APPENDIX II

Context + Market Appraisal

- II/I: Island facilities
- II/II: Community projects
- II/III: Gap analysis
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Appendices

Appendix II/I : Island facilities

The following table provides a summary of the facilities located on Lismore (on island only). They are in alphabetical order under the categories attractions / visitor destinations, community facilities, accommodation, businesses, services, events and future projects.

Facility	Notes / description
Attractions / visitor destinations	
Achinduin Castle	Impressive MacDougall castle from around 1300 overlooking Bernera
Barr Mor	Highest point on Lismore at 127m with Bronze Age kerb cairn and cist at the summit – 360 degree views, ridge walk
Castle Coeffin	Spectacular 13th century MacDougall castle
Heritage Centre	Impressive Heritage Centre covering the island's history with accredited museum, cottars' cottage, archive, toilets, café and shop – open March through October 11 – 4 daily; hosting a variety of events throughout the year
Port Ramsay	Pretty coastal cottages and sheltered anchorage
Salen	19th century lime kilns and impressive limestone cliffs
Seaweed foraging	Five forages were planned for 2023, includes cooking seaweed goodies and hot tea on the shore
Secret Garden	Baile Geamhraidh, in Scotland's Garden Scheme, open all year by appointment; organic produce and refreshments available
South End	Southern point of the island with 1833 Stevenson lighthouse
St Moluag's Cathedral	Ancient heart of the island on the site of St Moluag's 6th century cell (13th century remains)
Tir Fuir Broch	2,000 year old broch, panoramic views
Walking trails	19 promoted trails on Walk Lismore ranging from short easy walks to longer more challenging ones – includes the circular 6-mile St Moluag's Trail
Community facilities	
Community / Public Hall	Providing main hall (with stage), meeting room and small kitchenette (no food prep area) – used for badminton, hall hires, parties and music plus visiting Doctor's Surgery; electric vehicle charging point
Island groups	Public Hall, Community Trust, Community Transport, Parish Church, Heritage Centre, Community Council
The David White Library	Research library of around 400 English and 200 Gaelic books relevant to Argyll and the Highlands and Islands
Lismore stores	Shop and post office, general stores and Off Licence; business currently being bought by the Community Trust
Accommodation	
Achuaran House	Self-catering sleeps 8

Ballimackillichan Croft	Self-catering
Balure Farmhouse	Self-catering sleeps 6
Larkrise	Self-catering sleeps 4
Point Steadings	Self-catering
Port Moluag House	Self-catering sleeps 2
Sailean Bothy	Self-catering sleeps 4
Stay with Sarah	Private room in guest house – sleeps 2 (Airbnb)
Stokers' Cottage	Self-catering sleeps 4
Strathlorn	Self-catering sleeps 6
The Lismore bunkhouse and campsite	Accommodation sleeps 12 plus space for two campervans and tents
The Smiddy	Self-catering sleeps 2-5
Tobar nan Iasgair	Self-catering sleeps 8
Businesses	
Baile Geamhraid	Providing beef, eggs, plants and seaweed foraging tours
CamelArt	Catherine Davies, produces cards, tea towels, mugs etc sold in the old phone kiosk and online
CELM shop	Located in the Heritage Centre selling souvenirs including local crafts / produce
Davy Garret	Piping lessons
Explore Lismore Island tours	Land Rover explorer tours including shepherding and paddle boarding
Foodstuffs	Include: Slainte sauces; Lismore oysters / PR Oysters; Lismore Mussels and Lismore prawns; Dutch bakery
Greig Gilchrist	Art gallery / shop
Island shop and PO	Community run selling essential local conveniences
Isle of Lismore Café	Fully licensed café in the Heritage Centre
Lismore bike hire	Located at both island ferry ports – staffed in the summer and by arrangement in the winter, includes e-bikes
Lismore Luminations	Handmade luxury candle business
Mairi Campbell	Musician, runs fiddle workshops in her studio at Carnie Cottage
Mogwaii Design	Home and fashion accessories
Sadie Gilchrist	Wedding flowers / floral arrangements
Seahorse	Quirky design brand, making customised, personalised items, (online and from Castle Coeffin croft)
Shepherd's Cottage Soaps and Luxuries	Artisan soap and body care business
The Sailean Project	Grass fed Highland beef, lamb and chicken using rotational grazing
Services	
Church	St Moluag's Cathedral / Lismore Parish Church – currently in process of disposal by Church of Scotland; community acquisition / transformation being investigated
Community bus	2023 all-electric 7-seater minibus for use on the island and to the mainland

Emergency services	Volunteer ambulance and fire brigade
Ferry port – pedestrian / cycle	At Point to Port Appin (Argyll and Bute Council ferry) with waiting room, bin and welcome sign & information board
Ferry port – vehicles	Achnacroish to Oban (Calmac) with waiting room, toilets and bins and welcome sign
Island website / Facebook	Managed by a local group (not constituted in any way)
Phone boxes: information / shop	Ex-BT red phone boxes at Point and Achnacroish with free Map and Guide, selling souvenirs (honesty box) and a summer bakery
Primary school	Located at Achnacroish (includes children's outdoor play)
Events	
Flower festival	June – in Lismore Parish Church
Heritage Centre	Events programme throughout the year (mostly in winter)
Lismore agricultural show	Mid July – residents and visitors
Lismore sports and raft race; Dance	End July – residents and those with a connection to the island
New Year Dance	2nd January – post-Festivities dance in Public Hall
Taproot	Series of Sunday afternoon events, (1 per month over the Winter) started as 'end of season' cultural events - literary at first, then music became a major factor. Initially in the Hall, Church and Heritage Centre; now all at the Heritage Centre
Future projects	**(excluding current projects covered below)**
Glamping pods	Planning approved for six at Achinduin
Point Farm wellbeing retreat	Private wellness retreat enterprise by Ron Livingstone for a substantial 'hall' and support spaces on the west cliff-side of Point ferry car park. Planning permission has been granted and the short stretch of access road will be constructed in the first half of 2024. The project will include some electric vehicle charging points that can be used by the community (low cost) and visitors (higher cost)

Appendix II/II : community projects

Lismore is home to a dynamic and active resident community, as shown by the number of community and private projects currently underway on the island. In addition to the Church project, the five initiatives below are all live:

- ***Lismore Stores;*** a Community Trust project for the community to operate the island's general grocery shop and Post Office shop. The sale has now completed with a community business buy-out via community shares and donations and the store to be operated by a Community Benefit Society. The long-term aim presented in the Prospectus is to relocate the shop to improved premises, perhaps in Achnacroish. The current project includes no fixed asset / building apart from the equipment.

- ***Affordable housing***; a Community Trust project to build two new semi-detached 2-3 bedroom family houses at Newfield terrace, Achnacroish. Planning Approval was granted on 14th November 2023, with further information at https://isleoflismore.com/island-groups/community-trust/affordable-housing

- ***Lismore Community Transport***; secured 100% grant funding (£56,000) to acquire an all-electric community bus with wheelchair access, which came into service in November 2023. The older diesel bus has been sold to the Community Trust to support the Stores project.

- ***The Public Hall***; has agreed to host the electric charging point for the Community Bus, and to allocate parking space for it in the adjacent car park. The charging point will, in time, be available for private use, at a cost to the user. There are also ambitions for a new community / island hall, although these have not yet progressed to a development stage.

With the addition of the Church project, there are considerable community projects in motion on the island (given its size and population) and there will need to be a conscious effort to ensure that the Church project complements these existing projects, is conscious of volunteer capacity and does not compete for funding.

Given that there are so many live community projects, there may be opportunities for some (or greater) project collaboration or integration between projects, regarding selected future uses or ambitions. For example, bringing together some appropriate functions of the hall within the Church project could free up the hall site for the new shop. Although not a recommendation, this is suggested for consideration as the project develops.

Appendix II/III : Gap analysis

Lismore is a remote and yet accessible island with a dynamic community – these are key factors that have a bearing on core gaps in provision. Although not all are relevant to the opportunities provided by the Church project, identified gaps, taking into account current projects, and based on the audit, site visits, discussion and comparators with other islands include:

- Indoor sports facilities – given the population size and demographic these should be suitable to cater for all ages (e.g. table tennis or bowling)

- Indoor facilities for children / youth – although these may in part be able to be provided by the Heritage Centre

- Larger scale combined destination / visitor retail – despite a number of local art / craft / foodstuff retail offered across the island, their wide geographic spread means that they primarily appeal to overnight visitors. Day visitors will be limited to the combined retail of the Heritage Centre. There is potential for an enhanced visitor retail outlet on the island's main spine road

- An aging population – the resident population is heavily skewed towards the over 55s and is it likely that the average age will continue to increase over future years. Improved facilities for older people (that do not compete with café / heritage centre) could be well used

- Hotel / pub – there are few Scottish islands (perhaps none) with a population similar to Lismore that do not have a hotel or pub. For example, Eriskay, Gigha and Colonsay all have significantly lower populations and have a public house / hotel or bar (on Colonsay this is now community run) as do Seil and Kerrera, the latter having a population of only 68 full-time residents, including 18 children. However, there are numerous hotels (some of very high quality) located on the mainland close to Lismore

- Distillery – given the experience on other islands, this may have the greatest potential for employment and economic growth

The community have also shared thoughts through surveys and consultation on how they would like to see the church and church house used, the most popular being:

Church

- Interpretation centre covering St Moluag, the island's ecclesiastical history in in association with the heritage centre
- Church use / life event hires such as weddings and funerals (including a destination wedding venue) and for worship
- Performance space / hires particularly for music
- Quiet space for contemplation, meditation, sanctuary, retreat

Church house:

- Long term let as an interim use before works commence or as funding is raised
- Art studio use and retail
- Overnight accommodation supporting church events or specific groups
- Event and function support for the church (e.g. catering and storage)
- Workshops in both church and church house, including archaeology

The table below provides a high-level appraisal of these uses setting out the key benefits and constraints before an assessment is provided that indicates the suitability of these uses for further analysis within the options appraisal.

Use	**Potential**	**Constraints**	**Assessment**
Church			
Indoor sports	May be a good local demand and low impact sports (e.g. table tennis) could be appropriate	Equipment likely to take up considerable space / storage and impact upon other uses. Debateable appropriateness within church and overlap with community hall	Poor fit
Existing hall uses – main hall	Large more atmospheric space with better acoustics and good income potential	Potential for damage (larger parties / dances with alcohol), lack of supporting facilities and some uses not appropriate for heritage significance. Also unable to accommodate all main hall uses (e.g. badminton)	Poor fit
Church use / life events	Previous uses already demonstrate a good fit	Lack of supporting facilities would limit some uses, destination wedding venue may be limited by reception space, island accessibility and accommodation	Good fit
Venue hire / performance space	Excellent acoustics and potential for more flexible seating / space availability	Lack of supporting facilities would hinder venue hire and attendance for some uses	Good fit
Quiet space	Excellent fit with character of building	Potential for overlap with the new wellbeing retreat at Point unless addressed	Good fit
Heritage interpretation	Internationally significant story and building	Potential for overlap with the Heritage Centre unless addressed	Good fit
Church house			
Distillery	Good for island economic benefit and jobs	Limited site space available and lack of local resident enthusiasm	Poor fit
Enhanced visitor retail	Means of bringing island makers together and easy	Requires a permanent gallery / retail space, impact upon other uses	Good fit

	point of sale for visitors		
Hotel / pub	Good for island tourist growth	Impact upon tranquillity of island and excessive visitor growth	Poor fit
Resident (long let) accommodation	Current lack of (affordable) housing on the island	Only to be used as a short-term use while the project develops – removes the building from any other uses	Good fit
Artistic / cultural Residencies	For art, music, literature, heritage – ideal to link with use of church space for activities / shows	May remove too much space from the church house to provide supporting facilities for church events	Good fit
Event and function support	Would increase the appeal and use of the church for events and activities	Conflict over space availability with other more direct forms of income generation unless addressed through mixed use	Good fit
Overnight accommodation (church users)	May increase the appeal / ease of use for certain event performers / church hirers	An agreement with other local accommodation providers would free up the church house for other uses	Good fit
Both / either			
Aging population facilities	Limited facilities at present – need only be temporary / flexible in space requirements	Potential to conflict with the Heritage Centre (as these could be provided there) unless addressed	Good fit
Training / workshop venue	Provides an atmospheric venue for a wide variety of topics – workshop leaders will be required	Likely to require use of both buildings and use likely to be sporadic requiring full days and sometimes full weeks or weekends but will be planned well in advance	Good fit
Existing hall uses – smaller rooms	Uses such as meeting space and GP surgery could be provided	Potential to conflict with the Heritage Centre and community hall unless addressed. Also likely to require permanent space use (e.g. GP surgery) limiting other simultaneous uses	Poor fit
Children / youth facility	Limited facilities at present – need only be temporary / flexible in space requirements	Potential to conflict with the Heritage Centre (as these could be provided there) unless addressed	Good fit

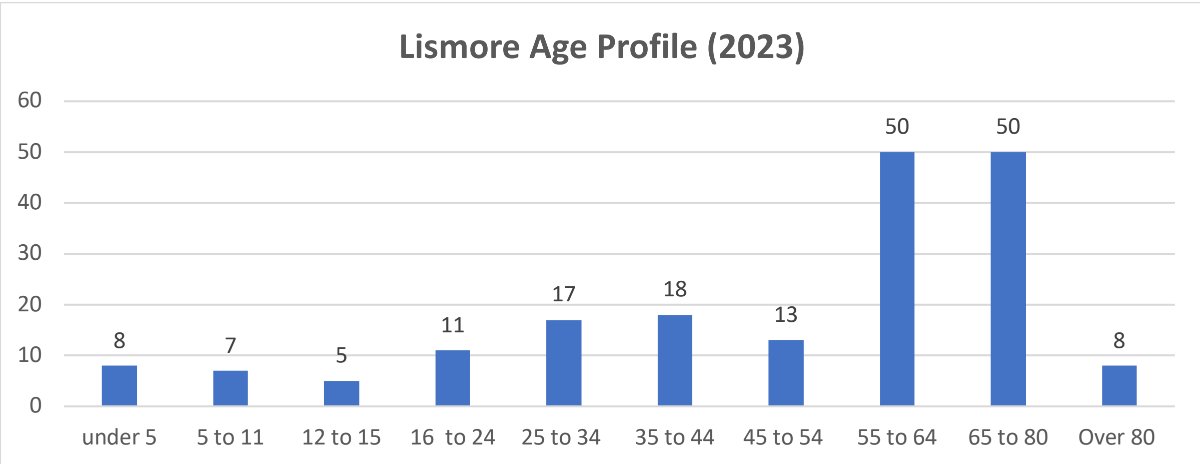
Appendix II/IV : Market appraisal

Local demographics

The population of Lismore at the 2011 Census was recorded as 192. It has since decreased to 187 (2023). Lismore has a significantly higher proportion of residents aged 65 or over (compared to Coll 14%, Gigha 19% and Colonsay 25% - 2011 Census) and significant lower percentage of the population (11%) aged 0-15 (Coll 23% , Gigha 23%).

It is interesting to note that Lismore also has a very low proportion of residents aged 45-54, reflecting the lack of families with teenage children. As the graph below shows, a considerable proportion of residents (almost 60%) are aged 55 or over.

This data, and national trends, suggest the population on Lismore may decline further placing pressure on the viability of key services, e.g. school, doctor, ferries, shop and businesses.



It has been noted that a key factor in the population demographic is the availability of homes, particularly affordable homes, an issue which is now being addressed by the Community Trust at Achnacroish.

Although the population of Lismore is small, the island can draw on a much larger local mainland population. There is significant collaboration and interaction with the c.1,000 full time residents in the immediate mainland locality of the Appin and Duror / Kentallen area and close links with the 8,000+ residents of Oban.

Tourism market

The National Picture *(VisitScotland 2019)*

The tourism data uses figures for 2019 for consistency across sources and as arguably our last normal year, although tourism is now beginning to return to some state of normality. The national tourism data shows that tourism was growing in Scotland, fuelled by a growth in domestic trips by Scottish residents. In 2019, there were just over 17.5 million overnight tourism trips undertaken in Scotland, comprising 14.1

million domestic and 3.5 million overnight visits (visits, bednights and spend all increased by a sixth on 2018 figures). In total, these tourist visitors stayed 74.7 million nights and spent £5,865 million.

Tourism day visits however decreased, compared to 2018 with only 134 million, reaching their lowest level since 2011, although day trip expenditure remained fairly stable at £5.8 billion.

For accommodation providers, 2019 saw peak occupancy rates for touring sites (41%) and hostels (60%) but a decrease for self-catering accommodation (48%).

The USA was Scotland's largest international market, followed by Germany and then China for nights and Australia for spend. For domestic visits, while most visits are made by Scots, visitors from England stay the most nights and spend the most money.

In terms of motivations and interests, the Scotland Visitor Survey 2015 and 2016 (Jump Research for VisitScotland) showed that scenery and landscape was the primary motivator (50% of people) although history and culture was second (33%) and 'My Scottish ancestry' was a key motivator for 9% of visitors.

History and culture were particularly important to long haul (52%) and European visitors (51%) – and a key motivator for 26% of UK visitors. 'My Scottish Ancestry' primarily appealed to long haul visitors (23%).

Regional data – Argyll and the Isles *(Argyll and Bute council area, VisitScotland 2019)*

There was a notable growth in overnight tourism to the region in 2019, by both domestic and international visitors, although particualrly fueled by a growth in domestic visits (specifically Scottish residents). The figures below provide and compare the regional annual averages over three year periods.

Visits breaddown	**Visits**		**Nights**		**Spend**	
	2017-19 average (000s)	**% Change 2016-18 / 2017-19**	**2017-19 average (000s)**	**% Change 2016-18 / 2017-19**	**2017-19 average (£000s)**	**% Change 2016-18 / 2017-19**
Europe	81	-7%	307	+14%	35	+35%
North America	39	0%	129	-16%	18	+1%
Rest of World	27	+28%	112	+50%	9	+35%
Total international overnight	**147**	**0%**	**548**	**+10%**	**62**	**+22%**
Scotland	491	+24%	1,626	+24%	88	+29%
Rest of GB	355	+10%	1,784	+18%	111	+12%
Total domestic overnight	**846**	**+18%**	**3,411**	**+21%**	**199**	**+19%**
Total overnight	**933**	**+15%**	**3,959**	**+19%**	**261**	**+20%**
Total Day Tourism	**5,538**	**+14%**	**NA**	**NA**	**182**	**+90%**
Total	**6,531**	**+14%**	**3,959**	**+19%**	**443**	**+41%**

Key findings from the data include:

- Scottish residents accounted for roughly half of all overnight trips and a third of overnight spend

- Europeans form the majorty of international travellers
- There was a very significant increase in domestic day tourism spend
- For overnight international tourists, the average stay is 4.6 nights, spend per day is £131 and spend per visit is £602. Most are on holiday (83%) and visit between July-September (48%) or April-June (33%)
- For overnight domestic tourists the average stay is 4.2 nights, spend per day is £57 and spend per visit is £236. Most are on holiday (70%) and visit between April-June (36%) or July-September (34%)
- Domestic day visitors spend an average of of £33 with the main activiites being going for a meal (0.7m) or a short walk walk (0.6m) while 400,000 visited a castle or other hsitoric site.

The 2019 Scottish Accommodation Occupancy Survey provides accommodation occupancy figures for the wider ALLFV area. These comprise:

- Hotels (% room occupancy) 74.45% (Scotland islands: 68.52%)
- Hotels (% bed occupancy) 49.43% (Scotland islands: 59.80%)
- Guest House (% room occupancy) 51.55% (Scotland islands: 50.87%)
- Guest House (% bed occupancy) 42.19% (Scotland islands: 40.27%)
- Self-catering (% unit occupancy) 54.42% (Scotland islands: 57.36%)
- Touring (% pitch occupancy) 43.12% (Scottish islands: 48.59%)
- Hostel (% bed occupancy) 50.33% (Scottish islands: 67.67%)

It is likely that Lismore accommodation figures are on average somewhere between the ALLFV and Scottish island averages.

Looking at data for visitor attractions, using the Scottish Visitor Attraction Monitor, in 2019 there were some 65million visits to attractions in total across Scotland. For this project, this may be broken down as:

Category	Total visits	National total	%
ALLFV	6,260,031	65,214,692	10%
Islands	2,417,366	65,214,692	4%
Places of worship / spiritual attractions	2,499,760	65,214,692	4%

In terms of adult / child split for visitors, children were notably less likely to visit island and places of worship attractions than attractions overall.

- ALLFV – 86/14 (adult/child split)
- Islands – 89/11(adult/child split)
- Places of worship / spiritual attractions – 90/10 (adult/child split)

Regarding the origin of visitors, the profile differs significantly between island / ALLFV attractions and places of worship.

- ALLFV – Local 22%, Other Scotland 26%, other UK 18%, overseas 26%
- Islands – Local 19%, Other Scotland 25%, other UK 32%, overseas 24%
- Places of worship / spiritual attractions – Local 3%, Other Scotland 11%, other UK 19%, overseas 67%

The Scotland Visitor Survey 2015 and 2016 (Jump Research for VisitScotland) showed that history and culture was a key motivator for 45% of visitors to Argyll and the Isles.

A selection of key comparator ecclesiastical sites are presented below with 2019 visitor figures, which add up to over 2.7million visits.

Attraction	Visits	Owner	Council	Free / Paid
St Giles' Cathedral	1,217,991	RO	Edinburgh City	Free
Glasgow Cathedral	537,415	HES	Glasgow City	Free
St Magnus Cathedral	198,516	Local Authority	Orkney Islands	Free
St Mungo Museum	159,157	Local Authority	Glasgow City	Free
Dunkeld Cathedral	88,000	RO	Perth & Kinross	Free
Church of the Holy Rude	70,228	Charity / Trust	Stirling	Free
Iona Abbey & Columba Centre	63,884	HES	Argyll & Bute	Paid
Melrose Abbey	61,325	HES	Scottish Borders	Paid
Greyfriars' Kirk	57,399	RO	Edinburgh City	Free
St Andrew's Cathedral	54,511	HES	Fife	Paid
Elgin Cathedral	37,979	HES	Moray	Paid
Jedburgh Abby	29,484	HES	Scottish Borders	Paid
Samye Ling Monastery	29,026	Charity / Trust	D&G	Free
Dunfermline Abbey/Palace	22,860	HES	Fife	Paid
Dryburgh Abbey	19,590	HES	Scottish Borders	Paid
Inchcolm Abbey	19,221	HES	Fife	Paid
Dunblane Cathedral	16,620	HES	Stirling	Free
St John's Kirk	12,057	RO	Perth & Kinross	Free
St Ronan's Wells VC	5,366	Charity / Trust	Scottish Borders	Free
Dundrennan Abbey	3,531	HES	D&G	Paid
St Serfs	2,892	HES	Perth & Kinross	Free
St Mary's Parish Church	2,393	RO	East Lothian	Free
Seton Collegiate Church	1,795	HES	East Lothian	Paid
Crossraguel Abbey	1,229	HES	South Ayrshire	Paid
Glenluce Abbey	919	HES	D&G	Paid
St Peter's Heritage Centre	746	Charity / Trust	Aberdeen City	Paid
Dalmeny Kirk	337	RO	Edinburgh City	Free
Sweetheart Abbey	325	HES	D&G	Paid

RO - Religious Organisation

Tourism on Lismore

<u>Local visitor attractions</u>

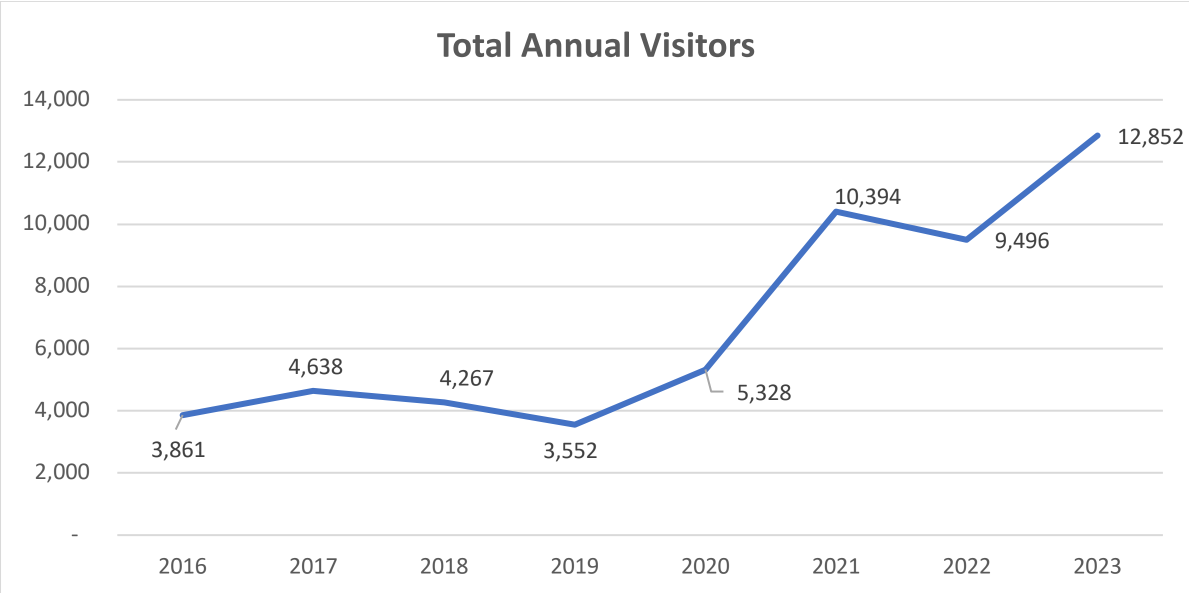
The Lismore Gaelic Heritage Centre is the main vistior attraction on the island and the only site that monitors visitor numbers. The table below provides annual total visitors to the centre when open to the wider public between April and October. Although the graph appears to show a dramatic rise in visitor numbers key aspects to note are:

- The figures for 2016 to 2019 were for the museum room only

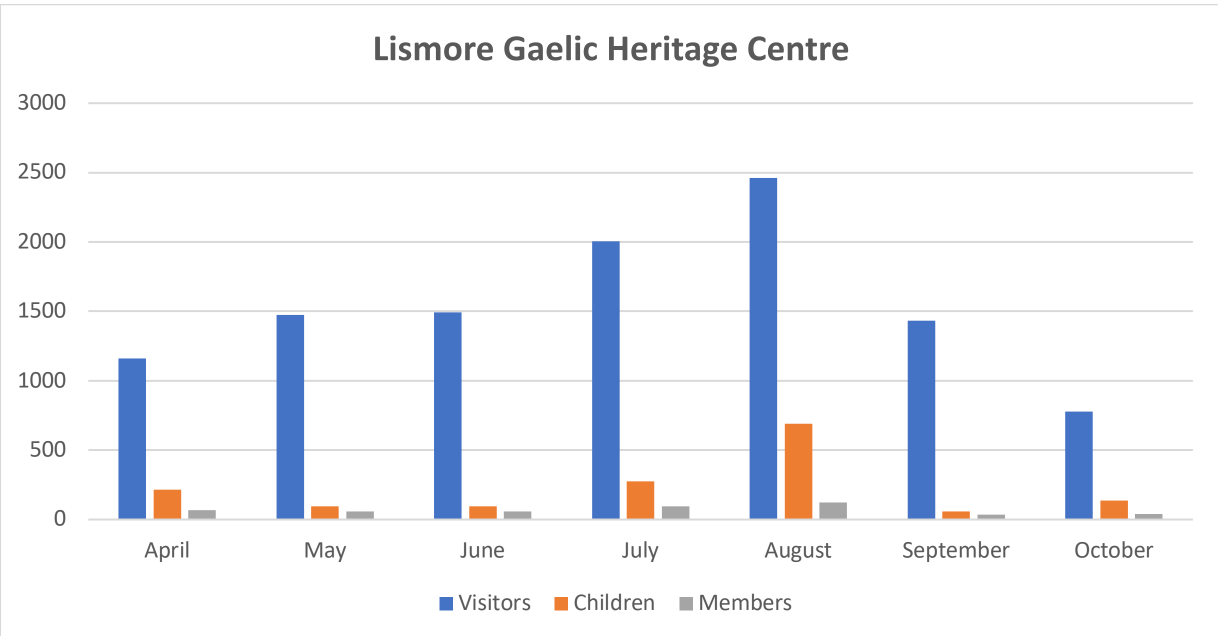
- In 2017, entry changed from a charged admission fee to a donation scheme – this has been operating since then
- In 2020 Covid-19 lockdowns closed the centre for part of the year

As a Covid requirement, contact details were recorded for entry to the Heritage Centre and café. Since Covid numbers are recorded by a volunteer on the welcome desk noting people as visitors, children and members separately.

The figures suggest around 12,000 visitor visits to the centre currently, of which perhaps around 4,000 visit the museum room. It is thought by staff that a very large proportion of visitors use the café, possibly as high as 90%.



As noted, the figures are split across visitors, children and members and are also available as monthly totals. These are presented below and show a July and August peak, with a very strong peak in August for children. It also shows that around 12% of visitors are children.



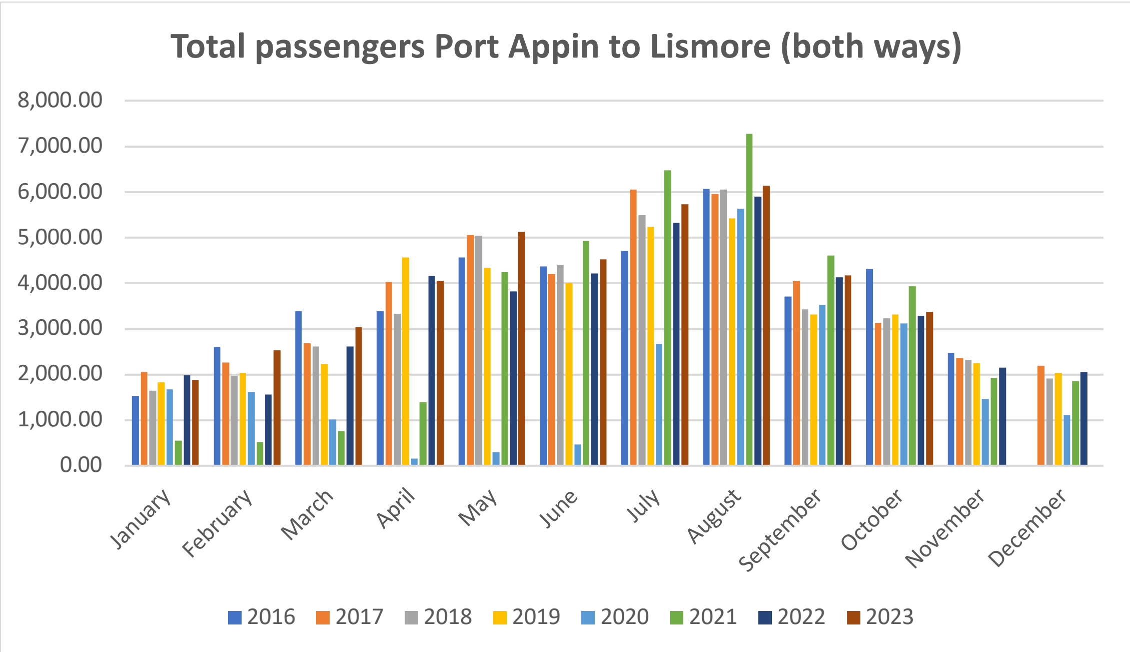
Local traffic data

There are no manual or automatic traffic count points on Lismore or at Port Appin.

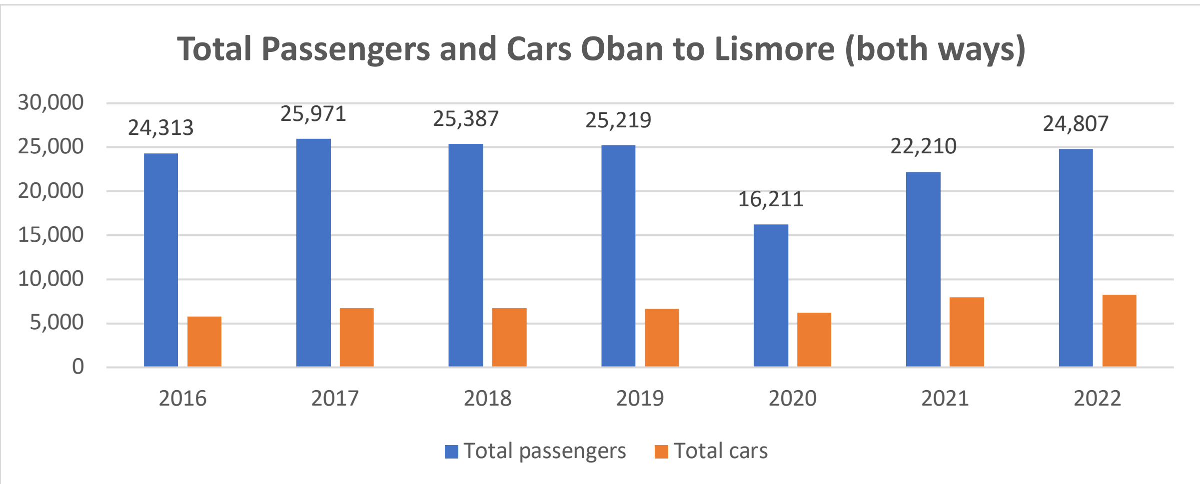
Ferry data

Often the most accurate way of measuring visitors to islands is by analysing the ferry data, although for Lismore this is complicated by there being two entry points; the Argyll & Bute Council passenger only ferry to Point and the Calmac car ferry to Achnacroish.

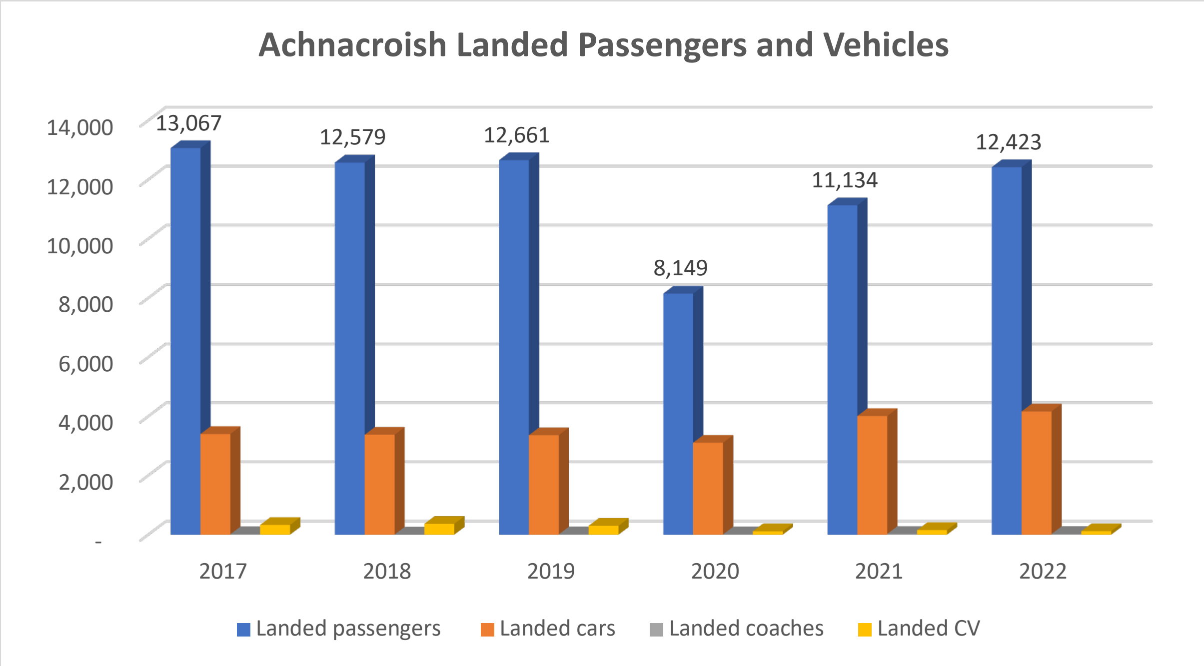
Excluding years 2020/2021, there are on average around 41,500 passenger journeys per year between Port Appin and Lismore (each way). Assuming that most people get a return ticket, this equates to around 20,750 return journeys per year.



Source: Argyll and Bute Council 2023



Source: Calmac 2023



Source: Calmac 2023

Excluding years 2020/2021 the number of passengers on the Oban to Lismore Calmac route average around 24,500 per year (2017-2022). Again assuming that all are return journeys provides a total of 12,250 return passenger journeys per year. The data for landed passengers for the same period is slightly higher at 12,683.

With the exception of the Covid years (2020/21), the data shows a stable picture for the number of passengers and trends for slightly increasing cars to the island, decreasing commercial vehicles and a low number of coaches, although these too have risen from an average of 10 per year for 2017-2019 to 24 per year for 2021-2022.

The two ferry companies combined provide a total of approximately 33,000 return passenger journeys per year to Lismore. Anecdotally, a notable proportion of visitors to the island are cyclists, mostly on a day visit cycling a loop from Oban, although there is no data to support this.

The Port Appin monthly totals show a base of around 2,000 passenger journeys per month in the winter, rising to 3-4,000 in the shoulder seasons and peaking at around 6,000 in July and August. Assuming that the winter journeys are predominantly resident / work journeys, this suggests perhaps a 40/60 split between visitors and residents / workers, and an average of around 13,200 visitors to Lismore by ferry each year. While the increased summer resident trips / work journeys and winter visitor trips will largely cancel each other out, there will still be a significant margin of error (perhaps +/- 10%) in the calculation. This provides a visitor number range of 11,880 to 14,520 visitors to the Lismore annually.

These figures broadly correlate with the Heritage Centre visitor numbers and suggest that for 2022 at least 65% of visitors to the island visited the Heritage Centre (and perhaps up to 30% visitor the museum), not accounting for multiple / repeat visits, which would reduce these visit rates.

Tourism trends

In 2014 VisitScotland introduced a market segmentation model designed to help optimize marketing spend and target communications at the right consumers within the UK. This segmentation model, still used today, identified ten market groups and highlighted five as providing the greatest return for investment for Scotland:

- Adventure Seekers
- Curious Travellers
- Engaged Sightseers
- Food-Loving Culturalists
- Natural Advocates

The segments most closely aligned to a new tourism development at the Church are curious travellers and engaged sightseers, while the wider Lismore destination will also appeal to natural advocates. There is considerable profile and characteristic data for each segment available in the VisitScotland document '*An Overview of Our Target Segments*' and only a brief summary of the priority segments is presented here[2].

Curious Travellers**:** 'Curious Travellers like to live life to the full and enjoy traveling as a hobby. They have an overwhelming desire to explore new destinations and discover new things. A holiday will often broaden their minds, educate and revitalise them'

- A real spread of ages, concentrating on the middle to upper age bands with 43% in the 25-44 age group
- Affluent
- 81% from England, many from London and the South with 9% of holiday nights in Scotland
- Mainly adult only households with only 25% having children at home

Engaged Sightseers**:** 'A love of holidays drives Engaged Sightseers to plan numerous breaks in a year. They enjoy general sightseeing and touring, taking in historical places as well as scenery and nature. They relish engaging with friendly locals and seeking out an authentic experience'

- An older age profile than other segments; typically over 45 and with the highest proportion falling into the over 65 age group of all the segments (27%). 57% are over 55 years old and 37% are retired
- Mid affluence (below average)
- 79% from England, many from the North with 15% of holiday nights in Scotland

[2] For more detail and comprehensive overview of characteristics and profile download http://www.visitscotland.org/pdf/External%20Segmentation%20Paper%20Full%20Document2.pdf

Natural Advocates: 'Passionate about Scotland as it offers everything they want from a holiday; breath-taking scenery, a connection with nature and the chance to get away from it all. A holiday in Scotland will really help them to unwind, recharge and enjoy quiet time'

- Mid affluence
- The majority fall into 35-54s
- 35% are from Scotland, with many from Northern Scotland, Central Scotland and Northern England
- Slightly more likely to be retired (18%) and have grandchildren (26%)

Recent research, largely undertaken by VisitScotland, provides useful insights on current tourism trends. These include:

Voluntourism. This group is interested in rich and diverse cultures, travelling in a sustainable manner, the green credentials of the places they visit, and in giving back and learning / sharing new skills during their leisure time. This group includes:

- Solo travellers
- Adventure tourists
- Career breakers

Recent, post-Covid, research by VisitScotland into voluntourism notes that 'voluntourism or working holidays are likely to remain an area of interest for a small number of consumers, however as the global community heals from the trauma of COVID-19, informal volunteering will become front of mind for many. Businesses should consider how they:

- Offer visitors opportunities to offset the carbon footprint of their travel or highlight how this is managed as a business
- Develop products involving authentic experiences such as chatting to an older resident about local history and heritage
- Provide opportunities for active outdoor pursuits blended with voluntary work such as beach cleans

The research suggests that the demand for responsible tourism is driven by millennial and GenZ travellers looking for short-term volunteering opportunities as part of holiday experiences. The report suggests that the greatest opportunities are in short term informal volunteering linked to local community projects, skills sharing (including formal courses) and green clean ups.

While most travel volunteering is very short term (one or two days and informal), 'voluntourism' on a larger scale is traditionally more organised, for longer periods of time and associated with gap year students – although note that there are numerous articles questioning the benefits of many of these overseas opportunities. However, there is evidence of increasing demand from older generations post-retirement or between jobs for these longer formalised 'career breaker' volunteers (although no statistics on market demand are available).

Localism and authentic experiences. This group is interested in the unique identity of a destination, crave living like a local, and creating memories discovering their own authentic Scotland. The offer should focus on the history, heritage and culture of the destination, promote local skills and craftsmanship, showcase local art or music, be at the heart of the community and respect the locals and their resources. They include:

- Hametown Tourists
- Visiting Friends and Relatives
- Safe solo travellers

Wellness tourism. This group is interested in engaging with Scotland's scenery and landscape, is looking for breaks that include wellness activities, and is interested in trying something new with family and friends, exercising together and spending time outdoors. They include:

- Aging population
- Workcation / bleisure (business-leisure)
- Families and multigenerational groups

The project also needs to consider how it can deliver on some or all of the following current trends identified by VisitScotland:

Artisan retail and food and drink: Consumers are looking to reconnect with the processes and products they use and the people producing them, both at home and as part of planned trips. Supporting small businesses forced to close during lockdown has encouraged digital adoption in these SMEs (Small to Medium Enterprises) and increased access to their products.

Transformational tourism: Driven by the mainstreaming of wellness, betterment and mindfulness, visitors want their trips to have meaning, challenge, connection and impact.

Demonstrate green credentials: Sustainability and a search for destinations that practice green principles are key concepts. Visitors are also looking for opportunities to contribute to projects that preserve culture or the environment as a way to 'give something back'.

Appeal to families: Recent research indicates that great family experiences include opportunities for 'togetherness', a chance for children to play outdoors and be active and 'shared activities'.

Appeal to young people: Recent research suggests that offers that would encourage young people to visit heritage sites include hands-on activities and a greater variety of events. The top three things young people would like heritage attractions to offer are: Virtual tours, Virtual events and social media Q&As.

Project specific markets

Pilgrimage

The British Pilgrimage Trust defines 'Pilgrimage' (n.) as: A journey with purpose on foot to holy / wholesome / special places, and lists over 20 official pilgrimage routes in Scotland:

1. Borders Abbeys Way
2. Dalriada Way
3. Edinburgh Cathedral Pilgrimage in a Day
4. Fife Pilgrims Way
5. Northern Pilgrims' Way
6. Rosslyn Chapel Way
7. St Andrew's Circuit
8. St Andrew's Way
9. St Columba's Way
10. St Conan's Pilgrims Way
11. St Cuthbert's Way
12. St Duthac's Way
13. St Magnus' Way
14. St Margaret's Way
15. St Ninian's Way
16. St Wilfrid's Way (Hexham to Edinburgh)
17. The Deeside Way
18. The Forth to Farne Way
19. The Ladywell Way
20. Three Saints Way
21. Whithorn Way

The Dalriada Way runs from Tarbert to Lismore, covering 100 miles over 8-10 days, and indeed ends at Lismore Parish Church. The establishment and growth of new routes such as the Fife Pilgrim's Way demonstrates the interest in this sector.

Pilgrimage is a key marketing hook for Argyll with Wild About Argyll with part of its website dedicated to pilgrimage https://www.wildaboutargyll.co.uk/see-and-do/castles-heritage/pilgrims/ with highlights including Davaar Island, Kilmartin, Saint Columba's Footprints, Cowal Pilgrim Trails, St Conans and of course Iona Abbey.

Destination weddings

Destination weddings continue to grow in popularity and, following the lull during Covid, the wedding sector has seen a boom period over recent years.

There were 30,033 marriages in Scotland in 2022, 24% higher than in 2021 and the highest number since 2012. Of these, 28,921 were opposite sex and 1,112 were same sex marriages and some 1,192 were in Argyll and Bute. Using data for 2019, approximately 20% of weddings are by non-residents of Scotland, including a total of 950 couples from overseas.

Although traditionally popular Scottish wedding venues, such as castles, romantic barns and rural churches, continue to dominate, over recent years there has been a growing trend towards more unusual venues, such as industrial-style buildings and breweries.

The average costs of weddings vary considerably depending upon the survey viewed. The Scottish Wedding Census noted that the average cost of a Scottish wedding in 2015/16 was £29,904 rising to £31,167 in 2016, while the Scottish wedding directory survey noted that a 2019 Scottish wedding cost £35,674 on average and is now more likely to take place in autumn rather than summer. Interestingly, a more detailed look at wedding costs show that, between 2020 and 2022, the proportion of weddings costing less than £10,000 increased, the proportion costing between £10,000 and £20,000 decreased and the proportion above £20,000 remained fairly constant.

It should also be noted that in addition to the appeal of St Moluag's Cathedral, Lismore's stunning island scenery is also a key draw. The client team notes that scenery was the main motivator for 84% of destination weddings in Argyll and Bute in 2018. (*Source: Tying the knot in Scotland: Examining Scotland as a destination wedding venue – VisitScotland Insight Dept Dec 2019*).

Spiritual retreats and wellness tourism

Research by the client team notes that wider spiritualism is also a growth area for Scotland, indeed VisitScotland has produced a Chakra map of Scotland linking potential holidays with body energy points. Further VisitScotland research has shown that protecting mental health and a need for change and connection are key motivators for holidaying in Scotland. Almost a quarter (24%) of people from the UK and Ireland took a holiday in Scotland in 2022 specifically to protect their mental health from the impact of COVID-19. Consumer spend in Scotland on wellness is £6.6 billion – 3.9% of Scotland's total economy (*The economic opportunities of the wellness economy for Scotland - Additional Research with Context Economic and Social Research May 2021*).

Lismore's slow island pace, its sense of remoteness and its combination of nature, history and welcoming spirit provides a strong sense of connection and enrichment that appeals to today's travellers.

An insight report by VisitScotland notes that wellness tourism has different connotations for different people. For some it will be the direct definition, with yoga retreats and spa breaks, while for others it might be more esoteric like physical activities like walking or mountaineering. Underpinning the trend are findings such as:

- A quarter of UK domestic visitors to Scotland in July-December 2020 "wanted something to protect (their) mental health from the impact of COVID". (visitscotland.org)
- Those domestic visitors taking wellness trips spend on average 178% more than an average domestic visitor (Global Wellness Institute 2017).
- In 2020, sales of yoga and Pilates equipment increased by 1,269% (Home gym equipment sales UK 2020 / Statista)

Traditionally, wellness has meant spa experiences and relaxation (water and massage therapies), however, more recently the role of the natural environment in addressing mindfulness and mental health. Wellness tourism can be a primary or secondary driver in a trip, often driven by the need for time-out and recovery, with products including:

- Opportunities to engage with the nature, landscapes and seascapes

- Personalised breaks including wellness activities
- Local, sustainable food

VisitScotland suggest the following wellbeing tourism opportunities or ideas:

- Soft Wellness Travel: Accommodation incorporating slow or soft wellness approaches into their agenda with the additions of Tai Chi, yoga, meditation, nature walks and healthy cooking classes.
- Re-Wilding: Retreats which focus on rewilding the human body using a combination of nature, adventure, exercise, play, rest, nutrition and mindfulness – whilst enjoying some of the world's most unique venues, handpicked for their outstanding eco-design set within the stunning natural surroundings.
- Digital and EMF Detoxing: Providing retreats where it's easy to switch off, where there's no WIFI or mobile reception, or where they actively encourage you to limit your screen time. Other wellness retreats offer dedicated detox breaks which make it easy to break your social media or screen habit surrounded by like-minded people to re-engage with people and connect on a more personal level.

The VisitScotland wellness tourism markets are identified as:

- Aging population: preventing illness and maximising wellbeing through wellness activities and holidays is of particular interest to those looking to 'age well' and remain healthy in their later years.
- Workcation/bleisure visitors: visitors looking to take ownership of their own mental wellbeing through wellness sabbaticals or the incorporation of holistic activities as part of a wider trip.
- Families: the aging population as a key driver, but the mindfulness movement is a catalyst for younger travellers too. The broad range of activities related to wellness offer opportunities for family travel and multigenerational groups; trying something new, exercising together and spending time outdoors.

Being close to water is also a major element of wellbeing and, potentially, wellness tourism. The VisitScotland report *Health benefits of being near water* provides an excellent overview of the benefits and opportunities.

Just as wellness can mean different things to different people, the offer or experience provided by spiritual and wellness retreats can vary considerably. They may include practicing meditation daily (indoors or outdoors), yoga sessions, meditative walks, detox programs, various workshops, or wellness treatments, while others may include outdoor activities such as SUP or swimming, horse riding, hiking or cycling. Some have a more spiritual and religious focus and include prayer and the structure of monastic life.

Spiritual and wellness retreats are located throughout Scotland, those listed below provide a flavour of the range of the most popular retreats currently on offer:

- Astro Crystal Astrology / Crystal healing retreats (Callander)
- Life Purpose retreat (Callander)
- Mindfulness in Nature and Forest Therapy retreat (Invermoriston)
- Mindfulness meditation programme Toadhall (Aberdeenshire)
- Nature breath (Caringorms)
- Pluscarden Abbey spiritual retreat (monastic life)
- Transformational Women's retreat (South Queensferry)
- Yoga retreats (Dunglass, Dollar and Isle of Skye – mindfulness yoga sound bath women's retreat)

Although there is no market data available on demand, the Facebook group 'Spiritual events in Scotland' has over 5,000 members and actively promotes networking and the encouragement of greater spiritual community in Scotland. https://www.facebook.com/groups/977984912272241/. It demonstrates the variety, scope and popularity of the sector.

Workshops and courses

The workshops and courses sector is extremely varied, ranging from workshops that may only last a few hours to residential courses lasting weeks, and providing a comprehensive overview of the sector is a major study in itself.

Even just looking at heritage and cultural courses, the sector is extensive and largely uncoordinated in its promotion. Workshops and courses are most often promoted and delivered by dedicated venues and organisations like Historic Environment Scotland's Engine Shed in Stirling, which specialises in building conservation, as does the Scottish Traditional Skills Training Centre in Turriff, The Scottish Lime Centre in Charlestown and the traditional skills training programme by the Perth and Kinross Heritage Trust.

Larger dedicated training centres like Gartmore House provide an extremely wide range of courses including craft and activity holidays (e.g. knitting, patchwork and art courses) as well as archaeology workshops and courses.

Although the sector is largely uncoordinated in its promotion of events operated by individual organisations, there is some shared promotion of heritage craft activities through sites such as Craft Courses and Craft Scotland, the latter listing 38 heritage craft workshops and courses in Scotland between January and March 2024.

In terms of wider cultural courses, popular options include singing, creative writing, poetry, art, music and photography and are located in venues throughout Scotland. Many of these are also connected to artist residencies or larger residency establishments, maximising the use of spaces and facilities.

An interesting facility close to Lismore is the Rockfield Centre in Oban. Purchased by the Oban Communities Trust to provide a cultural hub delivering four themes: Arts and Culture; History and Heritage; Community Wellbeing; and Education and Enterprise. Interestingly the centre is also home to the Young Archaeologists Club.

The archaeology workshop / training sector (an area particularly appropriate for Lismore) is large and varied but there is also considerable competition, from well-established providers such as Gartmore House and major organisations such as NTS, Archaeology Scotland, archaeological units, UHI and Universities. It is also worth noting that many of the public archaeology workshops are free to users, funded through project grants. From the rapid review undertaken, it is clear that if courses and workshops are to be income generating, they cannot be focused purely on heritage and will need to have wider public interest covering nature, culture and craft / hobby courses.