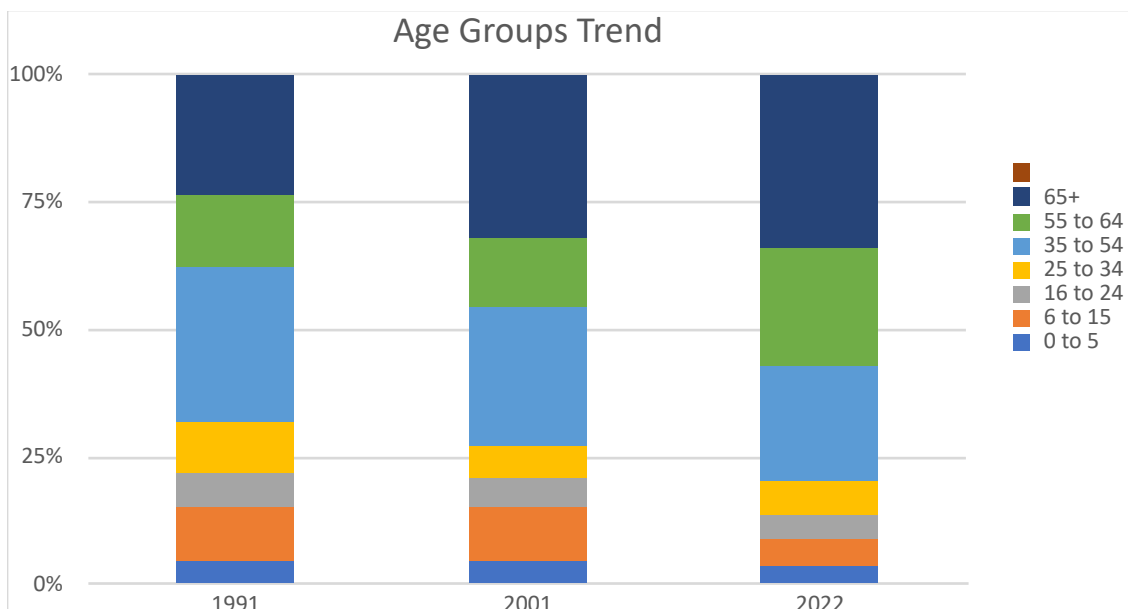
Overall, the population of IV55 8 is rising. However, the largest age group currently is 55 to 64 years old, all pensioners by 2035.



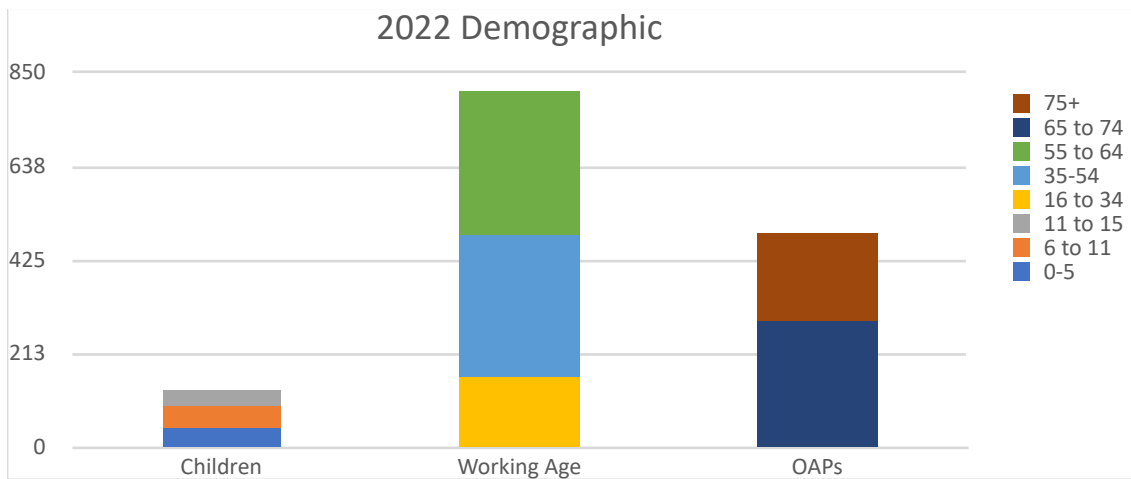
Census data also shows that the number of school age children (80) is just a fraction of those needed to replace these 300+ people moving out of the workforce by 2035.



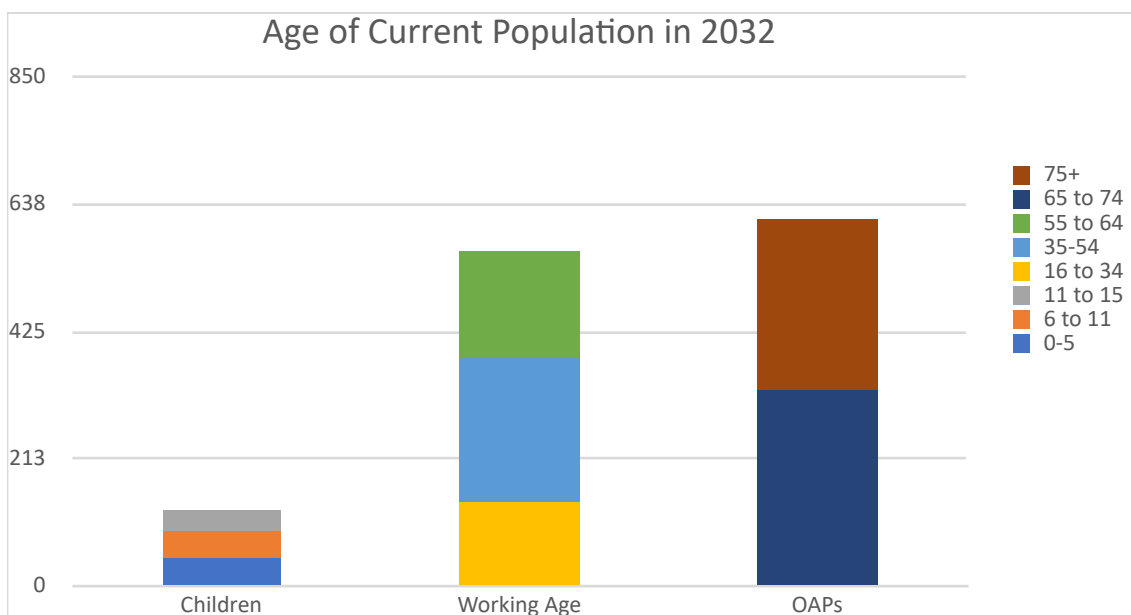
Despite the increase in total population, the numbers of school children and early middle-aged adults have fallen. These changes are clearer as percentages.



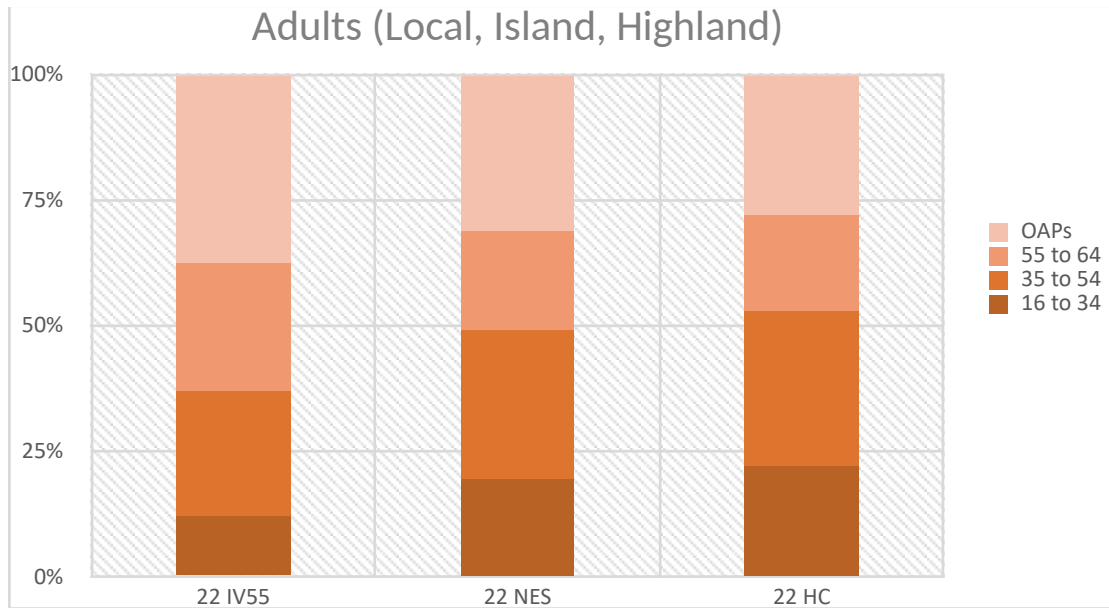
The next chart shows the current population by lifestage. The majority of working age adults will not be maintained without reversing recent trends.



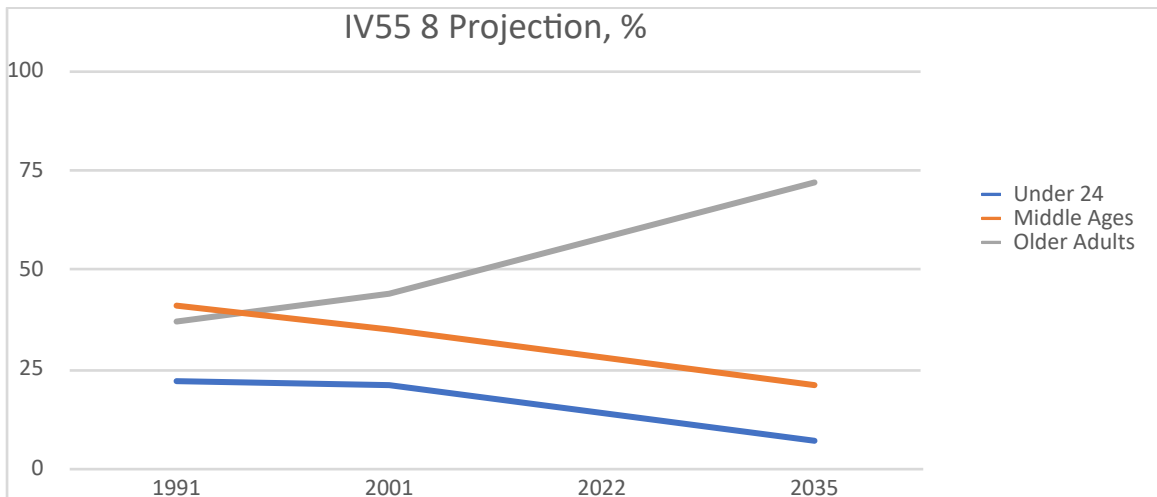
If we continue as we are, by 2035 a majority of adults in IV55 8 will be over 68 (n. 600). Meanwhile the working age population will be just 550. (This assumes a stable number of children, which of course may not happen.)



These trends are obviously not usual across Scotland. However, the best comparison to our type of area is the Western Isles (NES). Comparing adult populations, we see that our trend is not simply a result of remote island location.



In the Western Isles, 20% of adults are under 35, 50% under 55, compared to 12% and 38% here. That famously-aging population is nevertheless only 31% OAPs, compared to almost 40% here. Comparing ourselves to the rest of Highland shows even larger differences. If things continue as they are:



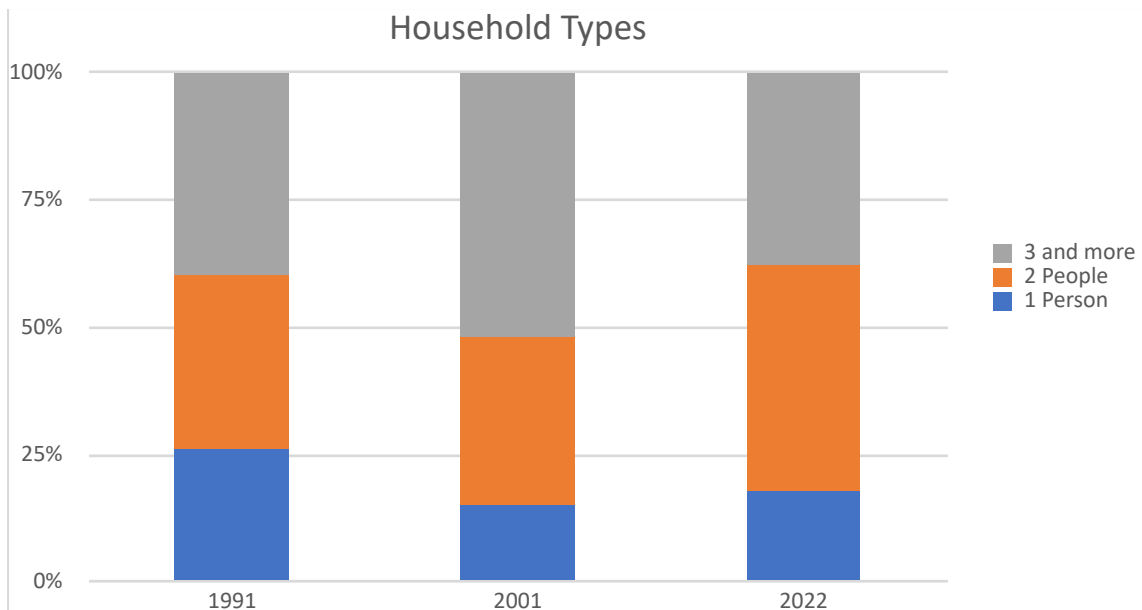
The roots of this problem are well-known: younger adults, particularly those with children, are less able to afford higher house prices. With the lack of longterm rentals (due to exceptional profits from holiday letting) it has become impossible for such people to move here, or for local young adults to remain/return.

Providing a meaningful level of affordable housing is the clear solution. However, it has been the clear solution since 1991 (when 9 homes were built for a waiting list of 36). The 16 currently in progress will make about as much difference. To return our balance of ages to the Highland norm (of c.50% older adults, 55+) would mean attracting – and housing! – around 150 more new young households.

The alternative to housing being affordable, of course, is to make the area attractive to young families who *can* afford to move here at current prices. Yet, in practice, improving infrastructure and services to that level would likely be even more expensive. This begs the question: what if nothing continues to be done? Will ‘the market’ sort it out? The three-decade trend above suggests not. Our area’s global attraction ensures a supply of affluent later-middle aged couples to replace those who re-move at advanced ages to be closer to care services.

Nevertheless, we are generally in good health. 80% of people described themselves as in good health in 2022, with only 5% rating their health as poor. In 2001, these figures were 69% and 9%. However, the distinction between ‘good’ and ‘fair’ health is notably subjective, and may have been affected by the pandemic. Therefore, we should concentrate on the 4% fall in poor health rather than the 11% rise.

In 2022, 36% of local households were single-person a slight rise from 2001 (33%). In 2022, 43% of households were two-person, up from 37% in 2001. The most major change is a marked fall in households with three or more people: from 30% in 2001 to 21% in 2022. This is broadly the households with children (young or young adult).

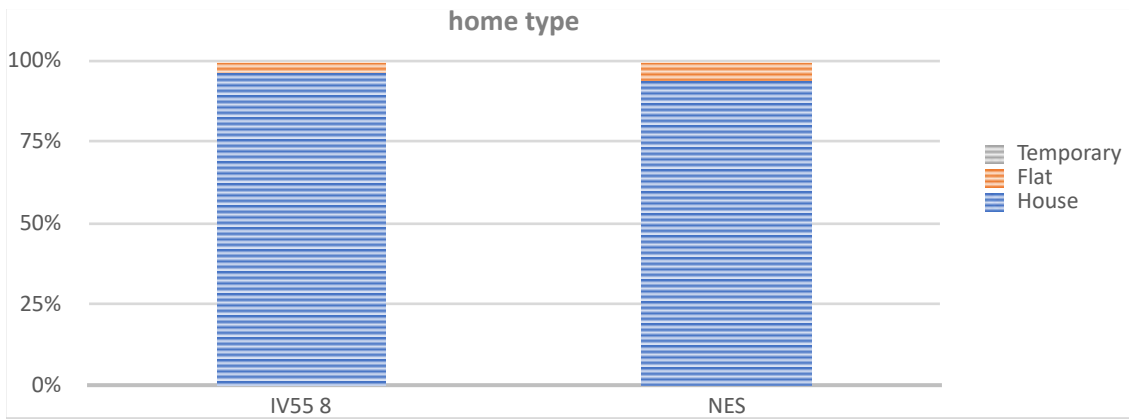


In 2001, 52% of people locally lived in such a household, but by 2022 this had fallen to 38%. Two-person households are now the norm: a fall of a third in larger households is a major demographic shift, paralleled by the age distribution figures. This implies significant under-occupancy, even of the residential housing stock, since most houses in the area are 2-3 bedroom. In 2022 97% of people lived in a house (with only their household) while 2% lived in flats. In 2001, these proportions were 95% and 4%.

Across DCC 50% of people live within the Village, in c.143 households: an average of 2.2 people per household (PPH). The other 50% of residents live in the townships: 49% of DCC's resident households. This gives an overall figure of 2.3 people per township household. Despite this overall similarity, there is considerable variation. Households in the Village ranges from 1 to 3.1 PPH. In townships, the range is from 1.9 in Feorlig to 3.3 PPH in Uiginish and Orbost.

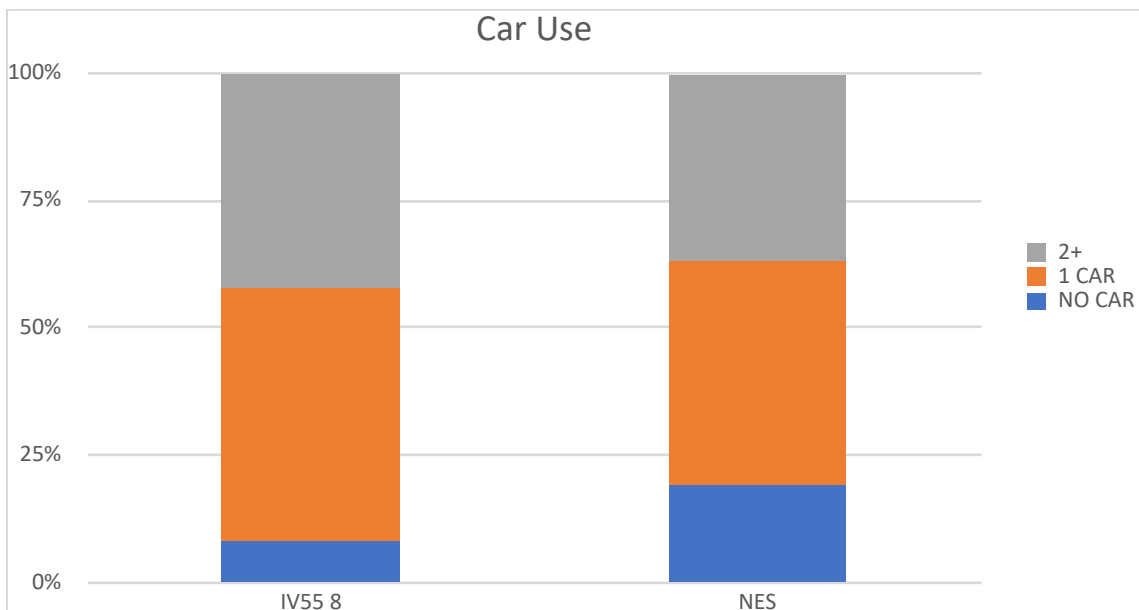
We can also compare 2022 figures for IV55 8 to Western Isles (NES). Houses rather than flats or caravans are more dominant in IV55 8 (chart shows only 80+%)





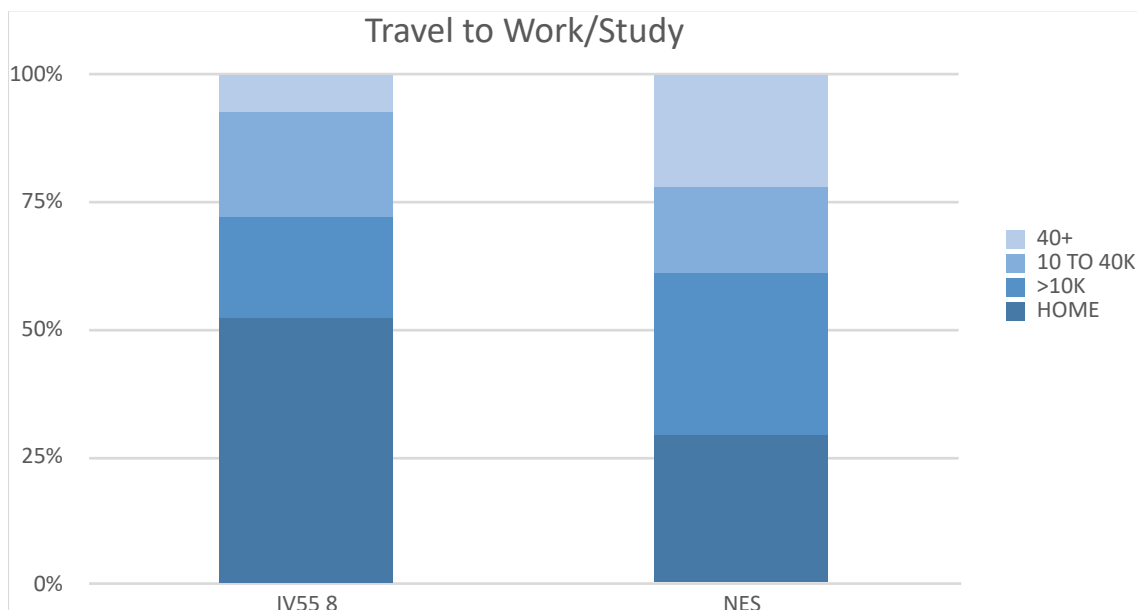
### Traffic & Transport Data

In 2001, 17% of IV55 8 households had no car (down from 21% in 1991) while 30% had two or more. By 2022, households with 2 or more cars rose to 42% while no-car households halved to 8%. Local knowledge – and average house prices – suggest that this shift is economic rather than needs-based: it was not easy to live carless in 2001, yet more people had to. More than double this proportion still live carless in the Western Isles. The change here since 2001 has not happened there.



Meanwhile, the percentage of people with no work/study commitments has risen to 49% from 40% in these two decades. The largest change has been towards homeworking. Travelling 10-40km remains the normal distance for those who travel

(19% in 2022, up from 17% in 2001). Travelling more than 40 km/20 miles has remained about the same (3% from 4%). Again, we can compare geographically too.

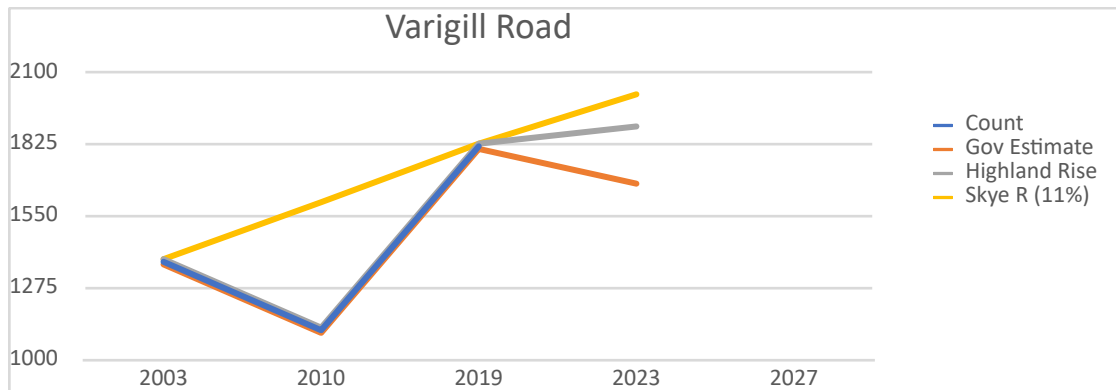


Compared to our area, people in the Western Isles generally work closer to home, but are less likely to work at home. However, local traffic has very little impact locally compared to visitor traffic. Traffic is one of the issues ‘everybody knows’ is a problem locally, yet it is unclear what can be done. To begin thinking about this, we have made a deep dive into the Department for Transport (DfT) figures for Highland.

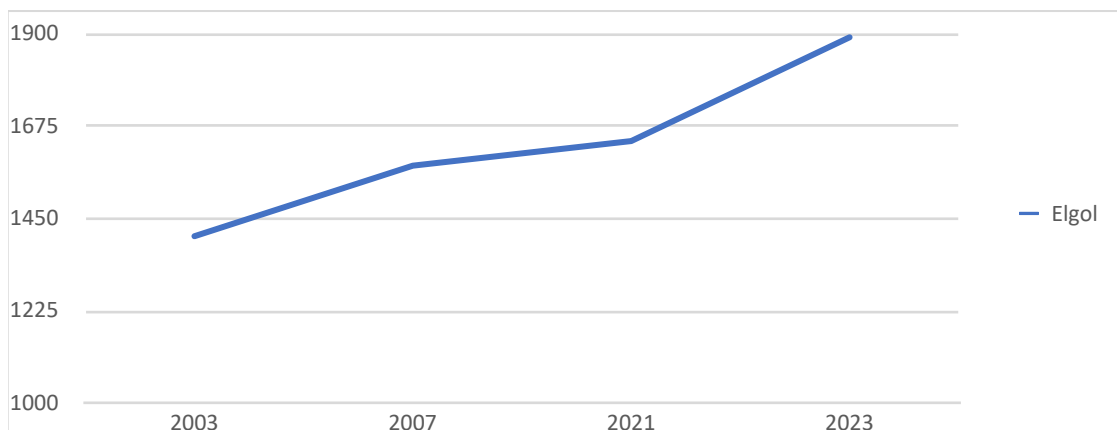
In the past 30 years, traffic (vehicle-miles) in Scotland has risen 37%. In Highland, however, it has risen 51%. The current upward trend began around 2012, since when traffic increased by 11.2% in Scotland, but by 21.4% in Highland. Highland also has a higher and more rapidly rising percentage of non-car vehicles, from a baseline of 20% in 1993 (vs. 18% Scotland) to 30% currently (vs. 21% Scotland, a much more substantial rise). Highland has 4% of Scotland’s population, but 6% of all vehicle-miles. Partly, this is because of its large area and high proportion of remote communities, partly the escalating number of visitors we attract.

It is not possible to fully localise these figures, but Skye has experienced even higher increases in the past decade. This trend looks set to continue to 2035 despite its

environmental impact. The main challenges of assessing Skye traffic are twofold and interlinked. One, even with roads that are regularly counted (Varigill shows direct counts) automatic estimates for 2023 are lowered by the pandemic.

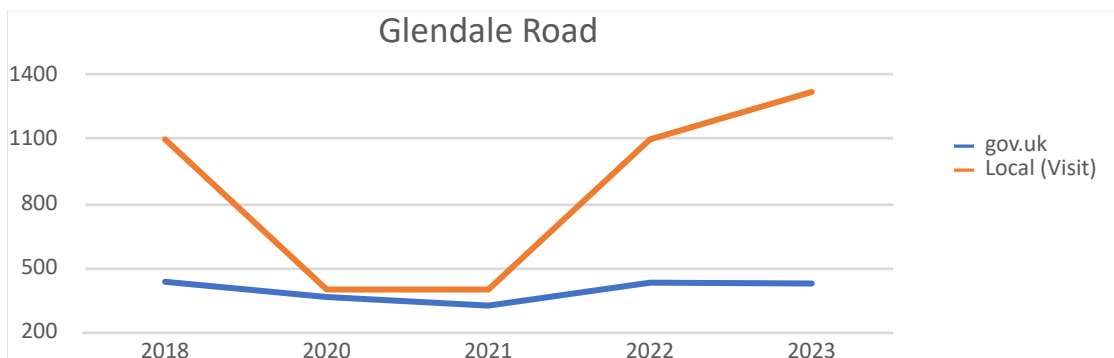


For comparison, the chart above also shows figures estimated on the proven Highland-wide rise of 4% on 2019, and the equally-proven Skye rise of 11% on 2022. We can also compare a frequently counted single-track road, Broadford to Elgol (where only the 2023 figure is an estimate, there were no counts during lockdowns). This is an area of similar remoteness and natural appeal to northwest Skye, showing proven figures of 1650+ vehicles per day for a dead-end single-track road on Skye.



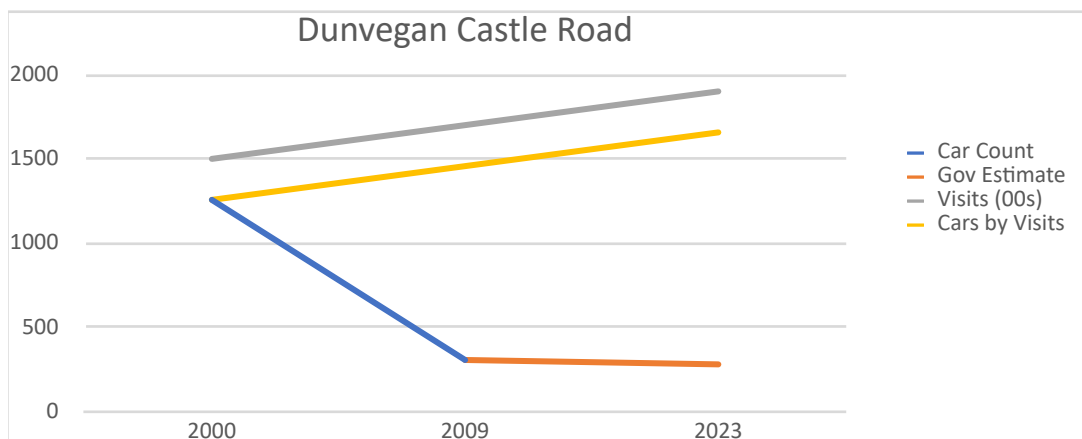
However, the second issue – seasonal variation! - is illustrated by Glendale. The DfT figures are actual counts (here, in/out averaged). But absence of pandemic crash shows they are off-season/residents-only. The other line shows a local high-season count, projected recovering to pre-pandemic level in 2022 and rising by the Skye

average for 2023. This suggests summer road-use is likely at least 3x the official estimate for 2023.



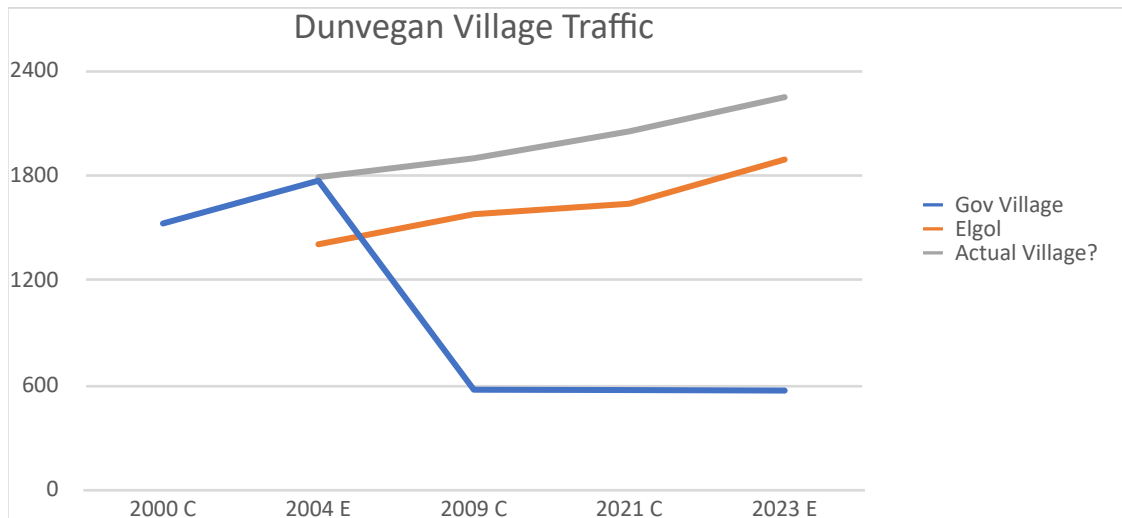
Given the global appeal of Neist Point, and the exceptional numbers of STLs in Glendale, it is likely actual figures equalled Elgol’s 1800 daily average

Across Skye, we see estimates based on summer counts in 2000 revised by off-season counts 2009-12 with recent estimates based only on those. So, for Dunvegan Castle, the figures suggest a fall of three-quarters from traffic levels in 2000. This is obviously wrong! There are more visitors to the Castle (2025 job adverts say 180,000) and more of them now travel by car (than coach, see Scotland-wide statistics).



The official count of 2009 simply cannot reflect known tourist traffic to the open Castle that year, whereas the 2000 count must do so. Therefore, the yellow line is the likely *minimum* volume of traffic now using this road during the Castle’s opening months: 5x the current estimate.

Similarly, for traffic through the Village (Lonmore to A850) the official figures are shown by the blue line. Did overall traffic fall by two-thirds between 2000 and 2009? No.



Again, the official figures show the difference between summer and winter, not the real change over years. Actual counts at Elgol (orange) happen to be close to the 2004 estimate for Dunvegan, and show a consistent rise through 2021, likely to have been at least matched in the Village.

In short, there are significant problems with how traffic across Skye is surveyed and estimated. The evidence shows these are particularly vivid in the DCC and IV55 8 areas, where estimates (on which road maintenance is based) are wildly out-of-line with other evidence of traffic volume (and with comparable communities/landscapes in other parts of Skye). This issue is also escalating rapidly, since summer Skye Bridge traffic increased by 101,565 vehicles (11.4%, Skye Connect) between 2022 and 2023.

There is therefore an urgent need for further local car-counts, both off- and in-season, to capture the actual numbers using our roads. There is also a need to lobby for regular automated traffic surveys at sites known to attract exceptional visitor numbers, at consistent times of year (e.g. April, July, November) so that figures are analysed like-for-like in future. This in itself would trigger much-needed

improvements to our roads. It is further worth noting that every other such site on Skye (Elgol, Storr, Kilt Rock, Fairy Pools, Dunvegan Castle) now has a dedicated bus service several times daily, while Neist Point (and Coral Bay) are car-only.

(Elgol, for example, is a community of just 62 households, but served by four return weekday bus services, summer and winter. A modern Stagecoach 20 passenger minibus nimbly handles the single-track road. Providing an essential, regularly-used lifeline (and social experience) for the elderly and disabled in the community, it is also popular with hikers and independent travellers of all ages, while serving to link Broadford and Kyle. It is not impossible to run an economic and effective bus route, particularly in areas appealing to hikers, cyclists, and exceptionally high numbers of visitors.)

Reliance on cars alone is not only ecologically unsustainable. It also makes both community members and visitors particularly vulnerable to rising fuel prices, and repetitions of fuel crises, as well as to the planned transition to electric vehicles by 2035. It is expensive to the local authority in terms of road repair, traffic safety and school/NHS taxis. There is a clear case for a local circular public transport route (as was recently created for Trotternish) e.g. several daily Bakery-Glendale-Orbost-Roag-Lonmore-Village-Castle-Claigan, returning Castle-Village-Lonmore-Vatten-Harlosh-Feorlig-Struan, as well as for locally-owned shuttle buses.

### **Business & Short-Term Let Data**

Across the DCC area, 59% of all addresses had resident households in 2011 (likely remains accurate, more recent data unavailable). This varies between village and townships (60% of village addresses with resident households, 57% of township) and between townships. Claigan has the lowest proportion of resident addresses at 33% whereas Vatten has the highest at 81%, followed by Harlosh with 69%.

This pattern is actually opposite to the distribution of commercial premises and registered companies in the area. There are no shops and few workshops outside the village, where 60% of registered companies are located (n.15). Half of the townships have no registered companies (Claigan, Vatten, Feorlig). Roag has the most, followed by Uiginish/Orbost, and Harlosh.

While company registration is not a good measure of actual business activity in our area – most self-employment is as sole traders, and company figures do not map to business ratepayers – this data does confirm that the 41% of non-residential addresses in DCC are mainly accommodation: second homes and/or short-term lets.

However, NW Skye has 80% of Art Skye’s Creative Trail businesses in north Skye (43% of all in Skye & Lochalsh). Similarly, the area has 25% of all businesses advertising on the Skye & Lochalsh sheet of the 2025 visitor map, and the same proportion of the top 25 ‘Things to Do’.<sup>1</sup> These compare to a resident population c.10% of Skye.

The 200k figures commonly quoted for local attractions, and the island’s assumed total of 650k/pa, are low compared to surveyed transport to Skye: 496,753 cars westbound by bridge April-September 2023, plus 212,847 unique passengers by ferry in 2022.<sup>2</sup> Given Visit Scotland’s figure of 2.6 for the average travel party, this suggests around 1 million visitors to Skye in 2025, with around a third travelling through DCC.

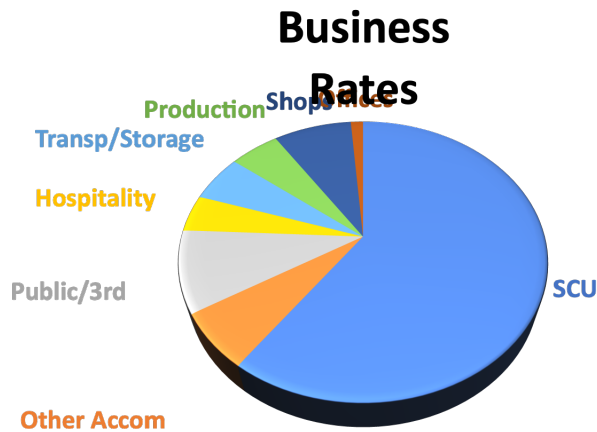
Business Rates: Highland Council’s Assessment Rolls for 2024-25 show 241 rateable properties in IV55 8. 141 of these (58%) are self-catering units (SCU)<sup>3</sup>. In addition, there are 4 small hotels, 3 guesthouses, 3 caravans and 2 campsites, 2 chalets and a bunkhouse. Overall, 95% of ratepaying accommodations are self-catering.

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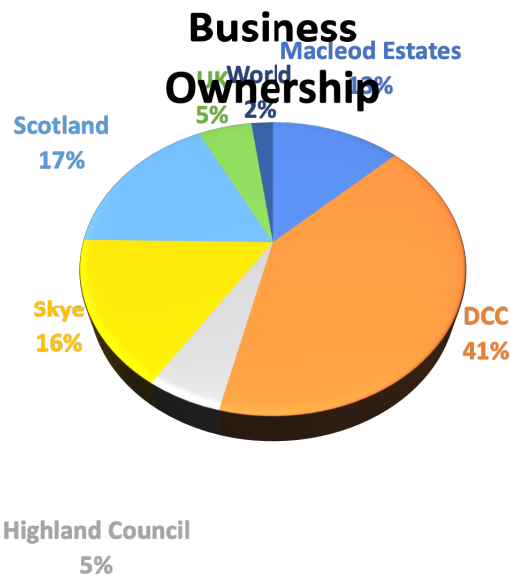
<sup>1</sup> [Things to do on the Isle of Skye | 50 Activity Ideas](#)

<sup>2</sup> [Tourism | Isle of Skye](#) 4/11/24, Visit Scotland, Scotland Visitor Survey 2023, Highland Factsheet. [Skye: Up to one million people destined for island amid calls for 'radical thinking' on tourism](#)

<sup>3</sup> Combined rateable value of £335,855 (av £2373, 35% of a £956,500 total).



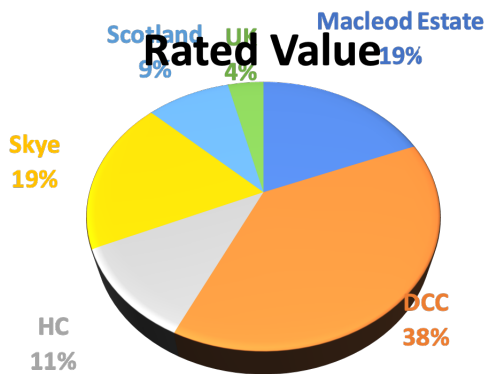
Of the remaining 83 active entries for IV55 8, 22 are public or third sector (churches, halls etc.): 26% of non-accommodation businesses (NAB). There is one public house, 2 cafes, 4 licensed restaurants, a bakery and 2 museums, for a total of 10 hospitality (12% of NAB). 4 businesses are garage-related, 9 are storage (including boathouses). Production includes 6 industrial workshops, 6 studio/galleries. 19 shops are listed, 23% of NAB. There are 3 office premises. The remaining entries cover Dunvegan Castle.



By valuation, 17% of rateable value is located in WCC, 35% in GCC, and 48% (£460,300 of £956,500) in DCC. (The Ben Aketil windfarm is allocated to the Edinbane area, but its rateable value - £722,000 – almost equals the IV55 8 total.) It is important that relative to profit ratio, the rateable values of SCUs are notably low.



It is only practical to analyse ownership location for the DCC area. 12/96 entities are owned by Macleod Estate (rateable value of Castle £25k, vs Hotel, £30k). The majority of businesses are locally owned, 57% (70%, including Macleod Estate).

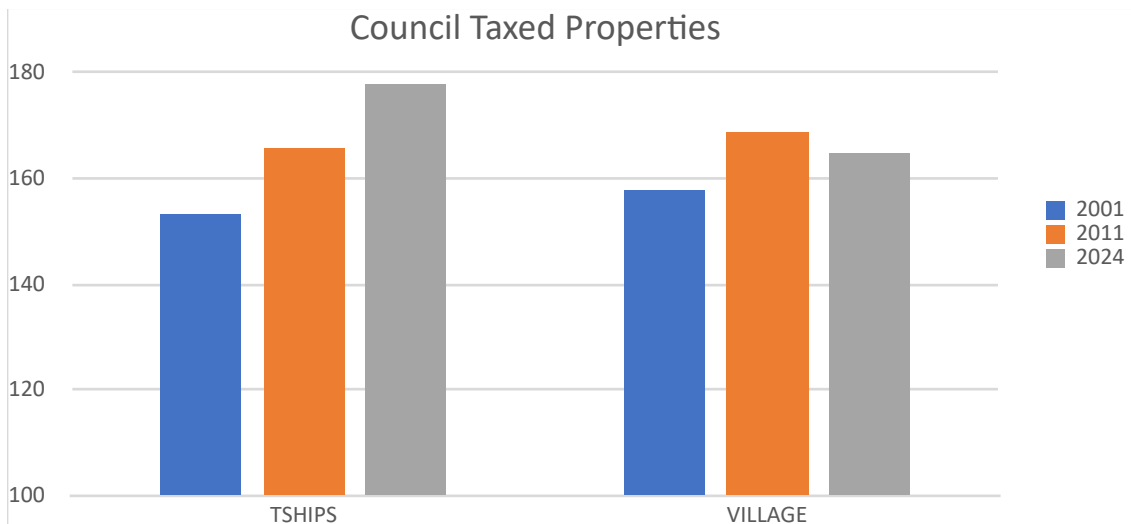


Accommodating Visitors: The 21<sup>st</sup> century has seen escalating differences from the traditional model of accommodation discussed in e.g. The Dunvegan Study (1991). Thirty years ago, many resident families opened their homes to visitors as B&B, while hotels offered the main alternative. Self-catering was uncommon, mainly offered in second homes when unused (5% of 19% from census data).

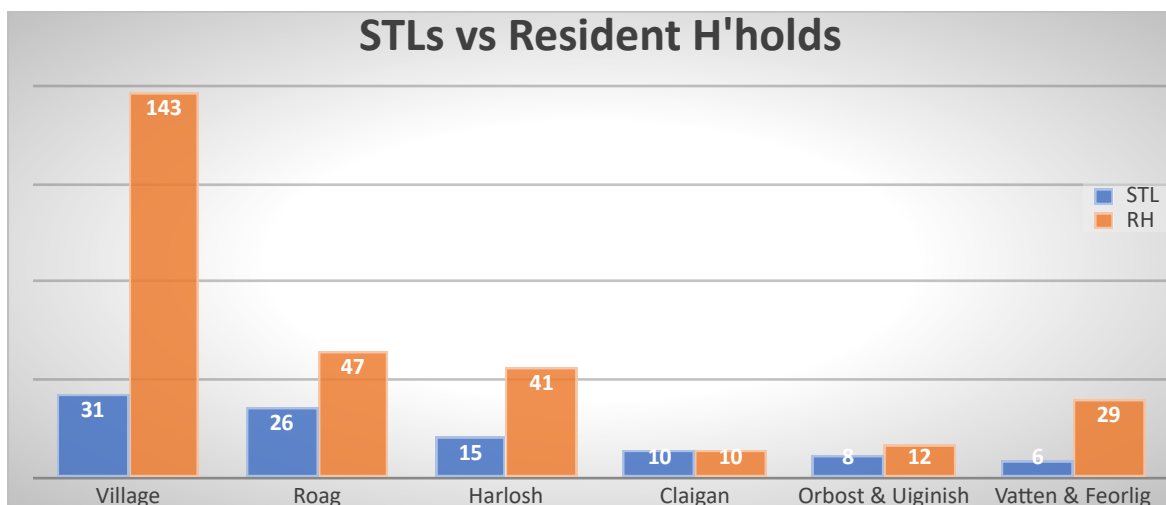
Today, only nine accommodations in the Village share their homes with guests. Two of these are officially guesthouses, while a further 4 functionally are (7+ guests). Nine in the townships (mainly Roag, 6) share their homes with guests, with only 1 guesthouse. The 'house letting' designation in the Register meanwhile, preserves traces of such traditional self-catering (presumably remaining more common elsewhere): two across all townships, three in the Village, 5%.

This change to a norm of secondary lets on self-catering units is much more significant than any overall rise in visitor numbers: large numbers of visitors can be accommodated at every level of budget/luxury without ever taking housing from a resident. It is the move away from residents (or second home owners) and visitors sharing space which is unsustainable.

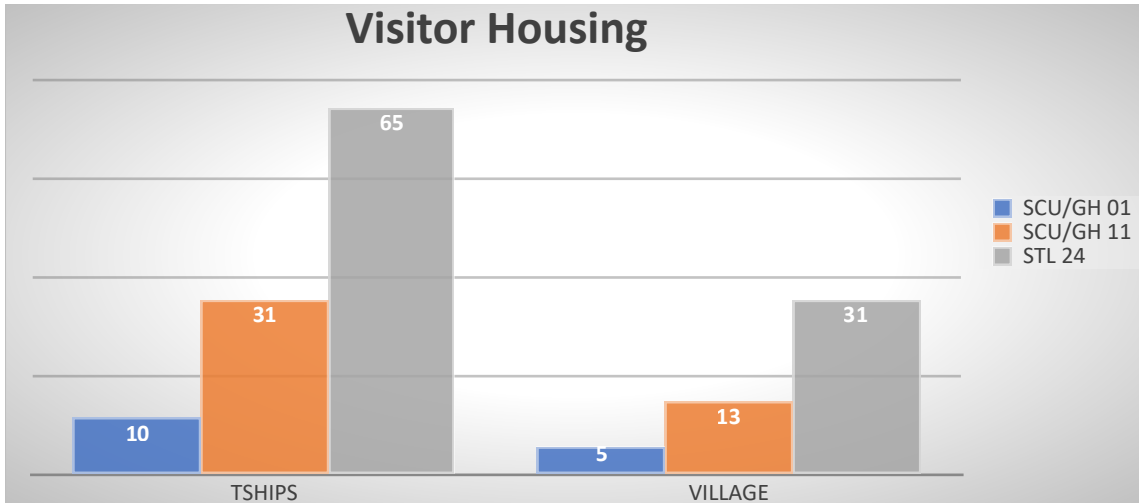
We have also looked at Council Tax (CT) data, over time:



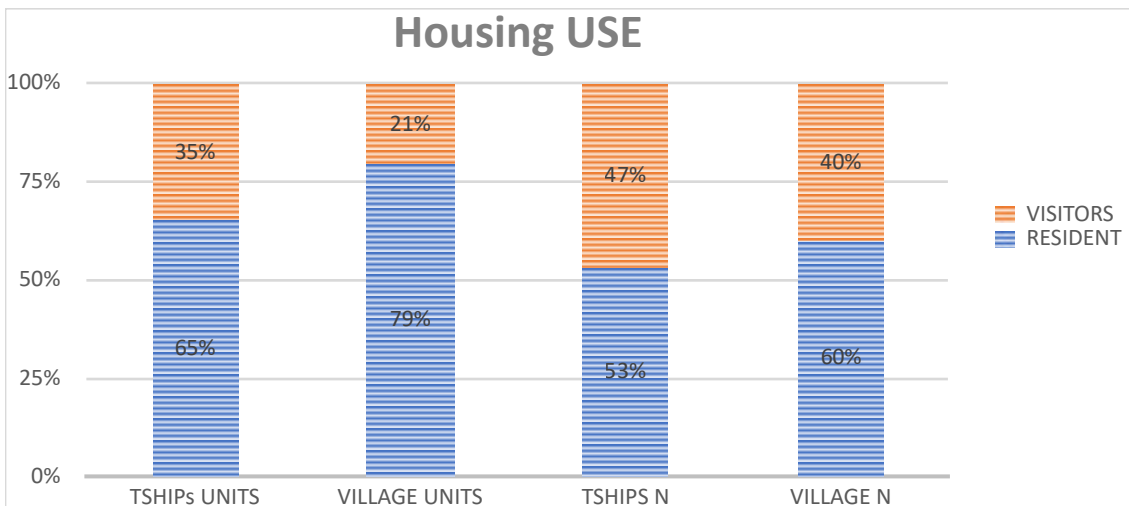
The 'occupied' properties in the Village have fallen slightly, while in the townships, new houses continue to rise. Indeed, the pattern of 2001 - 49% of properties in townships, 51% in Village - has more than reversed, to 52% in townships. However, the broad CT figures do not capture anything of the actual expansion of holiday letting.



There are 8314 licenses on the Highland Public Register of Short-Term Lets (STLs). 1563 are in Skye & Lochalsh (19%) although the area has just 4% of the Highland population. 258 are in IV55 8, 16% vs the area's 11% of Skye population. This is a manageable number to analyse in more detail. Glendale has the most, 110 or 41%. Waternish the fewest at 65, 24%. Dunvegan has 95.



Part of the doubling rise above is real, part is explained by some categories of SCU not having to register for business rates, but being covered by the STL license.



In other words, 35% of properties in DCC’s townships accommodate visitors, and in high season, around one of every two people is a visitor. While the village is more residential (‘only’ 20% of housing is for visitors) still in high season, 3 in 5 people are staying visitors. Assuming 80% occupancy June-August, 60% April/May, September/October (at the high end to cover the almost-all-year nature of self-catering now) this suggests a total of 69,000 overnight stays in DCC in 2024. That is 110 per resident.

Overall, two-thirds of STL licensees and units are spread across the seven townships, the remainder in the Village. However, the number of guests accommodated is much

nearer equal, 56% in townships, 44% in Village, where there are more guesthouse-type properties and fewer pods (32% vs 46%) as one expects.

Pods are demographically desirable, because they do not take accommodation out of residential use (although there is also a dearth of housing for seasonal workers, an increasingly common use for pods). We expect fewer pods in a village, for reasons of space. But in townships where the balance of pods to STL houses is low (Claigan 20/80%, Uiginish 33/67%, Vatten 25/75%) there is cause for concern. Vatten is a holdout of permanent residence so far, but whether it remains so is a matter of how, not if, accommodation is developed.

It is often said that 'people want' detached self-catering accommodation, therefore its dominance in DCC (and Waternish, Glendale). However, it is not at all apparent that this is the case, as opposed to resulting from e.g. failure to develop an hotel appropriate to even the 1991 numbers visiting Dunvegan Castle (then c.115,000 p/a). These same visitors, after all, manage other types of stay on their journeys to DCC, and indeed, no longer usually stay long enough in the area to make self-catering a particular necessity. Hotels and hostels, B&Bs and Guesthouses flourish elsewhere on Skye. They are also popular in Dunvegan Village compared to the townships.

The point, for Action Planning and a Local Place Plan, is that markets can be led as well as followed, particularly when visitor demand so visibly exceeds supply in high season. The current dominance of self-catering (and relative lack of budget options for the usual party size of 2-3) affects not only housing, but also the volume of campervans, the amount visitors have left to spend in the area (if indeed they buy anything here) and so on. Further, while hotels/hostels have downsides, they do offer employment and amenity to their community. As with pods, this is not about changing the present. It is about planning for a sustainable future, so that visits are to

a thriving community embracing sustainably-serviced accommodations with all necessary employees.

As well as serving our own population, and the visitors annually attracted by Dunvegan Castle and Coral Bay, DCC also plays a central role for the residents and visitors of Glendale and Waternish. We are therefore looking at 1,500 permanent residents, with probably 300,000 total day-trippers travelling through DCC plus c. 70,000 overnight stayers in DCC alone annually. Although rarely highlighted, since out-of-tune with the external appeal of Skye, this is mass tourism on an enormous scale. Even a notoriously 'touristy' island like Lanzarote has an annual visitor/resident ratio about 50/1. We see ten times that (593/1) in total, more than double it (110/1) for overnight stays. The purely logistical challenges alone are immense.

It needs to be recognised that DCC is asked to offer both essential and amenity services at such scale. By doing so we are providing services not only to those visitors, but also to every community (in the rest of Skye, in Inverness and the wider Highlands, in central Scotland, and often in the UK as many of our visitors are global) that serves them on their way. But we are doing so on a budget defined by just 600 Council Taxpayers. As long as that is the case, there will be congested roads, overcrowded parking, overflowing bins, overworked staff and overstressed residents.

This, then, is the official outline we are aiming to fill-in with local data from our surveys. The gaps, errors and assumptions in the data currently used by official decision-makers have significant impacts on our lives and futures. They can only be corrected by ensuring our local knowledge is clearly presented and easily accessed in a Community Action Plan.