

Local Development Plan Charrette Report

Appendix D - Visitor Development Opportunities

May 2013

VERSION CONTROL			
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1.0	Draft Final	7 th May 2013	-
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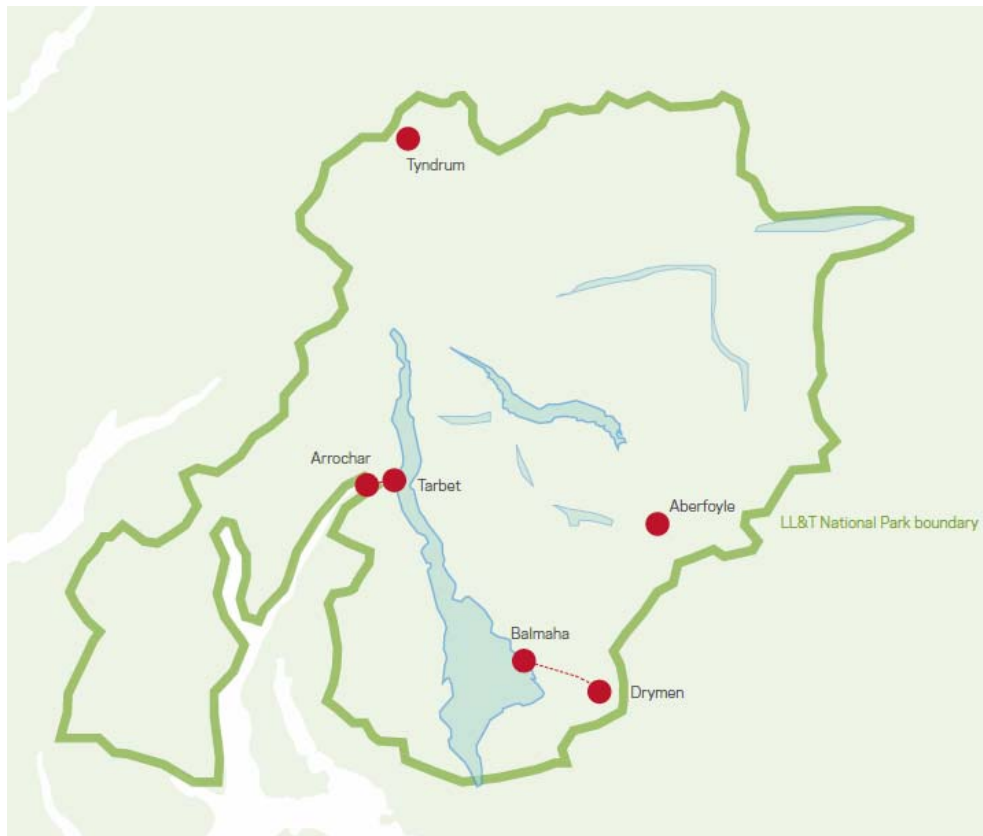
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1.0 INTRODUCTION

1.1 Introduction

This report considers four separate settlements in the Loch Lomond and Trossachs National Park and their future roles and contributions to the visitor economy. The report should be read in conjunction with the design proposals contained in the Charrette Report prepared by the Charrette Design Team comprising Jura Consultants, 7N Architects, Parsons Brinkerhoff, DPT Urban Design and BRE. The settlements are shown on the following map:



This assessment of these settlements and their current and future contributions to the visitor economy of the National Park has been made in the context of the preparation of the Local Development Plan. The local development plan preparation has used the Charrette process to engage with the local communities in each of the settlements.

1.2 Charrette

A Charrette is a design based community engagement exercise. This Charrette has been commissioned by the LLTNPA and funded by the Scottish Government. The Charrette involved a fact finding visit to each community and meetings with representatives from the Community Councils and other groups concerned with the development of their settlements. Following these fact finding visits the Charrette Design Team developed proposals for the future development of

the settlements. These proposals included a vision for the settlements and their future roles in the visitor economy. These proposals were presented to the community in a series of feedback sessions and subsequently refined.

1.3 Public Engagement

The Charrette has allowed the Charrette Design Team to engage with local residents, local businesses and in some cases visitors to the National Park. In addition, we have had access to visitor market research conducted by the LLTNPA and tourism market research conducted by Visit Scotland.

1.4 Report Structure

This report is structured as follows:

Section 2	Visitor Overview
Section 3	Aberfoyle
Section 4	Arrochar, Succoth, and Tarbet
Section 5	Drymen and Balmaha
Section 6	Tyndrum
Section 7	Summary

2.0 VISITOR OVERVIEW

2.1 The National Park Visitor Economy

The National Park has an area of 720 square miles and a resident population of some 15,000. Some 2,400 people are employed in tourism and recreational activities and these account for one-third of all jobs in the National Park. Many of these jobs are accounted for by accommodation providers, of which there are around 400. The Park attracts 4 million visitors and 7 million visitor days per annum. These are primarily leisure visitors although business tourism and weddings are important markets. Just over 50% of the leisure market are day visitors and just under 50% are overnight visitors, staying on average 4.4 nights. Day visitors are unsurprisingly mainly Scottish residents. Overnight visitors are predominantly from the rest of the UK and overseas. There are some 19,000 bedspaces in the National Park. These include serviced accommodation (5,796 bedspaces), self catering (6,000 bedspaces) and holiday parks (7,520 bedspaces).

The motivations for visitors include sightseeing and active sport. The National Park boasts 21 readily accessible Munros, including Ben Lomond, and 19 Corbetts; 23 lochs including Loch Lomond the largest freshwater loch in Scotland; and a wealth of paths and trails for cycling, walking and running including Scotland's premier long distance trail The West Highland Way, a well established international draw (32,000 people complete it each year) and National Cycle Route 7. Scenery and lochs are a key factor for the majority but visitors tend to cite multiple reasons based on their own specific interests. However, currently only a minority take part in activities. Survey evidence indicates that walking and general sightseeing are the primary activities undertaken.

The National Park status also influences visitors' decisions to visit. Visitors are also attracted by heritage and culture, food and drink and events. Survey evidence reports that the top 3 things visitors would like to see more of are: better toilets; walks; and places to eat. A VisitScotland survey in 2012 reported the following findings in relation to the LLTNP visitor experience:

- Top reasons for visiting: particular interest in scenery (39%); is an area I know well (23%); to visit a particular attraction (20%)
- Most visitors stayed in: a hotel (37%); followed by B&B/Guest House (15%); self catering (14%); caravanning (13%); and camping (10%)
- Most popular activities are: sightseeing (41%); short walk/stroll (40%); long walk/hike (36%); and trying local food (35%)
- Most visitors ate out in: cafes (70%) ; pubs and bars (58%); good quality restaurants (42%)
- Aspects 'very satisfied' with: overall experience of VisitScotland Info Centres; friendly service in accommodation; and information locally on places to visit
- Less satisfied ratings recorded for: mobile phone reception; Wi-Fi and broadband access; availability of low cost accommodation; and the cost of travel
- 91% satisfied, 95% definitely/probably will recommend LLTNP (69% definitely/probably in the next 5 years)

2.2 National Park Partnership Plan

The National Park Partnership Plan for the period 2012 to 2017 sets out the following aims for Scotland's National Parks:

- to conserve and enhance the natural and cultural heritage of the area
- to promote sustainable use of the natural resources of the area
- to promote understanding and enjoyment of the special qualities of the area by the public
- to support sustainable economic and social development of the area's communities

The Partnership Plan aims to increase the quality of the public infrastructure in the National Park to generate greater business activity to meet the Scottish Government's core purpose of creating a more successful country through increasing sustainable economic growth.

The Plan recognises that the LLTNP is the busiest area of countryside in Scotland and that the current infrastructure is not sufficient for a modern destination. There is recognition of the following challenges for the National Park:

- Insufficient investment in underlying visitor infrastructure to cope with visitor pressure
- Not enough high quality facilities for the visitor
- A lack of knowledge of recreation opportunities such as walking, cycling, etc.
- Need to develop seamless visitor experiences, ensuring activities are easy to access
- Myriad of confusing orientation information including multiple websites
- Greater potential to use association with the National Park brand to add value to local businesses
- Enormous potential to promote the National Park as a destination
- Accessibility of the National Park can lead to overcrowding in specific locations
- Potential for improvements to scenic routes, viewpoints and public transport;
- Need for improved understanding of who the NP visitor is
- Customer service needs to be improved including professionalism and product knowledge;
- Ensure visitors have an experience which matches the world-class landscape.

2.3 The National Park Tourism Strategy (Draft)

The National Park has prepared a Tourism Strategy. It sets out the following vision and aims:

Vision:

"A high quality, authentic experience for visitors with many opportunities to appreciate and enjoy the natural and cultural heritage within an internationally renowned landscape that compares to the best on offer around the world"

Strategic Aims:

- To be an inspiring sustainable destination that is responsive to changing customer expectations
- To address the development of infrastructure and tourism facilities to meet visitor needs and compete effectively
- To create an environment for growth of new products and sustainable tourism businesses which are committed to offering quality service
- To develop a distinctive sense of place

The Tourism Strategy highlights the current VisitScotland visitor profiles which have been identified as providing the best return on investment for Scotland's tourism industry. The National Park currently addresses two of these segments. These are:

- **Mature Devotees:** enjoy visiting Scotland to explore the local area and culture, this segment is typically 50 plus, low disposable spend and prefers to sightsee from car or coach.
- **Affluent Active Devotees:** typically 50 plus, enjoy good food and drink and active pursuits and like to stay in boutique hotels.

While wishing to maintain these markets the National Park Tourism Strategy has identified the following additional market segments as priorities for development:

- **Younger Domestic Explorers:** average age 42, work to live, busy lives, looking for escape from routine, relax and explore, masses to see and do, and good value. Interests include sightseeing, culture, festivals, active sports and family attractions. Want to use good value self-catering.
- **Affluent Southern Explorers:** most affluent segment, wide age range but average age 45. Looking for authentic experiences. Keen to explore local culture, and get off the beaten track. Interests include walking, wildlife, nature, culture and festivals. Variety of accommodation.
- **Better Off Traditionalists:** average age 51, with above average income. Traditional values. Prefer going abroad but if UK look for strong cultural element. Interested in sightseeing, national parks, and hiking. Preference for hotels and like quality.

2.4 Summary

These key documents set out the strategic context for visitor development opportunities in the National Park. The specific development needs and opportunities for each settlement set out in the subsequent sections of this report are considered against this strategic context.

3.0 ABERFOYLE

3.1 Introduction

Aberfoyle is an important gateway to the Trossachs and provides services for wider Strathard, including the village of Kinlochard and the settlements of Inversnaid and Stronachlacher. The Charrette focuses only on the village of Aberfoyle but recognises its wider role.

3.2 Current Situation

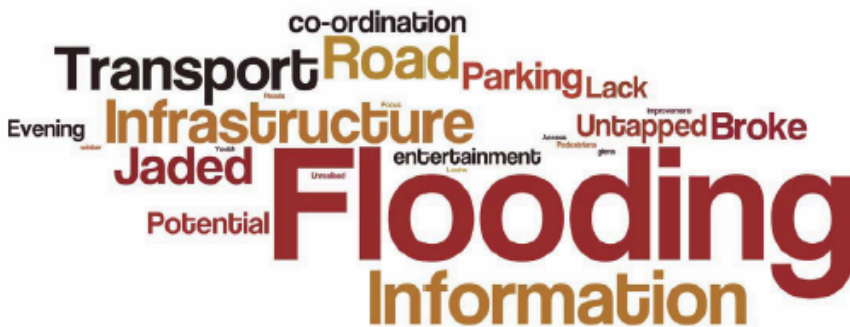
Aberfoyle has a population of some 600 residents. The fact finding workshop with the local community elicited the following responses:

Fact Finding Information

Good things about where you live



Not so good things about where you live



Local residents were extremely concerned about the impact of recent flooding on the village and the likelihood that such events would be repeated in the absence of any intervention or change to ensure that such events did not have such devastating consequences.

3.3 Needs and Opportunities

Aberfoyle has historically been a popular destination for tourists and day trippers. The volume of tourists has resulted in a significant number of accommodation providers in the village with a considerable number of bedspaces. In addition to the hotels, guest houses, and bed and breakfast establishments, there are self-catering and camping and caravanning. There are estimated to be in excess of 100,000 tourists and over 300,000 day-visitors visiting Aberfoyle per annum.

The most significant visitor attractions include David Marshall Lodge Visitor Centre which attracted 120,000 visits in 2011. This is currently undergoing a refurbishment and will reopen for the 2013 season. David Marshall Lodge Visitor Centre also hosts a Go Ape experience. The Trossachs Discovery Centre situated in the heart of the village attracted 90,000 visits in 2011. Aberfoyle is the gateway to the Queen Elizabeth Forest Park.

Unlike Tyndrum and Arrochar, Aberfoyle does not receive passing trade. All visitors have selected Aberfoyle or Strathard as their destination.

3.4 Visitor Development Strategy

Aberfoyle continues to provide many of the features of an attractive destination for those with a keen interest in the outdoors. Aberfoyle has the potential to develop as:

'a short break destination for those who love the outdoors'.

The market that Aberfoyle can appeal to is the family market, those with younger children and older grandparents. The access to the natural beauty of Strathard, Loch Katrine and the Queen Elizabeth Forest Park presents an ideal short break destination.

The refurbishment of the David Marshall Lodge Visitor Centre and the successful introduction of Go Ape provides an ideal opportunity to develop short break packages using local accommodation providers and other service providers. The accommodation stock would benefit from more flexible family accommodation. Typically lodge accommodation with between 6 and 8 bedspaces would appeal to the family market. There is also an opportunity to provide best in class serviced accommodation in the Hotel and Guest House sector.

Forestry Commission Scotland produces some excellent guides to the Queen Elizabeth Forest Park. However, the task of selling Aberfoyle as a destination will require the development of itineraries to demonstrate how a variety of activities and locations in and around Aberfoyle can be

enjoyed during a 3 or 4 day break in Aberfoyle. These should consider how different groups can use the outdoors and the local services, including local restaurants and shops.

The high priority shortbreak markets for Aberfoyle are as follows:

Existing Market Segment

- **Affluent Active Devotees:** typically 50 plus enjoy good food and drink and active pursuits and like to stay in boutique hotels.

New Market Segment

- **Younger domestic explorers:** average age 42, work to live, busy lives, looking for escape from routine, relax and explore, masses to see and do, and good value. Interests include sightseeing, culture, festivals, active sports and family attractions. Want to use good value self-catering.

The lower priority shortbreak markets for Aberfoyle are as follows:

Existing Market Segment

- **Mature Devotees:** enjoy visiting Scotland to explore the local area and culture, this segment is typically 50 plus, low disposable spend and prefers to sightsee from car or coach.

New Market Segment

- **Better Off traditionalists:** average age 51, with above average income. Traditional values. Prefer going abroad but if UK look for strong cultural element. Interested in sightseeing, national parks, and hiking. Preference for hotels and like quality.

3.5 Attractors, Facilities and Services

Aberfoyle has a number of visitor assets that can be used to develop the new visitor market segments and include the following:

Services

Hotels	Camping and Caravanning
Guest Houses	Watersports at Loch Ard
Bed and Breakfast	Mountain Bike Hire
Self catering	Fishing

Attractions

Queen Elizabeth Forest Park	Loch Ard
David Marshall Lodge Visitor Centre	Loch Katrine
Go Ape	Loch Conn
Trossachs Discovery Centre / TIC	Loch Arklet
Aberfoyle Golf Club	Scottish Wool Centre

Events Programme

Infrastructure and Routes

QEFP trails

National Cycle Network Route 7

Rob Roy Way

Three Lochs Forest Drive

Mary Queen of Scots Way

The visitor product development required to attract the short break market from the key market segments is accommodation of a suitable format and quality, e.g. self-catering lodges and boutique hotels. The accommodation offer will need to be supported by restaurants and access to outdoor activities.

3.6 How to develop this

The development of Aberfoyle as a short-break and day visitor destination will be given a major boost by the completion of the refurbishment of the David Marshall Lodge Visitor Centre. This will act as an attraction in its own right, as a gateway to the Queen Elizabeth Forest Park, and as a host site for Go Ape. However, Aberfoyle main street will require to be upgraded to make it a more attractive place for visitors to browse.

The provision of appropriate accommodation to meet visitor needs will be critical to the future development of Aberfoyle as a short break destination for those who love the outdoors. This will require self-catering accommodation and serviced accommodation offering value for money and being 'best in class'. The scale of these interventions is difficult to gauge but adopting a planning horizon to 2020 and assuming a growth in volume of 2.5 percent per annum there would be a need for an additional 90,000 additional bednights. This would require up to 45 additional lodges assuming a capacity of 8 persons per lodge and an appropriate target occupancy.

The provision of best in class serviced accommodation in the Hotel and Guest House sector is similarly difficult to gauge and is more likely to involve the upgrading of existing operations to reflect the changing market demand. The term boutique hotel is used to describe the market segment identified by VisitScotland. While this is frequently taken to reflect a particular size of hotel the real defining quality of a boutique hotel is the atmosphere, ambiance and personal service. Over the period to 2020 the opportunity for at least two boutique hotels of some 20 bedspaces each to respond to the 'affluent active devotees' is considered realistic.

4.0 ARROCHAR, SUCCOTH AND TARBET

4.1 Introduction

The Charrette is concerned with the villages of Arrochar, Succoth and Tarbet. We acknowledge that the concurrent Community Action Plan process includes Ardlui, with questionnaires distributed to Ardgarten, Morelaggan and Firkin.

4.2 Current Situation

The population of the three villages is reported to be some 1,000 residents. The fact finding workshop with the local community elicited the following responses:

Fact Finding Information

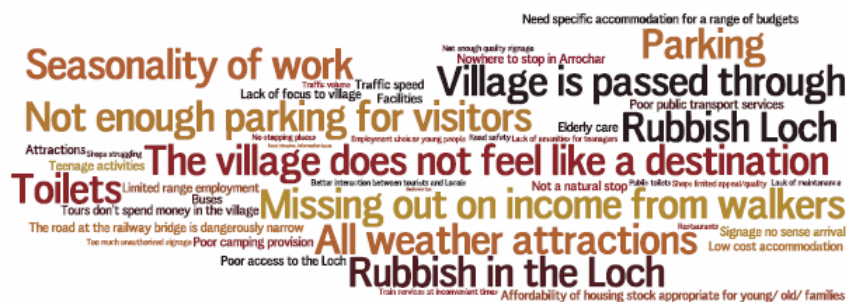
Where you see your community in 30 years time?



Good things about where you live



Not so good things about where you live



This feedback echoes the feedback in the more extensive survey of residents and local groups undertaken for the updating of the Community Action Plan.

The local economy has continued to weaken as a result of the continuing loss of local employment and training opportunities. The lack of local employment opportunities is exacerbated by the poor public transport provision resulting in further pressures for residents to relocate temporarily or permanently for employment. The recent improvement in rail services is welcomed but this is unlikely to be sufficient to address this significant problem.

Arrochar and Tarbet attract both day-visitors and tourists. The local hotels are an essential part of the local visitor economy. However, the three villages are viewed by many visitors, especially day-visitors as somewhere to pass through on their way to Loch Fyne, the Rest and be Thankful, Inverary, Lochgilphead or Oban. It is not sufficiently far enough into their journey to act as a potential stopping point or sufficiently attractive to act as a destination in its own right. The Loch Fyne Oyster Bar and Inverary are destinations and benefit from passing traffic pausing to use the local services.

Visitor expenditure from both day-visitors and tourists is critical to the future of the local economy. However, this is considered to be under threat and Arrochar and Tarbet must improve its appeal, attractions, services and infrastructure if it is to survive and develop its tourism and leisure activities.

4.3 Needs and Opportunities

The economic need for the Three Villages is to improve the performance of the tourism and leisure economy. This will require the development of the local infrastructure, attractions and services. Specific demands from the community were to maximise the impact of the existing infrastructure, attractions and services and included the following:

- Clean the beaches and shoreline
- Clean the area at the head of Loch Long
- Enhance the footpath network
- Improve the appearance of the villages
- Reduce the impact of the A83 on the villages
- Reduce the speed of traffic both through and between the villages
- Further improve the public transport links
- Increase parking provision

There is also a demand to extend the local attractions to increase the level of visitor activity from day-visitors and tourists. Particular suggestions included the following:

- A visitor centre
- Public Toilets

- Seating
- Floral displays
- A pier
- Pontoons and marina

The visitor centre is viewed as a means of providing information to visitors about the cultural heritage and orientating visitors to allow them to maximise their enjoyment in Arrochar, Tarbet and Succoth. Such a facility could also provide public toilets, a cafe and additional facilities for those visiting by boat / ship, depending on its precise location.

The proposed development of the former Royal Naval Torpedo Range Arrochar as the Ben Arthur Resort is seen by the local community as an opportunity to extend the visitor economy. The development will include a 4 star hotel and associated leisure and residential facilities but for Arrochar, Succoth and Tarbet to benefit from this development it needs to have the appropriate links with the resort. This would include an attractive and safe footpath from the resort to the villages and pontoons to allow transfer of visitors across Loch Long.

4.4 Visitor Development Strategy

The Three Villages need to attract more visitor expenditure from day-visitors and tourists. To do this the villages need to be made significantly more attractive and present a stronger visitor product with appropriate attractions, services and infrastructure. While some of this exists it is constrained by a variety of factors and that which does not exist needs to be developed. When the Ben Arthur Resort development occurs this will provide a significant opportunity for the local visitor economy to benefit from additional income, employment and expenditure. However, the timing of the development is uncertain and the local visitor economy cannot afford to sit back and wait for this and must proceed with a Visitor Development Strategy which is independent of the Ben Arthur Resort.

The strategy must include enhancing the existing attractions, services and infrastructure and adding to these strategically to enhance the visitor product. The strategy is encapsulated in the following vision for the Three Villages:

'A day trip destination for adventure seekers'

This builds on the locational advantages of the Three Villages located adjacent to the Arrochar Alps, Loch Lomond and Loch Long.

4.5 Attractors, Facilities and Services

The Three Villages have a significant number of assets that can be used and/or enhanced to develop the visitor economy. These include the following:

Services

Hotels	Camping and Caravanning
Guest Houses	Cruise Loch Lomond
Bed and Breakfast	Loch Lomond Seaplane
Self catering	Fishing

Attractions

Arrochar Alps	Mansefield Studios
Loch Lomond	Local Archaeology
Loch Long	

Infrastructure

Arrochar and Tarbet Railway Station	Stronafyne Loop
Argyll Forest Park / Ardgarten	The Cobbler
Glen Loin Footpath	Cat Craig Cycle Loop
Tarbet Loop	Ardgarten Peninsula Circuit
Arrochar Walk	Three Lochs Way
Succoth Burn	

The visitor product development required to attract the day-visitor and tourist markets include the creation of a much stronger sense of place that links the villages with each other, improves the visual amenity of each village, and enhances the linkages with the wider environment. These developments need to be supported by some critical infrastructure developments. These include increased car parking in the villages to enable and encourage visitors to stop and interrupt their journeys. The development of waymarked paths to allow visitors to explore the villages, their surroundings and extend the excursions into the landscape on foot and on bike. The development of piers and pontoons to allow visitors to see Arrochar and Tarbet as synonymous with access to the Lochs: Loch Lomond and Loch Long.

For these visitor product developments to have the desired impact it will be critical that visitors have access to information about the path network and local services. This needs to be available in each village and, critically, accessible to visitors before they decide to make their trip. A comprehensive web based resource providing details of the local path network and local services is required to promote the Three Villages as a visitor destination. The existence of the railway station provides an opportunity to promote rail access to the Three Villages with the creation of suitable itineraries based on participation in local activities and based around the available public transport network and their timetable of services.

In the short term the target visitor markets are the retention of the existing tourists and day-visitors and a greater penetration into the day-visitor market and the passing-trade that is travelling through the National Park.

4.6 How to Develop This

The development of the Three Villages as a visitor destination will require the enhancement and introduction of attractions, services and infrastructure. The priorities for the Three Villages are public realm improvements to signal to potential visitors that the Three Villages is changing and creating an attractive destination. These improvements need to include car parking and an improved path network between the villages, the railway station, the head of Loch Long and the Ben Arthur resort. These then need to be supported with a visitor attraction to provide orientation information to all visitors and promote the cultural heritage of the area. Access to Loch Long needs to be reintroduced with either a pier or pontoon to allow water access and encourage the provision of water services.

In the absence of these infrastructure improvements it is difficult to see how Arrochar and Tarbet will change its relationship with tourists, day visitors and passing traffic. With these infrastructure improvements, particularly visitor parking, water access, an integrated path network, and an attraction, the experience for current visitors can be enhanced and provide a platform from which to alter the perception of Arrochar and Tarbet and the performance of the visitor economy. This in turn would provide new opportunities for service providers in the hospitality and retail sectors. However, it is clear that the infrastructure improvements are a prerequisite to the creation of future development opportunities in the accommodation, food and beverage and retail sectors.

5.0 DRYMEN AND BALMAHA

5.1 Introduction

The Charrette is concerned with the villages of Drymen and Balmaha. We acknowledge that the concurrent Community Action Plan process is focused on Drymen.

5.2 Current Situation

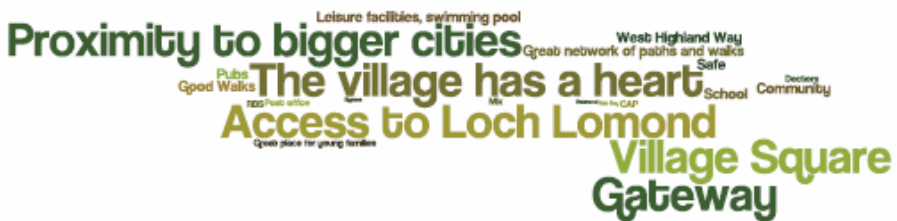
Drymen and Balmaha have a population of some 700. The fact finding workshop with the local community elicited the following responses:

Fact Finding Information

Where you see your community in 30 years time?



Good things about where you live



Not so good things about where you live



This feedback echoes the feedback in the more extensive survey of residents and local groups undertaken for the updating of the Community Action Plan.

The visitor economy is extremely important to the economy of Drymen and Balmaha with the provision of hotels, guest houses and bed and breakfast establishments providing a significant concentration of serviced bedspaces. There are also a number of public houses, restaurants, retail outlets and service providers all servicing day-visitors, tourists and local residents. Drymen and Balmaha are situated close to the route of the West Highland Way, one of Scotland's premier long distance walking routes and benefits from an influx of seasonal walkers. An estimated 80,000 people start the West Highland Way each year. Drymen is also on the National Cycle Route 7 and marks the start of the Rob Roy Way to Pitlochry.

The proximity of Drymen and Balmaha to Glasgow allows local residents to commute to work in the city. However, this accessibility works in reverse allowing Glasgow residents to gain easy access to Drymen and Balmaha. The villages can become overrun with day-visitors during peak periods when the weather is good.

5.3 Needs and Opportunities

The visitor economy of Drymen and Balmaha relies on day-visitors and tourists. However, the volume of day-visitors is considerable and significantly higher than the volume of tourists. For the visitor economy of Drymen and Balmaha to continue to develop both day-visitors and tourists will continue to play a part.

The residents of Drymen have identified through the Community Action Plan that they see the village as a 'Hub for visitors and a gateway to East Loch Lomond'. To achieve this 'Drymen will continue to thrive from and develop its historic role as a hub for visitors – whether they arrive on foot, bike, or car. It will be a welcoming and attractive place to visit, as well as making the most of its role as a gateway to East Loch Lomond and the West Highland Way'.

To enable Drymen and Balmaha to deliver this role as a hub will require an ability to manage the demands of day-visitors and tourists. The removal of the public toilets is a concern given the significant volume of day-visitors and the lack of visitor information means that visitors are not informed fully about the attractions, events, activities and services that are available in Drymen and Balmaha. Drymen requires improved car parking, public toilets, a range of visitor activities and enhanced public transport services.

The Square in Drymen is recognised by residents and visitors alike as one of the key assets and is owned by the community. Over time the quality of the Square has been eroded and it would benefit from an upgrade to reinstate it as a high quality space.

The route between Drymen and Balmaha will be experienced by many visitors and depending on the time of year and the weather conditions this can be a slow and congested route with no

alternative means of access. The opportunity to create an alternative path for walking and cycling between Drymen and Balmaha would also allow Drymen to offer enhanced pedestrian access to the loch shore, reinforcing its role as the Eastern Gateway to Loch Lomond. Balmaha is a small settlement but it provides visitor services and views of Loch Lomond. Visitors can also access Inchcailloch, the largest island of the Loch Lomond National Nature Reserve. Visitors can also access Balmaha by Waterbus from Balloch and Luss. The potential to promote and/or extend the Waterbus services could assist the alleviation of vehicular congestion between Drymen and Balmaha at peak times by encouraging their greater use.

5.4 Visitor Management Strategy

Drymen and Balmaha, in contrast to the Visitor Development Strategies for the other Charrette villages, requires a Visitor Management Strategy to allow it to cope with the influx of day-visitors and tourists and continue to provide a high quality visitor experience. The critical elements of this will be to balance initiatives to manage existing visitors and attract new visitor markets.

5.5 Attractors, Facilities and Services

The local path network already includes a number of walking and cycling routes. These should be extended to enhance access with the following routes:

- Drymen to Loch Lomond multi-use path
- Drymen to Balmaha multi-use path
- Drymen to Croftamie multi-use path
- Waterbus Balloch to Balmaha

The supporting visitor management initiatives in Drymen and Balmaha should include the following:

- Additional car parking
- Public Toilets
- Visitor orientation and information services

The enhancements to support the visitor economy should include:

- Drymen village Square improvements
- Drymen Conservation Area Renewal
- Camping sites adjacent to the villages

5.6 How to Develop This

While much development work has been undertaken on the Drymen village Square this needs to be brought to a conclusion with a deliverable, fundable and attractive scheme. This should be implemented as soon as possible. The extension of the local path network to provide access to Loch Lomond and onwards to and from Balmaha would be one part of a sustainability strategy to develop alternative means of accessing Balmaha without resulting in congestion between Drymen and Balmaha. The opportunity for waterbus access from Balloch or other suitable location should be investigated and trialled on potential peak days. Managing vehicles in Drymen will be essential to ensure a quality visitor experience. The provision of car parking and management of car parking will be vital to the quality of the day visitor experience.

6.0 TYNDRUM

6.1 Introduction

Tyndrum is the most northerly settlement in the National Park. The settlement has a population of some 170. This population is greater (approximately 500 residents) if the settlement is linked with Crianlarich with which it shares a great deal, including the school. However, the Charrette is focused only on Tyndrum.

6.2 Current Situation

Tyndrum is a well known destination to many Scottish residents and visitors. It is particularly well known to hill walkers from both ends of the Central Belt and points north. Its level of recognition is matched by a level of use as a convenient stopping point en route to somewhere else, typically Glencoe and Oban. Traffic counts on the A82 indicate over 2 million vehicle counts per annum, a potential of over 1 million return journeys per annum. The volume of coaches using the route is estimated at 25,000 per annum. This is one of the busiest routes in the National Park. It also functions as an overnight stop for visitors, with the West Highland Way acting as a key driver of overnight visitors. The local coaching hotels also bring overnight visitors and deliver a strong experience. While some visitors do use Tyndrum as a destination for a day trip and some stay overnight, it is overwhelmingly a convenient stopping point with the average visitor dwell time likely to be modest and well short of 3 hours that would mark the location as a day-trip destination.

There are a number of local businesses that meet the very clear demand from visitors. The Green Welly and the Real Food Cafe meet the very obvious needs for food, drink, parking, and toilets.

The fact finding workshop with the local community elicited the following responses:

Fact Finding Information

Where you see your community in 30 years time?



Good things about where you live



Not so good things about where you live



Tyndrum is heavily reliant on the visitor economy to support its economic activity. The A82 provides a level of demand that varies with the seasons and the West Highland Way delivers a further stream of seasonal demand. The Highland Heritage Hotels (The Royal Hotel and the Ben Doran) provide employment but their visitors have only limited other impacts on the local economy.

6.3 Needs and Opportunities

There is a need to improve the amenity of Tyndrum and encourage those passing through to break their journey and to increase their dwell time and expenditure in the village. However, to achieve this traffic would have to be slowed to make the main street feel safer for pedestrians and the amenity of the main street improved to effectively link the main retail and service outlets at either end of the village with the seasonal Tourist Information Centre. These improvements would increase the average dwell time but this is unlikely to increase to the point where it was a recognisable day-trip destination. Significant increases in dwell time would require the development of an attractor, such as a heritage centre or other opportunity to engage with the passing trade and encourage them to explore the village and surrounding area.

The proposal to open a gold mine at nearby Cononish has presented the community with an opportunity to capitalise on the public interest in gold mining and in Cononish. The precise timing

of the commencement of mining operations remains uncertain but the community is interested in developing its mining heritage which extends much further back in time than the recent gold mine and includes earlier lead mining in the surrounding area.

The Community Development Trust is keen to develop proposals for a mining heritage attraction to capitalise on the Gold Mine should it proceed. The scale of the proposed attraction requires a feasibility assessment but a Mining Heritage visitor attraction has the potential to attract visits from passing trade and to attract visitors to Tyndrum.

In the absence of the Mining Heritage attraction it is difficult to see what developments will allow Tyndrum to develop the visitor economy. Further initiatives to attract visitors should include replacing the current public toilets and introducing a play park for local children and visitors.

6.4 Visitor Development Strategy

Tyndrum will continue to be one of the busiest routes into, out of, and through the National Park. It has potential to encourage those passing through to spend more time exploring Tyndrum and some further potential to develop the existing day-visitor market.

Tyndrum is popular with walkers, not only those undertaking the West Highland Way but those looking for Munros and low level walks. The prospect of a Mining Heritage attraction to explain and encourage exploration of the in-situ mining heritage in the local area provides an opportunity to attract day-visitors and provide something to engage those passing through.

6.5 Attractors, Facilities and Services

Tyndrum has more local services than may be expected in a village of 174 people and these are supported by passing trade. The Green Welly Filling Station and Restaurant provides a service to the significant volume of traffic coming to, or from, Oban and Fort William. The Real Food café services the same market while Brodies Mini Market in addition serves the local market.

Tyndrum has the benefit of a seasonal TIC. It has two railway stations, Tyndrum Upper and Tyndrum Lower. Tyndrum Lower is on the Oban line and Tyndrum upper is on the Fort William Line. Trains heading south frequently join at Crianlarich and trains going North frequently split at Crianlarich.

6.6 How to Develop This

The development of the Mining Heritage visitor attraction needs to be investigated to determine the appropriate location and scale of attraction. To be of benefit to Tyndrum and attractive to visitors a location in the village would be essential. This may be a site on which to develop a new building or an existing building which could be converted and/or extended.

7.0 SUMMARY

7.1 Introduction

The Charrette process has engaged with some of the smallest villages in the National Park. The current visitor markets comprise staying visitors (tourists), day visitors and passing trade. Each of the villages gains a different level of benefit depending on the volume of these visitor markets and the extent and nature of their engagement with them.

Aberfoyle has a large stock of accommodation and, while occupancy is reported to be low, it continues to attract tourists and day visitors. Drymen and Balmaha like Aberfoyle is a destination. It attracts both staying visitors and day visitors. However, the day visitor volume is substantial and exceeds the staying visitor market. The presence of the David Marshall Lodge Visitor Attraction with the Go Ape development and the Queen Elizabeth Forest Park provides Aberfoyle with visitor assets that will allow it to develop the staying visitor and day visitor markets. However, both markets would benefit from improved access to information on activities in and around Aberfoyle. This is particularly the case if the staying visitor market is to be developed. The other constraint on the staying visitor market is the availability of suitable accommodation. The family and friends markets are demanding good quality self-catering accommodation with access to restaurants. This is a shift away from the serviced accommodation in hotels and guest houses that currently exists in Aberfoyle.

Tyndrum and Arrochar are different to Aberfoyle and Drymen as they are locations where a majority of visitors pass through. This does not discount the existing businesses that attract staying visitors but notes that they are small scale in relation to the passing trade and potential day visitor market. While Tyndrum extracts some economic benefit from the passing trade through the provision of services, Arrochar benefits little. While they both have hotels the scale of the passing trade is much greater than the staying visitor market. Tyndrum has developed the Green Welly and the Real Food café in response to the needs of travelers.

Arrochar has not been able to develop the same relationship with the passing trade. In part this is related to the locational advantages and disadvantages of each village. Arrochar is close to Glasgow and passing trade will extend their journey to Loch Fyne, Inverary, or beyond before taking a break, thus avoiding stopping in Arrochar or Tarbet. Tyndrum traffic may have set out from Glasgow or Edinburgh and be travelling to Oban or Fort William and are more likely to use Tyndrum as a convenient point at which to break the journey.

7.2 Visitor Product Development Strategies

Each of the Charrette villages or group of villages faces a different mix of needs and opportunities. Arrochar and Tyndrum have the prospect of private sector led development in the form of the resort complex and gold mine respectively. These have provided a catalyst for the local community. While it is hoped that these developments both take place in the short term the proposed strategies are not dependent on them. The proposed development strategies can be implemented either in advance or in the absence of the resort or gold mine.

Drymen and Balmaha's visitor strategy is essentially addressing the issue of dealing with success, high visitor volumes, and maintaining a quality visitor experience.

While the visitor strategies for Arrochar, Tarbet, Succoth, Tyndrum and Drymen and Balmaha are predominantly about addressing the day visitor market, Aberfoyle provides a significant opportunity to address the staying visitor market. The location, the access to the outdoors, and the local infrastructure will allow Aberfoyle to develop as a short break destination. The presence of the David Marshall Lodge Visitor Centre, the Queen Elizabeth Forest Park, and Go Ape provides a considerable amount of the infrastructure to attract the short break market.

7.3 Strategic Development Proposals

The proposals for each village or group of villages are summarised below.

7.3.1 Aberfoyle Visitor Development Strategy

Vision: Destination for those who love the outdoors

Visitor Markets: Short Break and Day Visitors

Visitor Market Segments: Affluent Active Devotees; Younger domestic explorers; Mature Devotees; and, Better Off Traditionalists.

Priority developments: Promotion of Queen Elizabeth Forest Park for outdoor activities including the provision of multi-day itineraries to encourage short break visitor market;
Introduction of additional self-catering provision for short break visitor market;
Introduction of additional high quality serviced visitor accommodation, e.g. hotels and guest houses
Improved village centre to encourage visitors to browse;

7.3.2 Drymen and Balmaha Visitor Management Strategy

Vision: Eastern Gateway to Loch Lomond

Visitor Markets: Predominately Day Visitors

Priority developments: Drymen Square enhancements;
Enhanced visitor information and orientation;
Management of day visitor volume with alternative means of access to Balmaha;
Improved parking and traffic management;
Improved footpath network linking Drymen to Loch Lomond;
Introduction of camping grounds close to Drymen;
Provision of public toilets.

7.3.3 Arrochar, Succoth and Tarbet Visitor Development Strategy

Vision: Destination for Adventure Seekers

Visitor Markets: Day Visitors Leading to Development of Short Break Market

Priority developments: Village squares to provide a sense of place and sense of arrival;
Village centre car parking to enable visitors to use local services and facilities;
Pier / Pontoon development to promote water access in Arrochar and link to proposed Ben Arthur resort development;
Feasibility study for a Heritage Centre and Community Café;
Public toilets;
Enhanced path network including link to Ben Arthur resort

7.3.4 Tyndrum Visitor Development Strategy

Vision: Mining Heritage – Prospectors Welcome

Visitor Markets: Day Visitor Destination

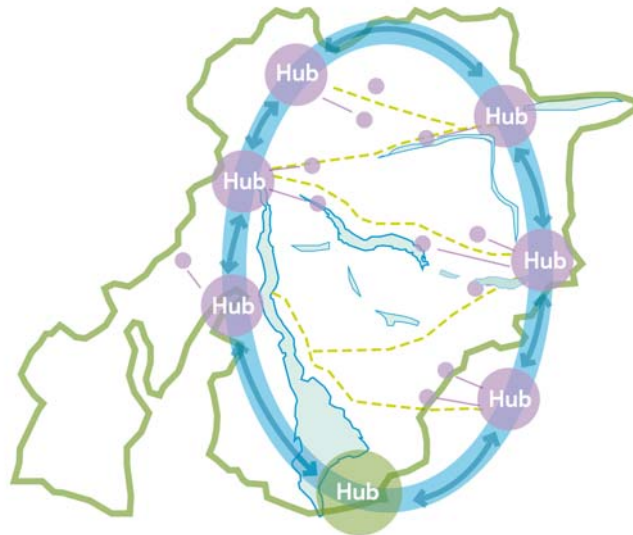
Priority developments: Feasibility study for a Mining Heritage attraction;
Improved pedestrian linkages in Tyndrum

7.4 Implications for the Wider Park

At present the National Park comprises a destination for visitors but for as many as one-third of visitors it is merely an area that they pass through on the way to somewhere else. This pattern of use is reflected in both Tyndrum and Arrochar, Tarbet and Succoth with differing results. Tyndrum has engaged appropriately with the passing trade maximising its locational advantages whereas Arrochar, Tarbet and Succoth have not been able to develop or sustain such a beneficial relationship with its passing trade.

At the level of the individual settlements we have identified the need to provide more information for visitors to provide orientation, itineraries, details of where and how to access services based on their chosen destination. In addition, there is a similar opportunity to provide both visitors and potential visitors with additional information about the National Park as a whole and reinforce the Park's identity as a place to engage with the outdoors. This should explain the choices that visitors have in terms of experiences and how these can be met from alternative locations within the Park and present the opportunities to link multiple locations using water and land based transport options.

There is a further opportunity to reinforce the hubs and the links between them by providing special visitor experiences that are unique to the Park and its landscape, such as key viewpoints and local landmarks. These have the potential to make the experience of moving around the Park as enjoyable as reaching the chosen destination. Critically this approach would help consolidate the extent of and variety in the Park in the minds of potential visitors and reinforce its identity.



The small scales of Arrochar, Tarbet and Succoth and Tyndrum means that the aspirations to become destinations need to be tempered with the knowledge that the capacity to service visitors will be finite. At present these villages and settlements do not have all of the features of a fully functioning destination and, even if they did, the capacity to service visitors would be finite.

Therefore, in both the short and the long-term these villages and settlements will have to view themselves as part of a destination and link to other settlements in the Park to provide the full range of visitor destination services.

Drymen and Balmaha and Aberfoyle have more of the features of a destination. However, Drymen and Balmaha have significant issues in relation to the peak volume of day visitor activity that can overwhelm the existing transport infrastructure. Aberfoyle has many of the features of a destination but these are a legacy of a more prosperous past and it needs to be revived.

The Long Distance Walks deserve a special mention as they provide a key means by which visitors access and link areas of the Park. The West Highland Way is the most recognisable of these and walkers who complete this route may use a wide range of tourism services including transport, shops, bars and restaurants, accommodation, toilets and baggage transfer services. The Long Distance Walkers' experiences, as with many visitor experiences, comprise a series of engagements and encounters and an enjoyable experience requires each service provider to deliver a quality visitor experience.

Another feature of the Long Distance Walk, using the West Highland Way as an example, is the nature of demand on those who provide visitor services to walkers and the fact that accommodation and other service providers in the different locations along the route are in a co-dependent relationship. For accommodation and other service providers in Tyndrum to benefit from a demand from walkers those walkers need to be able to secure accommodation in Drymen, Balmaha, Rowardennan, Inverarnan, and Crianlarich. Any capacity constraints in these locations will ripple along the route resulting in missed opportunities in terms of fewer walkers. Such capacity constraints could occur if accommodation providers decided to prioritise visitors who wish to stay for more than one night, or decided to introduce premium pricing taking accommodation away from the traditional walkers market. The importance of the walkers market needs to be recognised and accommodation service providers encouraged to value this market.

7.5 Conclusions

There is considerable energy and community infrastructure in both Tyndrum and Arrochar, Tarbet and Succoth to advance and deliver these proposals with assistance from the key agencies. Drymen and Balmaha are similarly well served with the Drymen Community Development Trust Enterprise Company. While Aberfoyle has the most significant staying visitor development opportunities, the realisation of these will require an increased capacity within the local community development organisations to progress them. Additional support from the local and national economic and tourism development agencies is likely to be required.

APPENDIX A

CHARRETTE FULL PROGRAMME

Charrette Full Programme - For Charrette and Project Teams



Event	Day	Time	Session	Where
Charrette Launch	Monday 4th Feb	2 - 5pm	Presentations and Q&A	Balloch
Fact-Finding Charrettes	Friday 8th March	12.55 - 1.45pm	School Session - McLaren High School	Callander
		3 - 4pm	Community stakeholder group discussion	Aberfoyle
		4 - 5pm	Young family drop-in	
		5.30 - 8.30pm	Public Workshop	
	Saturday 9th March	1.30 - 2.30pm	Community stakeholder group discussion	Drymen
		2.30 - 3.30pm	Young family drop-in	
		4 - 7pm	Public Workshop	
	Sunday 10th March	12 - 1pm	Community stakeholder group discussion	Arrochar
		1 - 2pm	Young family drop-in	
		3 - 6pm	Public Workshop	
	Monday 11th March	10 - 10.50am	Hermitage Academy	Helensburgh
		1 - 2pm	Crianlarich Primary School	Crianlarich
		3 - 4pm	Community stakeholder group discussion	Tyndrum
		4 - 5pm	Young family drop-in	
5.30 - 8.30pm		Public Workshop		
Agency/Partner Stakeholder Day	Friday 15th March	10 - 4pm	Programme to be expanded	Balloch
Feedback Charrettes	Saturday 23rd March	1 - 2pm	Young family drop-in	Tyndrum
		3 - 5.30pm	Public Workshop	
	Sunday 24th March	12 - 1pm	Community stakeholder group discussion	Aberfoyle
		1 - 2pm	Young family drop-in	
		3 - 5.30pm	Public Workshop	
	Monday 25th March	10.30 - 11.30am	Balfron High School	Drymen
		4 - 5pm	Young family drop-in	
		5.30 - 8pm	Public Workshop	
Tuesday 26th March	4 - 5pm	Young family drop-in	Arrochar	
	5 - 7pm	Public Workshop		
Exhibition of Outcomes	Saturday 27th April	12 - 2pm	Aberfoyle Drop-In Exhibition	Aberfoyle
		4 - 6pm	Drymen & Balmaha Drop-In Exhibition	Drymen
	Sunday 28th April	12 - 2pm	Tyndrum Drop-In Exhibition	Tyndrum
		4 - 6pm	Arrochar & Tarbet Exhibition	Arrochar



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