

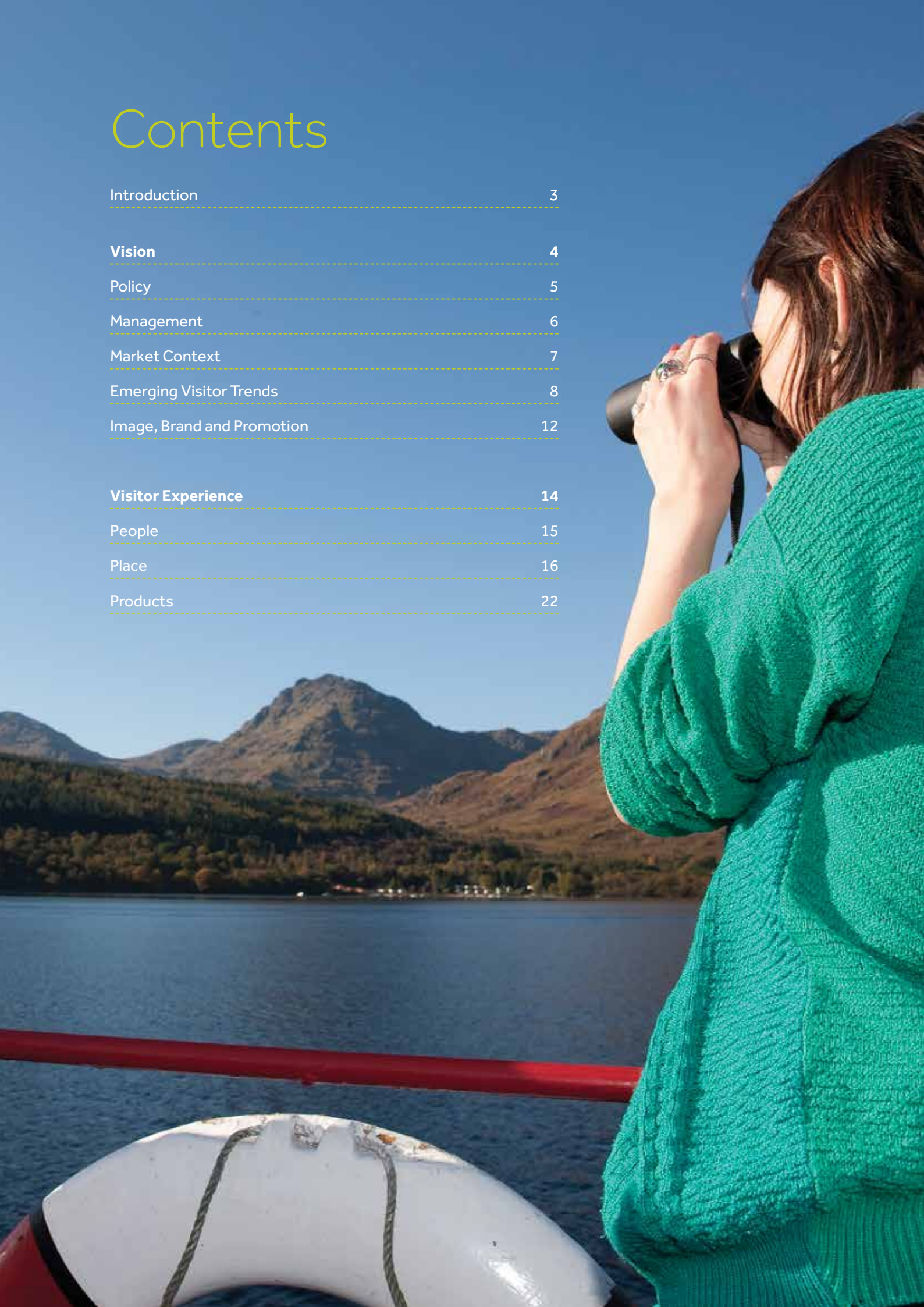
TOURISM STRATEGY

2012 - 2017



Contents

Introduction	3
Vision	4
Policy	5
Management	6
Market Context	7
Emerging Visitor Trends	8
Image, Brand and Promotion	12
Visitor Experience	14
People	15
Place	16
Products	22



Introduction

Tourism is the largest industry in the Park and, as such, it is vital that landowners, land managers and public agencies understand the opportunities and challenges that exist for tourism businesses.



This strategy provides the tourism context of the National Park Partnership Plan, setting out a clear and long term ambition for growth. Underpinned by well defined public agency led actions and private sector development opportunities, the Tourism Strategy seeks to deliver substantial economic return both within the National Park and at a national level.



List of table abbreviations:

BS	Business Sector
CDT	Community Development Trust
CP	Community Partnership
FC	Forestry Commission Scotland
FOLL	Friends of Loch Lomond & The Trossachs
FOWHL	Friends of the West Highland Lines
LAs	Local Authorities
LDG	Local Destination Group
NPA	National Park Authority

NPDG	National Park Destination Group
PS	Police Scotland
SDI	Scottish Development International
SE	Scottish Enterprise
SG	Scottish Government
STC	Stirling Council
TS	Transport Scotland
VS	VisitScotland
WDC	West Dunbartonshire Council
WTS	Woodland Trust Scotland

Timescales for actions:

Short-term	2012 – 2014
Medium-term	2014 – 2016
Long-term	2016 – 2017

Our Vision

To deliver 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.

National Parks are globally recognised tourism assets, National Park status has given Loch Lomond & The Trossachs National Park the opportunity to add to Scotland's tourism offer.

Tourism provides the major source of income and employment to the National Park and is vital for the economy of the Park and of Scotland.

Our strategic aims

- To be a sustainable destination responsive to changing customer expectations
- To address the development of infrastructure and tourism facilities to 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 through destination brand

Policy Context

This strategy takes advantage of the favourable national policy environment where there is an ever growing recognition of the value of both tourism and Scotland's natural environment



The creation of Loch Lomond & The Trossachs National Park in 2002 was an acknowledgement that the area is one of Scotland's national assets that requires a sustainable approach to visitor management, balancing the needs of visitors, communities and conservation to deliver a high quality destination, based on enjoyment of the natural and cultural heritage.

We must have a clear view of where we wish to be positioned strategically over the decade ahead and to ensure that the Park offers and promotes a unique and compelling visitor experience which matches the expectations of our future global visitor markets. We also must also have a clear view of the visitor management required to ensure that we safeguard the special qualities of the Park.

The development of this strategy provides a future-focused framework for maximising the potential of tourism in the Park and enabling stakeholders to understand our purpose and direction. It gives a clear view.

- identifying the areas where development is needed
- directing resources to areas of most impact
- enabling the National Park Authority and partners to work to agreed goals
- safeguarding the Park's natural heritage, cultural heritage, land and water resources through sustainable development
- reducing the risk of being diverted from our task

The National Park Plan 2012-2017 and the National Park Local Plan provide the drive and direction for the National Park Tourism strategy. It is the expression of the tourism policies and strategic planning with partners in creating these plans, combined with the tourism focus provided by national tourism policies and research.

The Strategy

- sets a framework for businesses in the Park to help deliver Tourism Scotland 2020, the National Tourism Strategy for Scotland. The National Strategy aims to grow overnight visitor spend for Scotland of between £5.5bn and £6.5bn by 2020, generating sustainable economic growth by meeting and exceeding visitor expectations for quality and authentic experiences. The Park has an important role to play in delivering the national strategy by targeting our growth markets and providing authentic experiences around nature, heritage and activities, events and festivals and business tourism.
- aligns with Scottish Enterprise's tourism strategy which focuses on opportunities which exist around the tourism assets that offer the strongest basis for international competitiveness and growth. It has identified Loch Lomond & The Trossachs National Park as one of the six key destinations within the Scottish Enterprise area which have greatest opportunity to contribute to national growth.
- shares the aim with SNH strategy of "Enjoying the Outdoors" to increase participation in countryside recreation and with Forestry Commission Scotland's strategic objective of recreation, community and environmental benefits.
- connects to economic development and tourism strategies of local authorities overlapping the National Park.

If we want the visitor economy to realise its full potential, to make a step change in the value of tourism to the National Park and Scottish economy, and not just do a bit more of the same, significant strategic interventions will be required.

Management

The National Park's tourism strategy articulates the ambition for the destination. The tourism businesses in the Park have played a leading role in developing the area.

The tourism strategy sets the National Park's priorities for a framework that will allow businesses to develop market focused business opportunities to make a step change in the value that tourism can deliver for the area.

The direction of the strategy has been driven by a cross Park association of businesses, the National Park Destination Development Group providing an overview of opportunities, challenges and focus. This partnership at a National Park destination level has been supplemented at sub destination level by input from local area business groups, Breadalbane Co-op, Callander Enterprise, Cowal Marketing Group and Love Loch Lomond. The aim is to grow industry leadership and collaboration to share best practice; improve the overall visitor experience and deliver on local and national priorities.



Integrated management of Loch Lomond & The Trossachs National Park is important to long term success. Planning, development, operations, branding and marketing has to be managed for the destination as well as for the individual attractors, services and infrastructure elements. The National Park has a responsibility for rural development, conservation and visitor experience giving it a central role in sustainable tourism development. The

Park's role is pivotal to create the infrastructure, transport and environment for the private sector to deliver tourism growth.

The tourism strategy will be delivered through a series of actions to be reviewed and refined over time. An annual conference will take place with stakeholders and business groups to share progress, review and take account of external changes. Research will be carried out to benchmark our National Park and measure progress against targets.

PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
1	Support business led National Park Destination Group development	NPA, NPDG	VS, SE, BS, LDG	SHORT
2	Support development of area and sector marketing groups to encourage business led promotions	VS, BS	NPA, SE, NPDG	SHORT
3	Hold annual industry conference to share progress and review future actions	NPA, NPDG	VS, SE, BS, LDG	SHORT

Market Context

Tourism is the fastest-growing global economic sector both in terms of foreign exchange earnings and job creation.

Whilst specific world events have resulted in temporary shifts in travel patterns, they have not resulted in less travel, as world tourism consistently continues to grow by 4% per year.

There is a long history of welcoming visitors to the National Park area, with the first tourists arriving as early as the 1700s. The advent of railway and steamer travel in the nineteenth century opened up the area to visitors and it became a major holiday destination during Victorian times. With the 1920s industrialisation of Glasgow, the Park region became a day and weekend break destination for the city, and as recreation grew, became known for water based activities such as boating, water skiing and fishing as well as accessible hill walking.

In 2002 the area was designated a National Park in recognition of the fact that as a special area close to a large centre of population it required dedicated management to manage the balance of visitor use with conservation of the special qualities and provision of the facilities needed.

The National Park attracts 4 million visitors and almost 7 million visitor days a year,

providing employment for 2,400 people in tourism and recreational activities, accounting for a third of all jobs in the area and supporting around 400 accommodation providers^[1]. Loch Lomond and the Trossachs is primarily a leisure destination although there is a significant business tourism market with weddings a major component. 60% of the leisure market are day visitors, mainly from Central Scotland, and 40% are overnight visitors, staying on average 4.4 nights in the Park. National Park status has a significant influence on visits, being an important factor for 46% of visitors^[2].

Around 60% of our visitors are from Scotland, groups of families and friends on a day visit.

Visitors come to the Park predominantly in groups of adults, average number of adults within any group is three, or if families, an average of two children per group.

Overnight visitors are predominantly from the rest of the UK and overseas. 19% of visitors are from the UK and 17% are from overseas. 60% of our visitors have visited before (mainly day trip market) and 40% are on a first time visit^[2].



Our scenery, the lochs and mountains, are key motivations for visiting the National Park. The Park is a place where people enjoy the beauty of the area. Our visitor research tells us:

- Sightseeing is the main activity followed by walking.
- A significant proportion of visitors come for active sport.
- Eating out and cultural heritage are areas which require development to become greater attractors for visitors.

First time visitors are likely to be from England or from overseas where the majority will be making their first visit to the Park as part of a longer visit to Scotland. As first time visitors they will require more introduction, orientation and guidance than our regular visitors to ensure they get the best from their trip.

[1] United Nations World Trade Organisation
[2] Valuing the Park Study 2011

Emerging visitor trends

Some of the trends which should be considered in strategic planning include:



Economic uncertainty

Consumers are looking for safety and value for money, – staycations are on the increase – may be more opportunity to attract Scottish and UK visitors.

Focus on the value equation

The importance of value to the consumer – value is not just about price, but quality of product and service in relation to price. Highlighting all of the National Park's beautiful natural attractions, richness of product, unique amenities and exemplary service, rather than just the price of a hotel room, can help businesses demonstrate the Park's excellent value.

Population dynamics

UK population is becoming older. Empty nesters of the baby boom era have been brought up to travel and will be reluctant to give this up, but have more limited discretionary spending power. Changing social structure means holidays are time for extended families and friends to be together.

Growing expectations

There are growing expectations of quality of service and experience and personalisation of service. Unique authentic experiences are important to visitors.

Greater value placed on environment and heritage

There is greater awareness of the impact of travel and tourism development on the environment – this is positive for the National Park.

Competitive destinations

There is increasing competition in the UK and overseas between local destinations – the National Park cannot be complacent.

Networked society

Social media and mobile technology becoming central to travel decision making – the influence of consumers on marketing is growing through social media channels. VisitScotland visitor survey in 2011 found that half of visitors to Scotland shared their experiences online after they returned home. Around 1 in 10 left reviews on a travel website. To deliver positive impactful feedback and images requires that visitors have positive memorable experiences so amazing they have to share them – average doesn't do it.

SWOT Analysis for tourism in the National Park

Strengths

- National Park designation
- Accessible to major centres of population
- Magnificent landscapes
- Range of outdoor activities
- Paths network
- Signage strategy

Weaknesses

- Visitor infrastructure
- Lack of public transport around the Park
- Low level of new products and services
- Lack of packaging of experiences
- Under developed cultural offer
- Fragility of heritage attractions

Opportunities

- Developing awareness of National Park offer
- Brand development
- Growing interest in environment/wildlife
- Increase activity offer for visitors
- Event development
- ICT applications
- Employment rich sector
- Grow food and drink offer
- Water transport and long distance walking and cycling routes

Threats

- Inability to match competitor investment
- Overuse through accessibility
- Quality of visitor experience does not live up to brand promise
- Quality of infrastructure
- Lack of skilled labour

Visitor Profile

VisitScotland has profiled six market segments, (see opposite) which it considers provide the best return on investment for Scotland's tourism industry.

VisitScotland has identified that the National Park attracts predominantly two of those six market segments:

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

■ **Affluent Active Devotees** - are typically 50 plus, have high disposable income, enjoy good food and drink, active pursuits and like to stay in boutique hotels.

41% of visitors are 55 or older, less than 30% are families with children.

Our visitor experience should aim to continue to cater for existing markets but strategically we should consider additional facilities and experiences that will broaden the offer for Affluent Active Devotees and meet the need of other market segments

that can be attracted for overnight stays including young domestic explorers, a market with potential to develop long term affinity to the Park, affluent southern explorers and better off traditionalists.

Leisure models now segment leisure markets considering the whole visitor experience and not just visitor attractions and accommodation. There is opportunity for targeting particular market segments by providing a range of experiences to meet their consumer behaviour.

With seven million visitor days annually in the National Park it is not necessarily about attracting greater numbers but about providing experiences with a range of differentiated offers that appeal to target market segments and encourage greater spend and more overnight stays.

Achieving greater spend also means influencing visitors who currently pass through the Park without stopping and regular day trippers, with a range of



experiences to increase the propensity to spend further time and money in the destination. For this to be the case requires that all facilities are of good quality and that food and drink and all points of the visitor experience match that of the scenery.

To do this requires:

- a combination of improved infrastructure
- a range of accommodation development
- development of visitor experiences to appeal to market segments
- positioning of the Park to attract target markets and promotion of the destination.

PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
4	Regular Visitor Survey to monitor visitor profile and experience	NPA	SE, VS, BS	SHORT
5	Benchmark with best practice destinations	NPA	SE, VS	SHORT
6	Research perceptions of places and activities in the Park with potential visitors	NPA	VS	SHORT
7	Barometer of tourism industry to understand trends and quantify private sector investment	NPDG	BS, LDG	MEDIUM

WARM SEGMENTS

Affluent Southern Explorers (W1s)

Midlands and Southern UK
(36% London)

Profile

- Most affluent segment
- Wide age range (average age 45)
- Professionals
- Confident / discerning
- High achievers
- Midlands and South UK (36% London)

Lifestyle

- Not materialistic
- Time / freedom for self
- Authentic experiences
- Broaden minds
- Build knowledge
- Environmental / green

Holiday motivations

- Travel important to lives
- UK and abroad
- Take longer breaks
- Explore local culture
- New and familiar
- Get off beaten track

Relationship to Scotland

- Warm - currently take holidays and short breaks in Scotland
- Geographically distant but strong connection

Interests/activities

- Walking
- Wildlife, nature
- Culture, golf, good food and drink
- Local events and festivals

Younger Domestic Explorers (W2s)

UK wide

Profile

- Youngest warm segment
- Average age 42
- 1/3 of households have children
- UK wide
- Above average income

Lifestyle

- Work to live
- Limited disposable income
- Busy lives
- Like to discover and explore
- More likely to consider environmental / green travel options

Holiday motivations

- Escape from routine
- Relax and explore
- Love UK breaks
- Masses to see and do
- Convenience
- Good value for money

Relationship to Scotland

- Warm - currently take holidays and short breaks in Scotland
- Beautiful / stunning
- Discovery / diversity
- Freedom to explore
- Easy to get to

Interests/activities

- Sightseeing and exploring
- Castles, culture, wildlife, events
- Festivals, music
- Active sports and family attractions

Mature Devotees (W3s)

Scotland, Northern England and Northern Ireland

Profile

- Oldest segment/ retired
- Average age 53 (but over half 55+)
- Lower than average income
- Scotland/ Northern England (Lancashire, Yorkshire)/ Northern Ireland

Lifestyle

- Like the familiar
- Risk averse
- Traditional values
- Time rich/ cash poor
- Buy and think local (newspapers, radio etc)

Holiday motivations

- UK orientated
- Scotland their favourite
- Know it very well
- Longer breaks/ touring
- Revisit special places
- Seek out offers/ deals
- Love planning

Relationship to Scotland

- Warm - currently take holidays and short breaks in Scotland
- Loyal ambassadors (highest nights in Scotland)
- Come every year
- Love it like an old, dear friend

Interests/activities

- Sightseeing, historical sights, museums, castle and gardens
- Good food/ local produce/ farmers' markets

Affluent Active Devotees (W4s)

Scotland, Northern England and Northern Ireland

Profile

- Above average income
- Average age 50
- Professionals
- Confident/ discerning
- Scotland/ Northern England/ Northern Ireland

Lifestyle

- Busy lives
- Like discovering new things
- Like the finer things in life
- Like new challenges and being active

Holiday motivations

- Well travelled
- UK and abroad
- Escape and relaxation
- Experience seekers
- Try new destinations
- Like to be culturally and physically 'active'

Relationship to Scotland

- Warm - currently take holidays and short breaks in Scotland
- Believe Scotland is best part of UK for holiday but most likely of warm segments to spend nights abroad

Interests/activities

- Explore beautiful landscapes
- Hiking, cycling, golf
- Good food and drink
- Spend quality time with partner/ family

COLD SEGMENTS

Better Off Traditionalists (C3s)

Mid / South UK (34% London) inc. Wales and South West

Profile

- Above average income
- Average age 51
- Live in Mid / South UK (34% London) includes Wales and South West
- Unlikely to have children at home

Lifestyle

- Traditional values
- Unlikely to take risks
- Knowledgeable / well educated
- Like news / current affairs
- High daily newspaper readership

Holiday motivations

- Interested in travel and culture and quite adventurous
- Prefer abroad but recent interest in UK staycation
- UK holidays - strong cultural element

Relationship to Scotland

- Cold - do not currently take holidays and short breaks in Scotland
- Lapsed visitors
- Believe Scotland is difficult to get to
- Scotland not the best part of the UK for holidays

Interests/activities

- Sightseeing, historic castles, museums, national parks
- Also hiking for those more active

Northern Sometimeers (C5s)

Scotland, Northern England and Northern Ireland

Profile

- Average age 44
- Average income
- Jobs not careers
- Northern England, Scotland and North Ireland
- 1/5 of this segment live in Scotland

Lifestyle

- Family is important
- Less active and curious
- Enjoy populist culture
- Sedentary
- Habitual in behaviour

Holiday motivations

- Prefer abroad (sun, sand and sea destinations)
- Want to relax and do 'nothing'
- UK = city breaks
- UK = poor value for money

Relationship to Scotland

- Cold (but warmest cold segment) - do take some breaks to Scotland but prefer abroad
- Open to ideas on good value city breaks with relaxation and fun focus

Interests/activities

- Cities, shopping, theme parks, theatre
- Christmas markets
- Social breaks with friends and family

Image, Brand & Promotion

The destination's **BRAND** captures all elements of the destination experience and presents it to its markets. A successful destination brand articulates ambition, raises expectations, makes a promise of quality – and keeps it.



ATTRACTORS - create awareness of the National Park and attract market interest. Attractors include natural features, retail, leisure and cultural experiences, and events.

INFRASTRUCTURE - helps create a sense of place and supports the smooth operation of the Park. It includes transport, parking, signage, toilets, piers, etc.

SERVICES - cater to visitors' and residents' needs, help create activity and, ultimately, increase spending. They include accommodation, cafés, bars, shops, event programmes, rangers, including volunteer rangers and services such as cleaning, security and customer care.

The National Park brand was developed in 2010 to to provide a strong identity for the Park. It represents quality and environmental sustainability and will feature prominently on entry point signage and visitor interpretation across the Park. It represents Loch Lomond & The Trossachs National Park as a destination and one of the family of national parks around the world, a place where visitors will expect a sustainable approach to visitor management, balancing the needs of visitors, communities and conservation to deliver a high quality destination.

The Park brand supports the national brand Live it, VisitScotland, which is built around attributes people associate with Scotland – the brand essence: enduring, dramatic and human – and is captured in the proposition that a visit to Scotland is such a unique, powerful and personal experience

that it can touch all the senses. The National Park brand echoes this proposition.

There is a need to further develop the Loch Lomond & The Trossachs National Park brand proposition to offer compelling messages which can be central to VisitScotland's promotion of Scotland, making the most of the tourism asset of the National Park in promotions for UK and overseas markets.

Positioning the National Park consistently and all partners and businesses using the destination brand is critical to driving differentiation of the destination and raising its profile.

There is currently a wide range of online and printed marketing materials ranging from commercial websites and leaflets for attractions to sub destination websites. Quality and effectiveness of these activities varies greatly and there is a lack

of consistency and co-ordinated approach in the marketing messages about the destination.

There are many destinations competing to offer reasons to visit, it is essential that the National Park has clear, focused, compelling and consistent propositions. The Park's brand pillars should set the tone for how visitors feel when they are here - safe, energised, feeling good about the world and having powerful and personal experiences that can touch all the senses.

**LOCH
LOMOND
& THE TROSSACHS
NATIONAL PARK**



Promotion

The National Park has been identified by Scottish Enterprise as one of the six key destinations with economic growth potential and an international brand. The National Park should be the jewel of VisitScotland's promotion activities. With private sector leadership, the National Park Authority must work closely with partners and VisitScotland to provide VisitScotland with propositions to sell the destination and help sell Scotland.



PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
8	Use potential of National Park brand to add value to local businesses. Grow Business in the Park initiative	NPA, NPDG	VS, SE	SHORT
9	Develop cross-Park private sector collaboration to develop and promote the National Park as a destination	NPDG	NPA, VS, SE, BS	MEDIUM
10	Coordinate joined up presence and promotion by business groups under destination brand to travel trade where appropriate	BS, NPA	VS	MEDIUM
11	Work towards a private sector led marketing strategy and marketing plan for the destination focused on growth markets and supported by all partners	NPDG	VS, SE, BS, NPA	MEDIUM
12	Support collaboration between business groups and agencies to take advantage of marketing opportunities	VS, BS, SE	NPA	MEDIUM
13	Collaboration with VisitScotland to work towards consistent and compelling destination propositions for international and UK markets	NPA	VS, NPDG	MEDIUM



Visitor Experience

The National Park is a special place with strong and enduring appeal which should be a place that people aspire to visit

Our strength is our scenery which is world class and known throughout the world through images of romantic Scottish landscapes.

Our landscape is what attracts people. Once here they experience outdoor adventure, heritage and culture, food & drink and events, and to do this

they need accommodation and facilities both in countryside and in villages and towns.

To gain most value from our visitors and attract visitors in the future presents a challenge to provide a tourism infrastructure and product which matches up to the quality and appeal of the region's natural assets.

“There is a need to create a sense of place, providing quality infrastructure and spread the benefits across the Park.”

People

There are some outstanding tourism businesses in the National Park, including award-winning bed and breakfasts and cruise operators, and pub and hotels of the year, but like the rest of Scotland the visitor experience can be variable.

For the tourism offer to meet the expectations of evermore discerning visitors consistently and professionally there is need to continuously raise standards across the board. Addressing some of the particular challenges for the industry in the National Park requires developing a local response to meet local business needs.

A particular challenge, like the rest of rural Scotland, is the disparate nature of the business base, with national brands co-existing with a large number of micro businesses, especially in the accommodation sector. The latter are central to the distinctiveness and authenticity of the visitor experience. However, for small, usually family-owned businesses, it may be a challenge to find the time and money to invest in raising service standards and continued innovation in visitor experiences.



For businesses within the National Park to grow in an increasingly competitive tourism marketplace, requires a visitor-led, innovative approach to ensure the service offered in the National Park meets the qualities of the landscape and the visitor experience reflects the special and distinct qualities of the Park.

The aim is for visitors to experience a level of service which reflects the destination whether they are being greeted by an

accommodation provider, a ranger or anyone else they meet in a tourism related business and that tourism staff are able to provide information about the destination which will enhance a visitor's experience.

Feedback from businesses in the National Park has identified training needs around customer service, knowledge of the special qualities of the Park and social media.

PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
14	Develop and implement Loch Lomond & The Trossachs National Park Service Initiative in response to business needs	NPA, SE	VS, NPDG	SHORT
15	Provide comprehensive visitor welcome through Ranger and Volunteer Ranger Service	NPA		SHORT
16	Develop opportunities for volunteer rangers to support tourism business offers	NPA	NPDG	MEDIUM
17	Support Community Partnership to develop tourism/hospitality apprentice scheme	CP	NPDG, NPA	SHORT

Place

The National Park is Scotland's playground; its accessibility brings huge challenges. The National Park's natural assets (biodiversity, water, landscapes) and communities in certain locations are under immense pressure due to high levels of recreation and visitor pressure.

Over the years there has not been enough investment in the underlying visitor infrastructure in the National Park to cope with the visitor pressure. There is a lack of value attached to maintaining existing infrastructure and assets to a high standard to support tourism. There is a lack of quality and provision of infrastructure that would suggest to visitors they are in a National Park. Not glamorous stuff, but vital for attracting visitors who will be comparing us with other National Parks and destinations around the world. In peak holiday weekends, overcrowding can lead to particular issues. A lack of respect amongst a minority of visitors causes issues of litter, vandalism and anti-social behaviour which impacts negatively on other visitors' experience and sustainability.



The National Park Authority has a unique position in Scotland taking the lead in developing a holistic approach to conservation and development, providing protection where required and identifying zones where tourism development can be encouraged to take advantage of the natural assets in the Park, to promote economic growth and to provide employment and income for those living and working in the area.

Callander is the largest settlement in the National Park and is a long established tourist destination. It currently lacks the provision of facilities and

services for outdoor activities that would cater for both locals and visitors. Developing Callander as a centre to offer services to the family soft adventure market has been identified as an objective by the local community. This requires routes to encourage a critical mass of businesses offering services and products in support of outdoor activities and all year round events. There is an opportunity for Callander to reinvigorate itself to provide new services to appeal to the visitor market and create a townscape which befits its ambition to be adventure capital of the National Park.





Balloch is the largest gateway to the National Park. Lomond Shores has been developed as the gateway hub and attracts up to 8000 visitors every weekend. It has excellent car parking and should be one of the natural places for an introduction to the Park and the visitor offer should reflect this. Public realm improvements to Balloch and improved tourist facilities will help attract private sector investment to the town. There is an opportunity with the long distance walking and cycling routes around Balloch for it to be a hub for walking and cycling.

In the main hubs and in areas identified as appropriate for development there is opportunity to encourage the private sector to address gaps in accommodation and hospitality offer to better meet market expectations and increase visitor spend. The continued importance of high quality public realm design in the main tourist centres is recognised. New public realm developments, where relevant, should reflect the Park's heritage.

Around the Park there is a myriad of confusing signage and interpretation from private, voluntary and public sectors which erodes the scenic qualities and confuses the customer rather than enhancing a visitor's experience. There is a need to create a sense of place and a consistency of message to give visitors the best experience and understanding of the landscape that has attracted them. Signage and interpretation around the Park should be impactful and be used sparingly and consistently. An information signage strategy for the destination should be developed.



There is great potential to enhance the experience of the landscape by improving scenic routes and providing viewpoints which let visitors connect to the landscape. Scotland has some world renowned scenic routes. We should capitalise on them and provide architecturally inspiring viewpoints that reflect the quality of the landscapes and use our roads more productively as part of our tourism product. The National Park is a natural pilot project for development of a Scottish scenic routes viewpoints programme.



Planning Environment



Tourism has a huge potential for economic growth in the Park. The National Park Authority has a critical role as a catalyst for well planned, significant, authentic tourism projects by being open for tourism and giving a clear steer to the private sector through

the Local Plan identifying and promoting sites for development and by fostering relationships with private and public sector partners to encourage private investment based on the natural qualities of the area

We need to develop the tourism product to meet the needs and expectations of visitors and the community whilst conserving and enhancing the environment on which tourism depends. Investment priorities must match and respond to consumer demands and so must be evidence based. Public infrastructure investment

must create the conditions for private enterprise to prosper and businesses must plan for productivity improvement over the medium and long term.

At the same time, we must make the best of our natural and built landscapes in the Park and ensure that development is of the highest standard, embracing top quality design and building materials which are sympathetic to the best of what has gone before. We must aim for thriving hubs providing quality facilities and services for visitors in our towns and villages.

PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
18	Improve information and signage for visitors. Develop and implement information and interpretive signage design strategy.	NPA	NPDG, SE, VS TS, FC FOLL, LAS	SHORT/MEDIUM
19	Work with partner agencies to agree plan for co-branding and reducing signage clutter.	NPA	NPDG, SG, VS, LAS	SHORT
20	Work with VisitScotland and others to ensure joined up approach to visitor information centre provision throughout the Park.	NPA	FC, VS	SHORT
21	Develop a pilot in the National Park for a Scottish programme of architecturally inspired viewpoint stops which enhance the experience of the stunning landscape.	NPA	SC, VS, TS NPDG	MEDIUM
22	Invest in visitor facilities, toilets, campgrounds, parking and develop innovative solutions for long term sustainability.	NPA	NPDG, VS	SHORT/MEDIUM
23	Management of visitor pressure locations through a range of appropriate measures.	NPA	PS, LAS	SHORT
24	Identify and promote private investment and business opportunities arising from public infrastructure investments.	NPA	NPDG, SDI, SE	MEDIUM
25	Support development of Callander as hub for outdoor adventure in the Park.	CP	NPA, BS, STC	LONG
26	Support development of Balloch as hub for walking and cycle routes.	CP	NPA, WDC	LONG

Transport



There is excellent access to the National Park:

- it is within an hour's travel of over two million population
- it is within an hour's travel of two of Scotland's largest airports
- the main tourist route to the North West Highlands runs through it.

There are, however, major challenges for transport around and through the Park.

The A82 forms one of two primary transport corridors linking the north and south of the Park, the other being the A85 between Callander and Crianlarich. For much of its length within the boundary of the Park the A82 is of a good standard and in places there are adjacent off-

carriageway facilities for cycling and walking. There is, however, a notable deviation from this picture at the section between Tarmachan and Inverarnan. For many decades this section has suffered from acute under-investment resulting in today's sub-standard road, which in most respects is not fit for purpose. Being a crucial transport corridor, this situation presents both a major economic bottleneck and also a major opportunity. The opportunity is to create, alongside the imperative fit-for-purpose transport corridor, a high quality scenic route incorporating appropriate roadside facilities and formal viewpoints that showcase one of Scotland's finest lochs and landscapes. There is, arguably, the potential for the A82 to rank alongside some of the world's greatest lakeside roads if a suitably ambitious and creative approach is adopted.

The other major challenge is to improve the ease of travelling within the Park. 90% of visitors arrive by car. We recognise that

the majority of our visitors will continue to come by car in the foreseeable future but we want to provide attractive options which grow the uptake of more sustainable transport options once in the Park. The challenge is to integrate more seamlessly the transport options that exist and to encourage people to use foot, cycle and boat transport opportunities by linking cars to water to cycle networks to short, long distance and hill walks. This has begun with the successful waterbus initiative on Loch Lomond and it should be developed and extended to Loch Katrine, linking Loch Lomond and the Trossachs.

The West Highland Line is another transport asset with further tourism potential. It is internationally recognised as a great scenic journey. Stations at Arrochar and Tarmachan, Ardlui, Crianlarich and Tyndrum give access to the Park and all stations are near Munros and long-distance walks.

PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
27	Ensure tourism role of roads is considered in upgrades to main routes through the Park	NPA, TS	VS	MEDIUM
28	Investigate innovative means of addressing transport challenges to encourage sustainable experiences	NPA, SE	TS	MEDIUM
29	Grow water based transport to connect tourist attractions. Develop further the Loch Lomond waterbus and water based transport on other lochs	NPA, BS	NPDG, VS, SE	MEDIUM
30	Explore opportunities for further joined up transport and activity experiences	NPDG	NPA, BS, SE, VS	MEDIUM
31	West Highland Line. Seek full coverage of rail access and heritage in all paths leaflets produced for villages with stations. Seek active promotion of outdoor activities from stations	VS	NPA, Scotrail BS	MEDIUM
32	Work with partners to ensure scenic views from West Highland Line maintained	NPA?	FOWHL	MEDIUM

Accommodation



There are around 19,000 bed spaces in total within the National Park. Accommodation capacity is split almost equally between serviced, self catering and holiday parks, with 5,796 fully serviced, 6,000 self catering and 7,520 holiday park bed spaces.

Only 33% of serviced properties are members of the VisitScotland grading scheme. Although this accounts for 65% of total rooms, it is lower than for other destinations in Scotland. The average grading for self catering is above the Scottish average but the average grading for the served sector is below the Scottish average and the SE accommodation review (2011) highlights that across the Park the accommodation quality threshold would benefit from being raised.

The report identifies areas of opportunity around the Park for various types of accommodation

to meet differing markets. The areas for development coincide with the National Park Local Plan.

The Local Plan identifies Callander, Balloch, Drymen, Arrochar and Tarbet as appropriate locations for further tourism development to improve and develop the visitor offer as well as zones of lesser scale development outside of settlements in Cowal and the Trossachs.

The objective is to attract private sector investment in high quality accommodation with associated visitor services which will improve and enhance the current offer.

PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
33	Identify gaps in accommodation provision and, working with partners such as SDI, promote opportunities to investors	SDI	NPA	MEDIUM
34	Promote quality across accommodation and range of provision, from hostel to five star, to meet market needs	VS	NPA, BS	SHORT

ICT

Fast broadband is something that is expected by visitors and vital for our tourism businesses. Some areas in the Park suffer painfully slow internet connections or no coverage at all. Visitors should be able to download or stream high-quality digital content but currently in some parts of the Park it is hard to load a simple web page. There is a requirement to define the issue across the Park and to develop a strategy with partners to implement solutions.

PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
35	Map current broadband coverage in the Park	NPA	LA's	SHORT
36	Lobby Scottish Government and Local Authorities to ensure Park considered for investment opportunities	NPA	LA's	MEDIUM
37	Support communities to develop community led solutions where appropriate	COMMUNITY	NPA	MEDIUM



Products



THE PARK'S ASSETS ARE:

- Natural Heritage
- Cultural Heritage
- Active Sport – running, hill running, rock climbing, cycle races
- Wildlife
- Activities that the natural and cultural heritage present – low level walking, hiking, hill climbing, cycling, mountain biking, golf, motor boating, sailing, canoeing, fishing, horse riding



The scenery and landscapes are the main reasons for visiting the Park but to provide a complete experience, retain visitors and encourage spend there is a need to offer a range of products to meet their needs.

There are many ways to explore the Park that can be combined with an activity such as cycling, walking or wildlife watching. There is a strong international market interest in these activities. A study (by Adventure Travel Trade Association, 2009) of 128 adventure travel companies found that the top five activities were:

HIKING/WALKING	81%
CULTURAL ACTIVITIES	68%
TREKKING	55%
WILDLIFE/NATURE	54%
VISITING NATIONAL PARKS	53%

Activities have a wide appeal in the domestic market with over a third of UK visitors to Scotland participating in walking during their holiday. The traditional view of adventure tourists is that they are young or middle-aged people, and usually men. This stereotype is changing and research from VisitScotland and beyond indicates that the market for adventure tourism activities is expanding considerably. Of VisitScotland's six market segments, four indicate an interest in active pursuits which illustrates how important adventure activities are to visitors to Scotland. The Park is exceptionally well placed to provide these activities.

For land and water activities the National Park is one of Scotland's foremost destinations. It has 21 readily accessible Munros,

including Ben Lomond, and 19 Corbetts. It has over 23 lochs including Loch Lomond - the largest freshwater loch in Scotland. Around the Park there is 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. The National Park's Outdoor Recreation Plan (ORP) outlines commitments and intentions which will enhance outdoor recreation opportunities across the National Park over the next five years. The ORP includes actions and aspirations on all activities, from the most common such as walking to the more niche such as open water swimming and rock climbing.

There is a rich cultural heritage in the Park with religious settlements established over 1,000 years ago, centuries of Highland clan rule and, from the 1700s, an influx of famous writers, artists and poets inspired by the landscape.

The 2011 Valuing the Park study highlights that we have four million visitors, while the majority of our visitors do not take part in activities. More visitors undertaking one or more of the activities the Park has to offer will mean more visitors are likely to stay longer, spend more, have an enhanced experience of the Park and feel greater wellbeing.

The study highlighted that visitors do not have enough information

about the opportunities that are available, such as walking, cycling etc.

There is an opportunity to work closely with private businesses to provide more knowledge about what activities, attractions and services are available across the Park ensuring that these can be promoted to customers, identifying where businesses can combine complementary products and services to offer visitors a more seamless and more enjoyable experience.

The Valuing the Park study also highlighted that almost 30% of visitors wanted more places to eat and drink, suggesting that there is a need to grow the offer

in the Park and provide more opportunities for visitors to experience quality food and drink sourced from in and around the National Park.

It is important to make the most of our unique heritage. A combination of packaging existing products in more innovative ways and developing new products is required to meet changing market expectations.

To appeal to a range of markets requires a breadth of offerings which are provided as joined up value added authentic experiences. The challenge is to translate our assets and individual product offerings to seamless unique visitor offers that today's visitors want.

PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
38	Raise the profile of long distance routes and increase the number of visitors and the opportunities for businesses along the routes	NPA, LAs, VS, SE, FC, WTS	LAs, VS, SE, BS	MEDIUM
39	Explore opportunities to work with partners to make path networks at a range of levels easily available to visitors	NPA	NPDG, VS	MEDIUM
40	Make information about walks readily available to visitors	VS	FC, NPA	SHORT
41	Produce and implement a plan with partners for development and promotion of mountain biking	NPA	VS, FC, SE, BS, CCNR	MEDIUM
42	Explore opportunities to promote the sections of NCR7 and other cycle routes in the Park, including identities, packaging, business collaboration	NPDG	NPA, BS, SE	SHORT
43	Development and promotion of heritage trails for towns and villages with consistency of information	CDT	FOLL, NPA, LAs	MEDIUM
44	Involve transport, land and water operators, where appropriate to facilitate cycle journeys and products	BS	NPA, VS, SE	SHORT
45	Encourage development of new quality heritage experiences	CP	NPA, LAs, CDT	MEDIUM
46	Develop a plan for promotion of quality Scottish food and drink in the Park	NPDG	NPA, SE, VS, LAs	MEDIUM
47	Encourage businesses and other interests to collaborate to develop packages of itineraries and products that provide a coherent and quality offering alongside marketing with consistent messages	VS, NPDG	NPA, BS	SHORT
48	Encourage businesses to tap into audiences' increased usage of digital technology such as apps, SMS, email and web to communicate with customers by their preferred means before, during and after their visit	VS, NPDG	NPA	SHORT

Events

Events can raise the profile and showcase the area's assets through national and international media coverage, give it a vibrancy to attract visitors and enhance the quality of life of Loch Lomond & The Trossachs National Park as a place to live and work.

The national events strategy focuses on major events to attract the maximum number of visitors over the longest possible period. It takes into account events that are suitable for staging in rural Scotland, where the events can highlight the specific attributes of a region.

The focus will be on promoting regional events which reflect the brand values of the area and developing occasional national or international events which raise the profile of the Park. These will be events which feature one or more of our assets.

A range of events take place across the National Park throughout the year. Many of these are outdoor events such as walking festivals, sporting events (cycling, running, etc) and highland games. There are also a number of live music and arts events. There is a trend for events to offer both a sports and cultural element and this will be encouraged as a means of strengthening the offer by featuring more than one brand asset.

Most events are what are termed animation events, not a primary driver of visitors to the destination, however add to the



overall experience, extending stays and encouraging repeat visits. These include farmers' markets, highland games, and ranger led events. Some events are niche events - they attract niche markets that will travel long distances to attend - these would include some sports events. Events which have the ability to have a significant economic impact on the destination are signature events, these are likely to be small in number and may not happen every year. Scotland, the celebration of 200th anniversary of the Lady of the Lake in 2010, was the first signature event developed in the Park.

The National Park aims to have an event programme which reflects the brand assets and includes a range of events across animation, niche and signature level.

There is a requirement to coordinate promotion of the range of events to position the destination as a vibrant place to visit.

The majority of events in the Park will be independently organised but where there



are gaps, particularly at the destination signature event level, the Park Authority may lead event development on its own or with partners. The National Park Authority aims to maximise the opportunity of 2014 with the Commonwealth Games, 700th anniversary of Bannockburn, the Year of Homecoming and the John Muir anniversary all taking place.

The development of new events will be evaluated against the media exposure they will generate, the economic benefits to the area, fit with the national event strategy and the local event plan.

PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
49	Capitalise on 2013/ 2014 – Year of Natural Scotland/ Commonwealth Games/ Ryder Cup/ 700th Anniversary of Bannockburn/ Centenary of John Muir/ Homecoming 2014	SNH, NPA, VS ES, JMT	LA's, NPDG LDG, Sport Scotland	MEDIUM
50	Create an event plan for the National Park	NPA		SHORT
51	Promote a calendar of events that reflect the destination brand	NPA	LDG, NPA, NPDG	SHORT
52	Encourage development of new community or private sector led events which help create a vibrant Park	COMMUNITY	NPA	MEDIUM
53	Create a one stop contact at the National Park for event organisers	NPA	ES, LA's	MEDIUM
54	Introduce a sustainable events checklist for use by event organisers	NPA	ES, LA's	MEDIUM
55	Produce a plan for National Park ranger involvement in events	NPA		MEDIUM

Accessible Tourism

Accessibility affects a significant proportion of the tourism market. One in eight people worldwide live with a disability. It is essential that the National Park considers accessibility requirements to ensure suitable access to all visitors when planning projects. Wherever possible all provision for activities should be carefully designed to enable participation by all, enabling people with access requirements to enjoy the destination to the full. This

will not only benefit those with access requirements, but also parents with small children, senior travellers and people with temporary injuries, as well as their travel companions.

The Park aims to be an area which provides high quality all-ability access opportunities around towns and villages and in semi-wilderness surroundings. Specific access issues that require to be addressed are identified in the Outdoor Recreation Plan.



PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
56	Provide high quality all-ability access opportunities around towns and villages and in semi-wilderness surroundings	NPA, FCS SNH	LA's	MEDIUM
57	All abilities access opportunities well promoted and shared with visitors	NPA, VS	NPDG, LDG	MEDIUM

Sustainability

Sustainable tourism is tourism committed to generating a low impact on the surrounding environment and community by acting responsibly while generating income and employment for the local economy and aiding social cohesion.

Sustainable development (and therefore sustainable tourism) takes into account three central points:

- the necessary interactions between the environment and economic activity;
- long-term time scale; and
- inter as well as intra generational equity, providing for the needs of current societies without compromising the ability of future generations to meet their own needs

These points are central to the management of the National Park. The National Park has a central role in visitor management to ensure that all tourism development is sustainable and that the very reason for people visiting is not degraded.

Of the National Park's three areas of work **Rural Development**, **Conservation** and **Visitor Experience**, Conservation takes precedent.

The National Park's planning function ensures that private investment is guided and focused to complement and support those destinations within the Park that can provide a high quality visitor experience whilst conserving and enhancing the Park's special qualities.



Measuring Success

Private sector investment, overnight visitor stays and visitor satisfaction will be the key measures by which we will gauge how well we are doing.

PRIORITY FOR ACTION		LEAD PARTNERS	OTHER ORGANISATIONS	DELIVERY TERM
58	Measure value of private sector investment	NPA	BS	MEDIUM
59	Audit accommodation capacity	SE	BS	MEDIUM
60	Measure visitor numbers staying overnight annually	VS	BS	MEDIUM
61	Undertake regular visitor survey to measure visitor satisfaction	NPA	BS	MEDIUM



LOCH LOMOND & THE TROSSACHS NATIONAL PARK



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