



Developing and Managing Tourism in Coastal North Carrick Report



[Source: [Scotland's Great Trail](#)]

“Now’s the day and now’s the hour”

(Robert Burns)

Developing and Managing Tourism in Coastal North Carrick Report

Table of Contents

1. EXECUTIVE SUMMARY
 2. CONTEXT (Outputs of Brief & Methodology adopted)
 - 2.1 Outputs
 - 2.2 Methodology
 3. STAKEHOLDER CONSULTATION FINDINGS
 - 3.1 Summary of Stakeholder Consultations (one to one)
 - 3.2 Summary of Stakeholder Consultations (survey)
 4. MARKET & VISITOR PROFILES AND TRENDS
 - 4.1 Context
 - 4.2 Scottish Tourism Index
 - 4.3 Drive Time
 - 4.4 Visitor Profile
 - 4.5 Visitor Attractions and Visitor Numbers
 - 4.6 Visitor Characteristics
 - 4.7 Scottish Tourism Trends
 5. PROJECT PROPOSALS AND PRIORITIES
 - 5.1 Identifying and taking forward priority projects
 - 5.2 Review of Existing Development Plans
 - a) 'Development Programme 2019 -24 Dunure the Jewel on the South Ayrshire Coast'
 - b) 'Kirkoswald, Maidens and Turnberry Development Plan 2021 -24'
 - 5.3 Public Toilet Provision
 - 5.4 Enhancing the quality of the visitor experience
 - 5.5 Monitoring of Visitors
 - 5.6 Coastal North Carrick Tourism Partnership (CNCTP)
 6. ACTION PLAN
 7. SWOT ANALYSIS
 8. BEST PRACTICE CASE STUDY EXAMPLES
 9. DELIVERY VEHICLES AND FUNDING OPPORTUNITIES
- APPENDICES
- Appendix A) References/ Sources
- Appendix B) Stakeholder Consultees
- Appendix C) Stakeholder Interview Proforma Template

Developing and Managing Tourism in Coastal North Carrick Report

1 EXECUTIVE SUMMARY

This report, which was supported by the NatureScot 'Better Places Green Recovery Fund' following a funding application by the coastal North Carrick communities, represents a review of the work previously undertaken by the North Carrick Community Benefit Company (NCCBC) in conjunction with the communities of Dunure & Fisherton and Kirkoswald, Maidens & Turnberry (KMT) in the production of development programmes for both communities, and a consideration of future opportunities and priorities in light of the changed market dynamic and consumer behaviours as a result of the COVID-19 coronavirus Pandemic.

Despite all of the upheaval that the Scottish tourism industry has experienced as a result of the global health pandemic, the enduring destination assets for visitors to this part of South Ayrshire have not lost their appeal and include:

- accessibility from population centres of the central belt of Scotland;
- outstanding scenery of the Firth of Clyde;
- the combination of the rugged coast, sandy beaches, rolling farmland and rugged uplands;
- opportunities for access to open spaces for land and marine adventure tourism;
- rich history and heritage as exemplified by the magnificent Culzean Castle and Country Park;
- a friendly welcome;
- and a diverse range of accommodation from camping and caravanning, glamping, high quality self-catering and the five-star luxury of the Trump Turnberry Resort.

For a number of years South Ayrshire has appealed strongly to the domestic Scottish and UK market, and has also been a popular day trip destination, a market positioning heightened in 2020, and set to continue in to 2021 and beyond, in what has been labelled 'ultra' domestic tourism. There is recognition that these communities are an important part of the South Ayrshire visitor experience and that there is a mutual dependency and synergy with 'gateway' communities like Ayr and Girvan, other communities in South Ayrshire and Dumfries and Galloway, and as part of wider Ayrshire and Arran and South West Scotland offer. There is a collective aspiration to greatly increase awareness in key markets as to what this part of Scotland has to offer visitors, and that there are opportunities to draw on the strengths of the destination assets to attract more staying visitors over a longer season to sustain more job opportunities for local people and create more shared value in the communities.

Underpinning investment in infrastructure and amenities must be the principles of sustainable and responsible development, striking a balance in bringing equal benefit to local residents while at the same time enhancing the quality of the visitor experience. Future development must respect the capacity of the communities to accommodate visitors, help manage the impacts of visitors, be in keeping with the essence and integrity of the special nature of each place, and at the same time bring added value and benefit to the communities.

Through the drafting of this report the passion demonstrated by locals and their pride in place has been apparent. Also an appreciation of the huge commitment to ensure investment in these communities is secured to enhance the quality of life for residents and

the visitor experience that matches the natural appeal of each place. In this report we will investigate how best to focus this energy to realise shared aspirations for these communities.

The report reaches a number of conclusions and recommendations which in summary are:

- a) based on stakeholder feedback it is evident that significant energy and engagement exists in the local communities of Dunure & Fisherton and Kirkoswald, Maidens & Turnberry, with community groups championing the interest of residents to ensure these are great places in which to live, work, invest and visit, with the existing Development Programmes representing a well-grounded and sound basis on which to progress responsible and sustainable tourism development ambitions to maximise the community benefits while minimising any negative impacts;*
- b) drawing on an enduring and strong set of destination assets there is significant opportunity at this time, as a result of changed consumer and market behaviours arising from COVID-19 restrictions on movement, to capitalise on the 'staycation' trend for Scottish and UK visitors looking for escape to rural areas and to reconnect with nature, with the Coastal North Carrick destinations needing to ensure that the visitor experience to be found in the area matches market demands and capitalise on the opportunity to create more shared value for the community through converting more visits to overnight stays and extending the visitor season;*
- c) COVID-19 has put a temporary brake on community-led development aspirations but through coming together on commissioning this report new impetus and momentum can be gained through collaboration to shape a new Coastal North Carrick Tourism Partnership (CNCTP) that will engage with key local stakeholders and act as a driving force and exemplar community destination leadership, development, management and promotion collaboration;*
- d) the CNCTP creates the opportunity to align community aspirations to create a clear set of destination development opportunities and priorities (as set out in section 5 of the report) and a combined set of actions (as set out in section 6 of the report) that are aligned to enhance the overall community benefit, will capitalise on distinctive destination assets, deliver the highest quality visitor experience, avoid competition for scarce resources, provide a unified voice for engagement with key agencies and bodies, create a platform for a test bed of pilot projects on community led tourism development and realise an exemplar set of best practice initiatives and interventions (progressing the ambition of the CNCTP will be assisted through employment through the NCCBC of a project officer);*
- e) the CNCTP will also develop a strong set of destination narratives and themes that establish a strong brand identity, itineraries and packaged tourism product and visitor experiences that capitalise on destination assets (such as 'the Bruce country', 'Adventure Tourism', 'the jewel on the South Ayrshire Coast'), and that will advance the aspirations of the new body 'Destination Ayrshire' to raise awareness of Ayrshire as one of Scotland's foremost visitor destinations and create innovative and new destination experiences and opportunities to attract new investment in the visitor infrastructure.*

2 CONTEXT (Outputs of brief and methodology adopted)

2.1 Outputs

The key outputs identified for this project include:

- ☐ A Coastal North Carrick Overview Report providing information and data common to both communities – e.g., tourism management best practice, potential for joint initiatives, visitor demographics, 90-minute tourism catchment area, tourism trends, etc.
- ☐ A Report for each of Dunure, and Kirkoswald, Maidens and Turnberry, as stand-alone destinations, focusing on their particular issues, solutions, and opportunities, etc.

The scope of the consultancy brief is focused on three key areas:

- *Visitor management scoping and evidence gathering;*
- *Developing options and designs for countryside/ green infrastructure and/or service;*
- *Developing visitor management plans.*

With specific activities being expanded as per the table below:

Visitor management scoping and evidence gathering:
Undertake an 'assets' audit to identify current capacity and provision for visitors and key environmental or community constraints.
Prepare a visitor profile gathering evidence on who visits, from where, when, why, motivations, demands/needs etc. and any emerging trends/changes.
Gather and analyse evidence of visitor pressures, issues, conflicts, and impact, including e.g., local intelligence, user data, traffic counts, visitor surveys, safety issues, erosion data etc.
Identify interest groups/stakeholders including landowners and land managers, community, business, visitor interests, organisational interests etc. and prepare an engagement plan to be implemented during the assignment.
Review and assess policy to identify related plans and local activity such as community action plans, visitor destination/tourism plans, designated or protected areas, active travel developments, core paths, forestry plans, car park strategies etc.
Undertake digitally based stakeholder engagement activity.
Developing options and designs for countryside/green infrastructure and/or services:
Undertake desk research which identifies well-designed and innovative solutions to rural tourism issues including e.g. public toilets in rural and natural settings, initiatives to reduce the number of arrivals by private car
Outline skills and training development needs for stakeholders and volunteers and propose options for meeting those needs.
Developing visitor management plans:
Develop a co-design framework on which to base future sustainable visitor management planning activity involving wider engagement e.g. vision and objective setting, prioritising areas for action.
Undertake an initial SWOT analysis.

2.2 Project Methodology

A desk search review of existing data on visitors to the coastal North Carrick communities was undertaken, and the most pertinent data insights are set out in Section 4 on Market & Visitor Profile and Trends, which clarifies specific market opportunities.

Important sources of visitor insights and data drawn upon included those produced by VisitScotland who in January 2021 published their latest Ayrshire & Arran Factsheet 2019 and the Insight Department Trends 2020 Report. It is important to note that the fact sheet data from VisitScotland along with other data sources is historic data, and is therefore not representative of significant market shifts in consumer behaviours and activities impacted by the global COVID-19 coronavirus pandemic. What is clear from research is that Ayrshire & Arran's tourism profile even before the COVID-19 pandemic was dominated by domestic visitors, approximately nine out of ten visitors and three quarters of overnight spend, mostly from Scotland (over half of visitors).

It is also important to note that the VisitScotland research is at an Ayrshire & Arran level and there is no fine-grained visitor research for visitors to the Coastal North Carrick communities. However, the key data from this report is considered to be representative, a valid indicator of visitors to the North Carrick communities, and reflects the visitor profile insights vocalised by local stakeholders.

To get a sense of some of the changes in consumer behaviours that are impacting post COVID-19 we can however draw on sources such as the regular research produced by 56 Degree Insight which has been monitoring shifts in Scottish consumer attitudes and behaviours in relation to tourism and travel brought about as a result of COVID-19 restrictions since the spring of 2020.

The biggest paid attraction in the immediate locale is Culzean Castle and Country Park operated by the National Trust for Scotland, and visitor data was obtained from the National Trust for Scotland.

Over the period 1 to 25 March 2021 twenty-nine individual one-to-one stakeholder interviews were conducted over the telephone with local community and business representatives and also a number of representatives from organisations out with the immediate coastal North Carrick communities. Insights from the stakeholder engagement exercise are explored in section 3.

In addition an online self-complete survey was circulated through social media and local contacts to which there were 64 responses. Insights from the stakeholder survey are also set out in section 3.

3 STAKEHOLDER CONSULTATION FINDINGS

3.1 Summary of Stakeholder Consultations (one-to-one)

A requirement of this piece of consultancy work was to enhance engagement with stakeholders. In total 29 one to one consultation conversations were held with local (and some national) stakeholder representatives from local community organisations, businesses, landowners, and public agencies using a standard set of questions (see appendices). This exercise created the opportunity to explore perceptions on the key opportunities and challenges for the communities and establish an understanding of a shared set of priorities. The key stakeholder observations and perspectives are summarised below:

i) The main market appeal for the area was identified as the scenery (spectacular views and sunsets), the rugged coast and lovely beaches, access to the countryside (rolling farmland, and uplands, lochs and forests of South Ayrshire and Galloway), the history and heritage (fishing history, Robert the Bruce and Robert Burns), Culzean Castle and Country Park, and of course the Trump Turnberry Resort with the world-famous Turnberry golf course and iconic lighthouse.

ii) In addition visitors are attracted to the area because of the accessibility from West Central Scotland, there being a strong locally based day trip market especially to Culzean, the beaches and for walking and water based recreational activity (sunny weather stimulates visits). There is an existing short break market to the area with the majority of visitors visiting in the period April to September. However, as has been evidenced in other parts of rural Scotland there is the opportunity to extend the visitor season if visitors believe there is enough to see and do in the area.

Coastal North Carrick is characterised by a high number of mobile homes / static caravans (many of them 'owned' rather than let and some with long term residents, perhaps up to circa 20% of occupancy), a mix of self-catering accommodation (including farm diversification such as glamping developments), some touring camping and caravan provision, and also five-star accommodation at the Trump Turnberry Resort, nearby Glenapp Castle Hotel and Blairquhan Castle. There are differing views on the numbers of visitors using motorcaravans to visit the area and levels of 'informal' camping that is taking place (monitoring of this could be helpful). Also on levels of 'wild' and more worryingly 'dirty' camping. There is an aspiration to encourage more overnight stays in the area as this will enhance the economic value of tourism locally.

Historically there has been a strong weddings market at Culzean and the Turnberry Resort. Culzean also mentioned the increasing number of self-catering guests in multi-generational groups and the increase in 2020 of family groups visiting the property. A number of people mentioned the importance of the TV series 'Outlander' as a draw for visitors to Dunure Harbour and now featuring on VisitScotland's locations map.

The high quality of the natural environment and diversity of the landscape in South Ayrshire represents an opportunity to capitalise on the recognised trend for wellbeing tourism. This can link to developments in agritourism and is year round in nature and often multi-generational. There are also opportunities to link into the high quality of the local produce, and quality dining experiences.

The COIG 'shire route' identifies both Maidens and Dunure as places of interest and Maidens and Turnberry also feature on the SWC300 driving route. The soon to open Maybole bypass on the A77 will help accessibility to Kirkoswald, Maidens and Turnberry. Investment in the physical regeneration of Maybole creates the opportunity to stimulate provision on new local visitor services. It is important to note that in terms of a brand the

ambition is to raise awareness in key markets of the Ayrshire (& Arran) brand in key domestic and some international markets, and that consumer awareness of Coastal North Carrick as a brand would potentially be counter-productive. It will be important to present strong narrative about the visitor experience around themes such as the history and heritage (Burns Country, the home of King Robert the Bruce, maritime and farming heritage, Clan Kennedy) and activities such as adventure tourism (walking, cycling, water-based sports). Dunure features on the VisitScotland 'Outlander' locations map and itineraries.

It is recognised that the primary focus should be on ensuring the highest quality visitor experience and product, linking this product (things to see, places to eat and stay) in itineraries for visitors. Raising the profile of the communities will be achieved through collaboration with the emerging 'Destination Ayrshire' organisation and through peer to peer recommendation / word of mouth (primarily via social media) by visitors and residents.

iii) Stakeholders identified key destination assets and strengths to be the natural beauty of the coast and countryside (a place to discover nature and relax), the seascapes, scenery and sunsets (a pull for artists and photographers), a diversity of visitor attractions (including Culzean Castle and Country Park, Dunure Castle & Kennedy Park, Burns Country and Souter Johnnies, Heads of Ayr Farm Park), the coastal path, walks and cycling, the welcome from the local people, history and heritage, the Electric Brae, Turnberry Golf Course, accessibility by road, the harbours at Maidens and Dunure, and the opportunities for adventure tourism and water based sports like kayaking, paddle boarding, sailing and sea rowing, and there are a few 'destination restaurants' in the area like Wildings in Maidens and Souter's Inn in Kirkoswald.

iv) Stakeholders were asked to identify opportunities for the communities and the destinations. Interestingly the growth in 'ultra-domestic' tourism in Scotland in 2020 as a result of the COVID-19 coronavirus Pandemic and the rediscovery of many of what is in our back yard was seen as an opportunity for South Ayrshire and these Coastal Communities. Especially as there is strong evidence that visitors are looking for quieter rural locations where they can escape urban population density and get back in touch with nature for their physical and mental wellbeing. It is recognised that the destination assets in South Ayrshire and the wider South West Scotland Area offer great potential to attract a new market to the area. The development of new self-catering accommodation and glamping pods and adventure activities linked to nature, the outdoors and landscape is a strong selling point. The demand for this on a more year round basis is also seen as an opportunity.

A key perspective was that awareness of the communities and the visitor appeal of Dunure & Fisherton and Kirkoswald Maidens & Turnberry was generally for people '*in the know*', many of whom had been coming to this part of the Ayrshire coast for a number of years or with their families in the past. For many visiting here was part of a 'nostalgia visit'.

The feeling was that this part of the coast was one of Scotland's '*best kept secrets*' with the exception perhaps of Culzean and Turnberry of which there is specific and wider market awareness. Dunure already uses the byline of '*The Jewel on the South Ayrshire Coast*' which reflects the distinctive and special character of the settlement.

Work has begun in Dunure in enhancing the 'housekeeping' of the public spaces around the harbour and Kennedy Park with new paths and signage as well as new tourist signage on the A917 coast road. In Dunure opportunities revolve around making the most of the setting of the Castle, the Kennedy Park and the Harbour. Enhancing the link between the park and the harbour is essential. Ensuring good visitor services of signage and interpretive panels, footpaths, toilets, parking, quality play equipment and picnic tables and benches, all weather parking spaces, potential 'informal' motorcaravan facilities are all considered important. It is acknowledged that the village is under served for eating places, a situation worsened by the

closure of the Dunure Inn, and this means that the community is missing out on an opportunity to create shared value from visitors.

The fishing heritage, inspiration for artists and photographers, the Kennedy family story, the Ayrshire coastal path, coastal walks, flora and fauna and geological story are themes to develop as is the 'Outlander' TV series connection.

A strong community aspiration is the development of a 'community hub' in the park including a café to make the most of the scenery and views, a multi-use space and heritage centre represent an opportunity to enhance the amenity for residents, to create a source of income to ensure sustainability, and provide a venue for events such as exhibitions and weddings. The existing Festival of the Sea in Dunure (usually taking place in mid-July) is indicative of the type of community-based events that can be delivered in the locality. From within the community and in conjunction with the local elected member and officials at South Ayrshire Council there continues to be active investigation of funding sources such as Heritage Lottery Funding to advance these aspirations.

In the Maidens and Turnberry opportunities exist around the natural assets of the beaches and harbour and proximity to Culzean Castle & Country Park and the iconic Turnberry lighthouse and castle ruins. Culzean has a strong family market (which strengthened in 2020 and has been drawn by the investment in adventure play) and Maidens and Turnberry should consider how to strengthen their visitor experience to appeal to this market. A focus on water sports and gaining skills associated with sea craft and water safety are a development opportunity.

The consensus in Maidens and Turnberry appears to be that the opportunity is about enhancing the quality of the visitor experience by building on existing investment in accessible footpaths and interpretation of local heritage and landscape (flora & fauna). Having Wildings Restaurant as a destination 'eating experience' is a positive for the village, and the eating and drinking experiences are enhanced by other facilities in the village, such as the Ropes Bistro. There are opportunities related to the development plans by the Bowling Club to create a community hub and multipurpose space (potentially including some presentation of local heritage and visitor information) and enhanced catering facilities and potentially public accessible toilet provision. It was noted that it is important that the food and beverage offer matches the expectations of the current generation of visitors. Further enhancement of the facilities and boat access to the marina and at the harbour has the potential to enhance the appeal of the location for sailing, boating and other water sports such as sea kayaking, paddle boarding, sea rowing, and wild swimming.

Kirkoswald is seen as having its own distinct visitor appeal and experience linked to the food and beverage and retail offer in the village and its position on the A77. The new Cook School opening in the village which is a social enterprise is seen as a good case study of different kinds of community-based ventures that can be realised. Replacement of the public toilets in Kirkoswald, Maidens & Turnberry is considered a priority by the communities, and there are potential opportunities for the development of self-catering accommodation owned by the NCCBC as a potential income generator to cross subsidise the operational costs of these new toilet facilities.

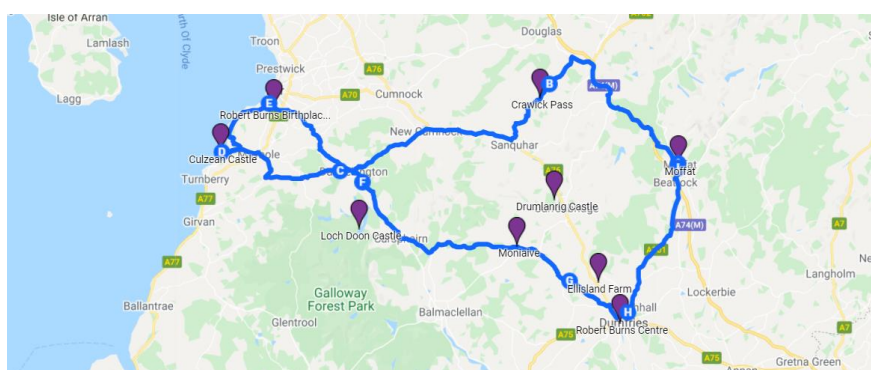
Making the most of the coast and waters is a key theme of the Ayrshire Growth Deal (AGD) and there are opportunities for coastal North Carrick to develop projects that will help progress this objective. The UNESCO Biosphere, Galloway Forest (and Dark Skies) Park and a potential Southwest of Scotland National Park covering part of this area, highlights the importance of taking a wider view of the geography of the area (visitors in general have no awareness of political geography and boundaries but explore areas based on thematic

interests), confirming the importance of heightening the awareness of the diversity of things to see and do in the wider area around different themes and itineraries.

Similarly there are opportunities connected with the AGD to progress TravelTech and the use of new technology to enhance the visitor experience through for example Augmented Reality, Virtual Reality and apps linked to Ayrshire and Scotland wide initiatives. Potentially also working in collaboration with the likes of the University of West of Scotland.

Across both communities (and as a powerful link between them) there are undoubted opportunities to make more of the adventure tourism and active recreation opportunities linked to the coast and countryside, for example walking and cycling routes (utilising the existing footpath links between the settlements and the likes of the proposed Culzean Way and existing Ayrshire Coastal Path and Whithorn Way), sea rowing, sea kayaking, sailing and paddle boarding and events associated with these recreational and sporting activities such as competitions and championships.

The Burns Country Run is just one example of walks and runs that thematically link coastal North Carrick to a larger inland area.



Source: <https://www.visitsouthwestscotland.com/attractions/burns-country-run/>

Improving the quality, promotion and awareness levels of long distance walking routes linked to green public transport improvements has the opportunity to make more of walking routes, and lessons can be learnt from the experience for example of the Fife Coastal Path and Speyside Way. “The Ayrshire Coastal Path (ACP) from Glenapp to Skelmorlie runs 100 miles along one of the finest panoramic coastlines in the British Isles” and deserves to be better known, but needs better promotion.



Source: <https://ayrshirecoastalpath.org/>

v) Stakeholders were also asked to identify the challenges and issues facing the destination (and community). In Dunure there are challenges relating to the need for significant investment in restoration of the physical fabric of the harbour including the lighthouse or light tower, and restoration work at Kennedy Castle and the doocot, climate change related weather and storms have the potential to cause significant deterioration in the physical fabric. There is need for enhanced safety measures and security lighting at the harbour and castle and for maximising accessibility for visitors. Addressing vehicle access and parking in Dunure is identified as an on-going challenge, and the option of additional (remote) car parking away from Kennedy Park and the Harbour is a medium to long term objective.

In the Maidens there are challenges around maintaining the quality of the physical fabric and environment in the village. The provision of a permanent solution to the provision of quality public toilets at the north end of the Beach is seen as the number one priority.

Keeping a balance between the needs of the resident community and that of visitors is seen as vitally important – the principles of sustainable and responsible tourism as articulated in the national tourism strategy Scotland Outlook 2030 represent a context here. Transformative and regenerative tourism are trends that will influence the development of South Ayrshire's tourism in communities like Girvan and Maybole for example.

Across both communities, key challenges are the quality of basic housekeeping in the area and maintenance of the physical fabric, including the quality of the road surfaces, maintenance of road verges, public spaces, road and pedestrian signage and footpaths in and between the settlements. An enhancement to the visitor experience would be to ensure affordable, reliable, sustainable and frequent public transport links (bus services) between the settlements and to the gateway communities, and the mainline railway stations in Ayr, Maybole and Girvan. Good local public transport also opens up local employment opportunities in the tourism and hospitality sector for local residents. An opportunity exists to pilot new green public transport initiatives in the area especially in the summer months to encourage modal shift and more sustainable access.

vi) Barriers identified by stakeholders focused primarily on the disruptive nature of the COVID-19 coronavirus pandemic which has knocked back progression of the existing Action Plans and Development Programmes.

Identified barriers to realising future development aspirations also included: ensuring that the neighbourhood communities are also vibrant and attractive places with good local services (communities like Maybole, Girvan and Ayr) Recognising that for visitors from across Scotland, the UK and internationally local geographies are not as important as general awareness of the wider Ayrshire and South West Scotland tourism offer.

Securing adequate financial resources were seen as a potential barrier to advancing the aspirations of the communities, securing resources that offer the flexibility to spend on community priorities. However, many respondents said that with strong collaboration and partnership working within the communities, agreement on a shared set of priorities between the different local community groups within the communities, the early delivery of projects to maintain energy and credibility, with the right facilitation and support from organisations like NCCBC and SAC and enhancement of capacity and capability this would help unlock resources. Formalisation of collaboration between the communities in progressing the development plans and formalisation of links with community development groups such as those in Girvan and Maybole could potentially strengthen their voice and progress their agendas with the new Destination Ayrshire body and South Ayrshire Council. Volunteer fatigue can be a barrier and therefore there is a need for wide engagement and activation of residents.

Working with VisitScotland, COIG, South Ayrshire Council, Nature Scot and other partners it would be useful to have more fine-grained and real time market intelligence about visitors to the area to help in advocacy for investment, future planning and visitor experiences and to gauge visitor satisfaction levels.

vii) When asked about the primary objective for future tourism the top answers were: to achieve balance in the interests of residents and visitors, that tourism development matched the capacity of the place, and that tourism development was true to the character of the place. A common view was that investment in key infrastructure should be seen as a catalyst, enabler and facilitator and context for private sector investment in accommodation, the food and beverage offer, retail, and visitor experience activity which will unlock visitor spend in the area. A key consideration for many stakeholders is the need to enhance the quality of life and amenity for local residents which will in turn help realise a better quality of visitor experience, alongside the opportunity to generate additional wealth creation and job opportunities in the local communities especially for young people.

Encouraging innovation in terms of new visitor experiences to match new emerging markets and consumer profiles in the area and innovation of new visitor products and collaborations in packaging of the visitor experiences is also considered to be important.

viii) The top priority for tourism in the destination were identified as in Dunure progression of the current environmental enhancement programme (i.e. signage and path improvements) and for an all-encompassing 'Dunure Heritage Plan' (covering Dunure Castle, the Kennedy Park and the harbour), and further planning and development work to progress the community hub and heritage centre. Next steps should include the creation of the necessary community development vehicle to progress formulation of a comprehensive heritage plan, in the form of an appropriate management vehicle bringing together community representatives, design options and applications for design and development funding. The design of any new build should follow accessible design principles, be of the highest aesthetic and build quality, in keeping with the sensitivity of the setting, making the most of the views, and be environmentally sustainable and energy efficient. In the immediate term, management of access, parking at the park and in the village, potential provision of some 'informal' motorcaravan parking in Kennedy Park, and provision for black and grey waste disposal should be explored.

For Maidens and Turnberry the top priority is identifying a permanent solution to public toilet provision, also enhancing the quality of the car parks and public open spaces, enhanced ground maintenance, enhancement of the existing path network to be fully accessible and high levels of general housekeeping. Revenue generation for the communities to reinvest in 'housekeeping' activity from for example charging for car parking and the new public toilet provision needs to be explored. Addressing the issues of safety and respectful use of jet skis in the Maidens Bay is an important action to progress, solutions may be the potential zoning of areas of the coast for different types of water sport usage, and encouraging safety training, raising awareness of and adherence to codes of safe and responsible practice for Jet Ski users.

In Kirkoswald progression of the identified actions in the development plan remains the priority, including new public toilets.

In general across the communities ensuring accessibility in terms of accessible and disabled friendly paths and pavements is important, as is enhancing the Ayrshire Coastal Path and promoting it more. Developing water based recreational activities and adventure tourism opportunities across coastal North Carrick (linking to the wider South Ayrshire and South West Scotland opportunities) and associated events.

ix) The most significant and important stakeholder seen as being critical to realising tourism aspirations in terms of physical developments was identified as a collaborative effort between different community groups, South Ayrshire Council and the private sector.

In progressing the communities' Development Programmes and Action Plans it was felt that these could be advanced more effectively through the support of a project officer potentially supported by external funds and the NCCBC, also the creation of a new Coastal North Carrick Community Tourism Partnership.

x) In Maidens & Turnberry there was seen to be an opportunity for closer working with the National Trust for Scotland. Also to keep close engagement between the key landowners including the Cassillis & Culzean Estate and the Trump Turnberry Resort.

In terms of promotion of the area working across the three Ayrshire Councils, COIG and South West Scotland and playing an active role with the new 'Destination Ayrshire' partnership was considered essential in the development of platforms to profile the coastal North Carrick communities, through website presence social media, apps, conventional marketing and gathering of real time market intelligence.

3.2 Summary of Stakeholder Consultations (survey)

A survey using SurveyMonkey consisting of ten questions was circulated electronically through local community networks over a period of eight days. The purpose was two-fold:

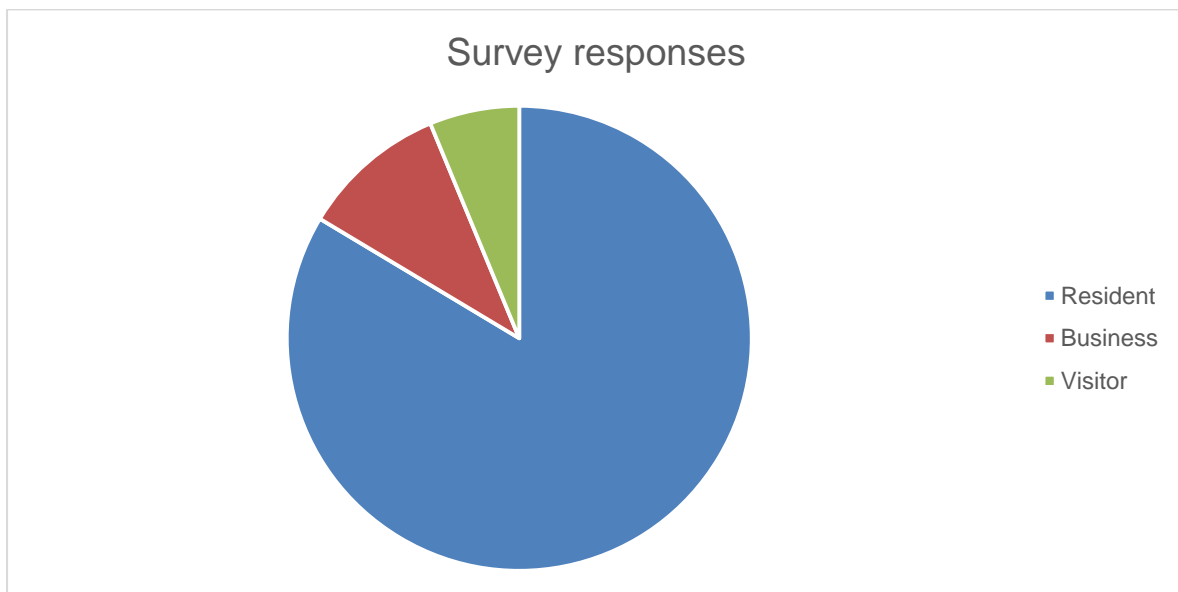
- (a) To obtain current insights about the present situation in coastal North Carrick
- (b) To determine the level of support for proposed interventions previously identified

There were 64 response to the survey and these responses were largely consistent and broadly positive, confirming that proposed interventions are germane and still supported by the local community.

Whilst the responses to each of the ten questions are summarised and analysed in this section, the implications are set out more fully in section 5. Some of the results are presented graphically as *word clouds*, in which the most frequent words are shown in a larger point size and commentary reflects additional responses.

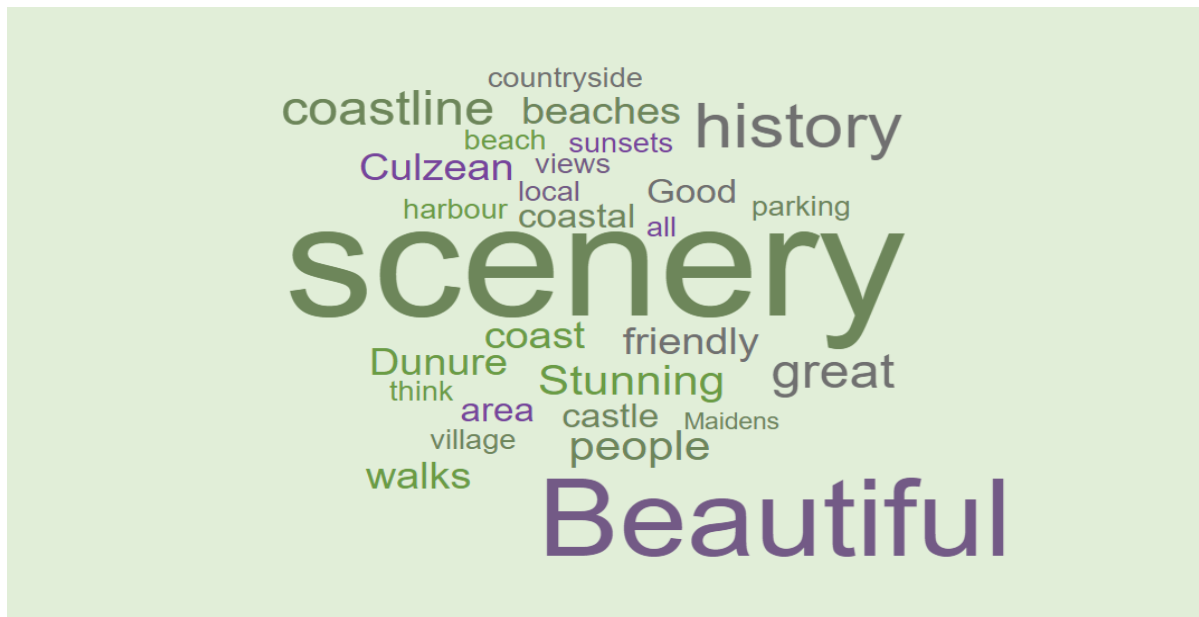
1. ***Analysis. How would you describe yourself?***

- 84% local residents
- 10% local businesses
- 6% visitors, including caravan owners



The high proportion of local residents (84%) indicates a representative sample, since an effective tourism strategy and destination management plan must ultimately show how tourism can deliver community benefit and ensure that the next generation has a future with access to secure jobs and affordable homes.

2. ***A place to live and visit. What makes you most proud of North Carrick? What's distinctive about it? Why should people visit North Carrick?***



With countryside bounded by a beautiful coastline facing west with stunning castles silhouetted against dramatic sunsets, local people are proud to live in a friendly area full of history. Harbours, beaches and villages are key features of the North Carrick landscape. It is worth noting that tourism is an important component of the South Ayrshire economy, with the local authority area in the top quartile for tourism employment (12%), which is well above the national average of 8% and comparable to rural tourism hotspots like Argyll & Bute (15%), Highland (13%) and Perth & Kinross (11%) and urban gateways like Edinburgh (13%) and Glasgow (10%). Employment however is centred on large sites like Turnberry and Culzean, rather than the small tourism enterprises that are more typical elsewhere in Scotland.

3. **Visitor profile. How would you describe the typical visitor to North Carrick? Where do they come from? What do they do here? Where do they spend their time and money?**



Visitors are accurately identified as being mostly day trippers and mainly domestic (“local”): invariably Scottish and largely urban, mostly from Glasgow and Ayrshire towns. Most are families and some are couples. People come by car and caravan to walk, visit beaches and some to play golf. Despite golf and castles being important components of the destination product, local people do not think of these users as contributing much to the local economy. Culzean Castle and Trump Turnberry are perceived as separate and unintegrated.

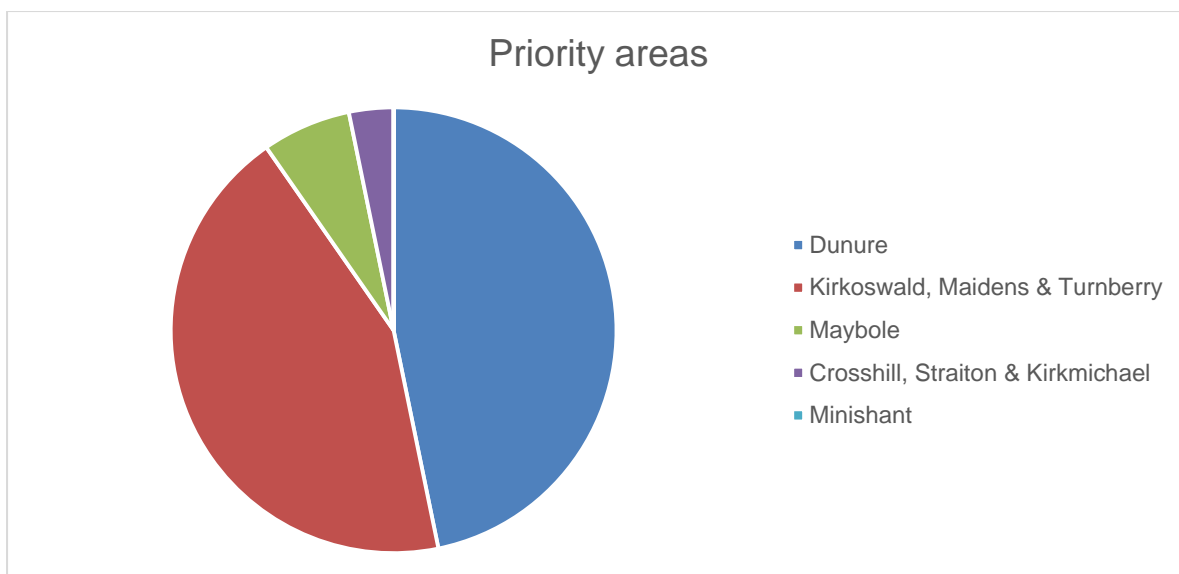
4. Problems. Thinking about the last couple of years, what are the biggest problems associated with tourism and visitors in North Carrick?



In most cases, the words shown are accompanied by “lack of”. Inevitably COVID-19 features amongst problems identified, but the key issues are parking (insufficient and/or expensive) and toilets, along with dog mess and litter, including a variety of phrases for human waste, associated with people staying overnight without sufficient facilities. Respondents repeatedly pointed to the limited range of restaurants, shops, pubs, cafes and other visitor infrastructure as preventing visitors making a contribution to the local economy. Without things to spend money on, people are also less likely to dwell, even if they wanted to spend money. The state of roads and walking and cycling paths reflected a lack of investment, undermining the amenity and marketability of the area.

5. Visitor opportunity. If one thing could be developed to enhance North Carrick as a destination for visitors, what would it be? What's the biggest investment opportunity?





Most respondents (90%) considered the two coastal areas the priority: Dunure (47%) and KMT (44%). Whilst all Dunure and Maybole residents thought their area was the priority, a number of non-resident visitors and residents of Crosshill, Straiton & Kirkmichael considered KMT the priority. Nobody selected Minishant. It is worth noting that, according to the Scottish Index of Multiple Deprivation (SIMD, 2020), north Maybole is the most disadvantaged area in North Carrick, sitting in the 8th decile and most in need of assistance, whilst eastern Maybole is the least deprived, being in the 2nd decile; coastal Dunure and KMT are all relatively affluent in the central 4th and 5th deciles; rural Minishant and Crosshill, Straiton & Kirkmichael sit in the more deprived 6th decile.

8. Development opportunities. The primary focus of this survey is on coastal communities, where several projects have been proposed in recent development programmes. What's your opinion?

	Development	Area	Weighted support	+ve support
1	Reinstate public toilets in Kirkoswald, Maidens and Turnberry	KMT	4.16	93%
2	Develop Maidens Harbour for fishing, leisure and tourism	KMT	3.73	92%
3	Develop Dunure Harbour for fishing, leisure and tourism	Dunure	3.60	89%
4	Develop a community hub and visitor centre in Maidens	KMT	3.33	81%
5	Improve signage and outdoor equipment in Kirkoswald and Maidens	KMT	3.22	76%
6	Establish a heritage centre with focus on Dunure Castle	Dunure	3.13	77%
7	Develop an aquatic activity programme on the Dunure coast	Dunure	3.11	82%
8	Enhance facilities for outdoor events in Kennedy Park	Dunure	3.07	77%
9	Establish 'Maidens Festival' as annual event (including Bruce 2024)	KMT	3.02	74%
10	Improve playpark and games area in Kennedy Park	Dunure	2.93	72%
11	Create wildfowl viewing point in Maidens	KMT	2.82	72%
12	Develop a food kiosk at Kennedy Park	Dunure	2.71	63%
13	Install decorative lighting at Dunure Castle	Dunure	2.68	67%
14	Establish community garden in Maidens	KMT	2.39	56%

Other practical suggestions include:

- Dedicated picnic sites, outdoor seating areas.
- Improved drainage in games areas, more secure playground, tennis courts.

- Reduced parking charges, enhanced motorhome facilities.
- Better path construction and maintenance, bridge connecting castle and harbour.
- Youth sailing courses and marine activities generally.
- Boat trips round Ailsa Crag, protected swimming areas.
- Art festivals, heritage centres and community hubs.
- Traffic calming, improved signage, better management generally.

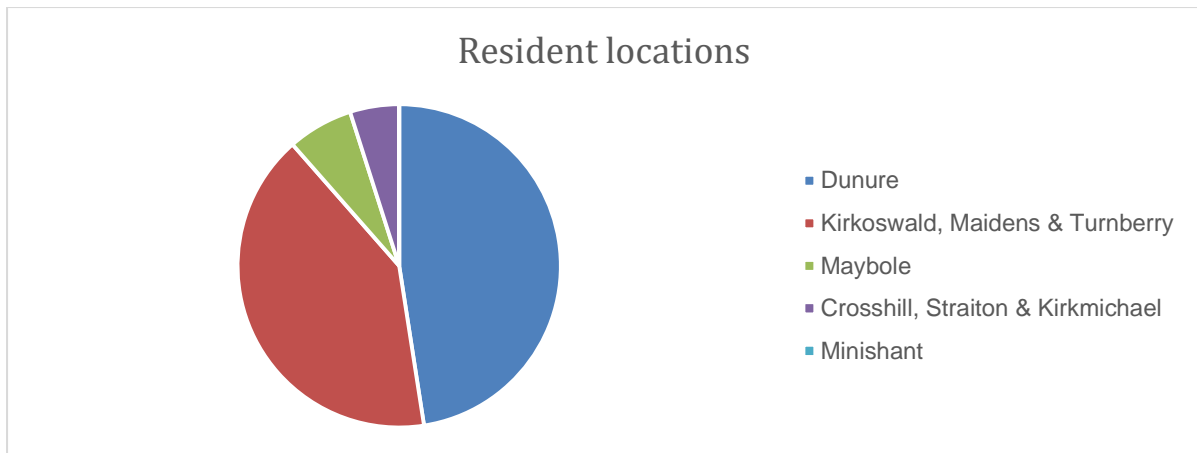
Of the various tourism-related interventions proposed in 2019 in the development plans for Dunure and KMT, all are still supported by at least half of all respondents.

- The first division (support > 88%) involves “housekeeping” (reinstatement of public toilets in Kirkoswald, Maidens and Turnberry) and major product development (development of harbours at Maidens and Dunure).
- The middle tranche (support between 73% and 88%) is an integrated range of initiatives that would broaden the appeal of North Carrick as a destination and at the same time enhance the amenity for residents with the possibility of offering additional facilities for visitors, including weddings and festivals.
- The third division (support between 50% and 72%) is a series of specific proposals that appear relatively modest, but – with the right approach – could be transformational for North Carrick.

Each initiative could be implemented in a range of different ways, some that would be more impactful than others. For instance, a “food kiosk” could be anything from a van with a kettle serving coffee and pot noodle to a gourmet food experience with seating serving fresh locally caught fish, rare breed pork sausages from local farms and organic vegetables grown in the community garden that becomes a destination in itself. The two harbours could be a launch site for visiting kayakers and also the hub for marine circuits around the Firth of Clyde and Sea of Moyle and across to Arran and the north of Ireland. An “art festival” could be a few pictures by local schoolchildren on the wall of a community hall or could be an internationally curated exhibition of world class art installations that is added to and renewed every year. “Decorative lighting” could be a few spotlights or a full-scale *son et lumiere* production for visiting Americans wanting to connect with their Bruce heritage. A heritage centre could be a room in the local community centre or could be an iconic new building offering genealogical research facilities and a venue for wedding receptions. A wildfowl viewing centre could be a small hide for local birders or Ayrshire’s answer to the Seabird Centre in East Lothian. “Sailing courses” could be a couple of dinghies for hire or SportScotland’s national sailing academy and the venue for a regular regatta.

It is worth noting that Ayrshire Roads Authority has consulted these communities about remedial road works, which are already in hand, but it is important that there should be provision for ongoing maintenance and continuous improvement.

9. Location. If resident and/or working in North Carrick, what is your primary location?



The vast majority (89%) of respondents were from the coastal areas of Dunure and KMT.

10. Further contact. If you are willing to be contacted for further discussion, please provide your contact details.

Precisely half of respondents were willing to be contacted again and provided an email address. The proportion is unusually high for an online community consultation and indicates widespread community commitment and a real willingness to engage and participate in the design and implementation of solutions.

4 MARKET & VISITOR PROFILE AND TRENDS

4.1 Context

There is a number of ways of segmenting the market for North Carrick, but none is entirely satisfactory, as these are all based on secondary sources and often include aggregated data for the whole of Arran and Ayrshire. The other issue is that the past year of COVID-19 has invalidated all forecasts and there can be no certainty about how markets will evolve in the coming years.

It is therefore important to acknowledge that with all data being historic it is more challenging to identify the significant changes in consumer behaviours and market dynamics that have occurred as a result of the COVID-19 pandemic. Nor what post-pandemic impacts there might be on the Scottish and global economy that will impact on levels of disposable income and discretionary consumer spend on tourism and leisure.

What is clear is that international travel is likely to be disrupted for some time (potentially up to a decade until there is recovery to 2019 levels). Also we need to bear in mind that the climate emergency and environmental concerns and changes might see 2019 being a peak for global tourism that may not be repeated.

It is clear that 2020 and 2021 (and potentially beyond) there is a trend for Scottish and UK visitors to take domestic holidays when restrictions allow. The phenomenon of 'ultra-domestic' tourism is real. Other trends have included the preference for domestic visitors to seek out rural locations to escape urban crowds and as a way to enhance their sense of well-being through reconnecting with nature.

4.2 Scottish Tourism Index

The market research company 56 Degree Insights over the past year have been undertaking regular online surveys of a panel of circa 500 Scottish residents on their tourism and travel intentions against the backdrop of the COVID-19 lockdown restrictions, with the most recent report Scottish Tourism Index Wave 5 published on 26 March 2021 (<https://www.56degreeinsight.com/scottish-tourism-index-march-21>).

This survey presents some of the most up to date intelligence and perspectives on the factors shaping the domestic tourism market at this time. Pertinent aspects of the report to Coastal North Carrick and the visitor market in 2021 are:

- There remains a general nervousness about travel and continuing desire to look close to home for holidays with a third of Scots seriously considering a 'staycation' in 2021.
- Scots holidays are most likely to take place in the third quarter, to rural locations (especially the Highlands), in self-catering accommodation and with an outdoors theme.
- 34% were in agreement with the statement that 'my personal finances are being impacted significantly by the current COVID-19 restrictions which is likely to impact on discretionary spend on leisure activities.
- Over a fifth of Scots are simply not thinking about holidays yet (22%) and 27% feel that holidays are something they won't be planning for some time.

- However, the remaining half of the population are more positive about taking a holiday this year – indeed 1 in 8 (12%) are desperate for a holiday and will take one as soon as they can.
- **Almost half (46%) of Scots are very likely or definite about taking a home holiday this year – and a further 24% are fairly likely – 7 in 10 Scots overall.**
- However the uncertainty of what will be possible this year means that only a small proportion of Scots have already booked a 2021 staycation (5%) while a larger percentage (32%) are just at the planning or consideration stages.
- When asked to rate the importance of different factors if they were to take a Scottish staycation high standards of hygiene and cleanliness were rated most highly. Mitigations to aid social distancing remain important but notably less so than in the summer of 2020. More important in 2021 were reassurances that there would be a range of places open to visit and where it would be possible to eat and drink.
- While 17% of Scottish staycations are expected to be taken before the end of June, a larger percentage (51%) are expected to take place between July and the end of September, and 14% in the last quarter. Reflecting the uncertainty amongst consumers, 18% of those planning a trip are unsure of when.
- **As in 2020, rural locations continue to hold greatest appeal with the Highlands leading the way, followed by Argyll, Edinburgh & Lothians, Aberdeenshire, Ayrshire & Arran and Perthshire.**



[Source: 56 Degree Insight]

- Also reflecting demand in 2020, self-catering accommodation continues to be the most popular for holidays planned for 2021 with 47% intending to stay in this type of accommodation. Small hotels are likely to be used by 44%, guesthouses/B&Bs by

33% and large hotels by 30% - and all other types of accommodation by less than 15% in each case.

- Underlying these percentages there are shifts in accommodation preferences compared with pre-COVID. **Self-catering in particular now has much greater appeal (+25% swing) as do campervans (+11%).**
- In terms of activities undertaken on holidays, **33% of Scots are more likely to consider visiting the natural outdoors on a Scottish holiday post-COVID-19, and a similar percentage are more likely to seek rest and relaxation. More active pursuits such as walking and cycling are also more popular with +26% appeal.** In contrast indoor activities such as visits to arts and cultural venues and shopping for gifts and souvenirs will still have reduced appeal.
- Considering Scottish community attitudes to the re-opening of tourism, although a degree of reticence remains (23% would at most only want small numbers of visitors), **compared to 2020 there is a more relaxed attitude towards visitors generally with almost half (48%) of the population feeling comfortable and ready to welcome visitors.**
- The relative appeal of a 'staycation' in Scotland in 2021 is clear with Countryside and seaside/coast topping the list as can be seen in the table below:

TOURISM DESIRABILITY SCORE

In Summary.....the relative appeal of a staycation in Scotland in 2021 is clear, relative to the lower levels of interest in trips to other parts of the UK or overseas.



Scottish Tourism Index – Wave 5: March 2021

Representative Survey of Scots Adults, 11th-14th March 2021; n=513



[Source: 56 Degree Insights]

This survey clearly points to some important changes in consumer behaviour of Scottish residents in terms of 'staycations' and indicates continued issues with consumer confidence and uncertainty. These trends of Scots and British visitors rediscovering what is on their own doorstep, linked to existing strengths as a domestic tourism destination, with strong destination assets of accessibility, beautiful coast and countryside, and access to nature for relaxation and recreation represents a great opportunity for the Coastal North Carrick Communities and South Ayrshire in 2021 and Nevertheless, based on historic data, several observations can be made with a high degree of confidence about the future market for North Carrick, including that – without substantial intervention and even with the continuing hiatus in international travel caused by the pandemic – the market will remain primarily local

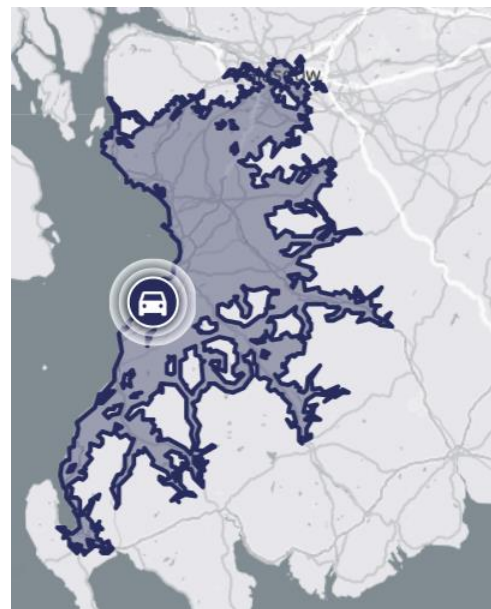
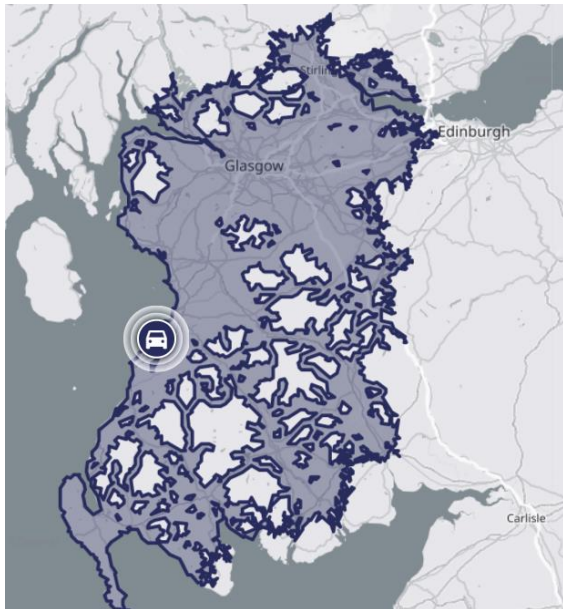
from a 30-90 minute drive time radius and that most are day trippers spending only a nominal amount.

4.3 Drive Time (Visitor Catchment)

The following maps show the geographic markets in terms of drive time from Dunure.

90 minutes (c.2.8m resident pop.)

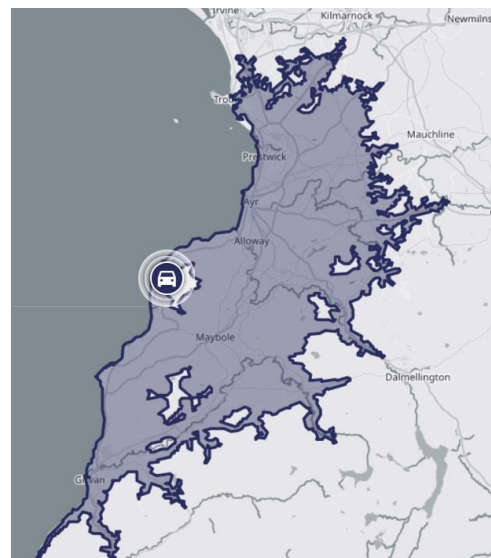
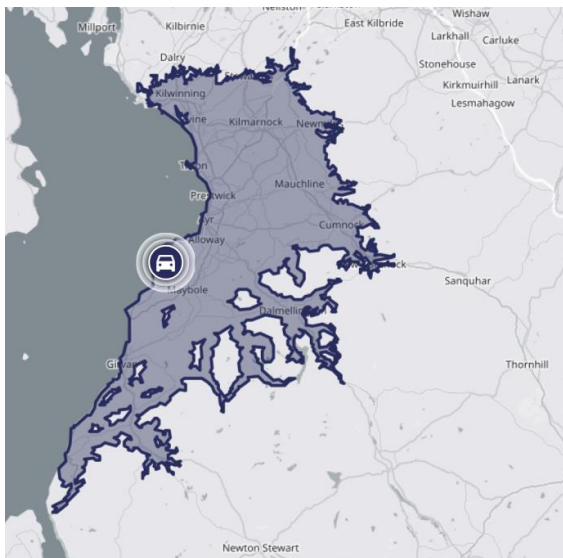
60 minutes (c.2.0m resident pop.)



The 90 minutes radius includes the whole of Glasgow and, with a fair wind, reaches the western outskirts of Edinburgh, along with all the seaports for Northern Ireland, which remains a potential market for North Carrick. The 60 minutes radius includes most of Glasgow and Ayrshire.

45 minutes (c.400k resident pop.)

30 minutes (c.120k resident pop.)

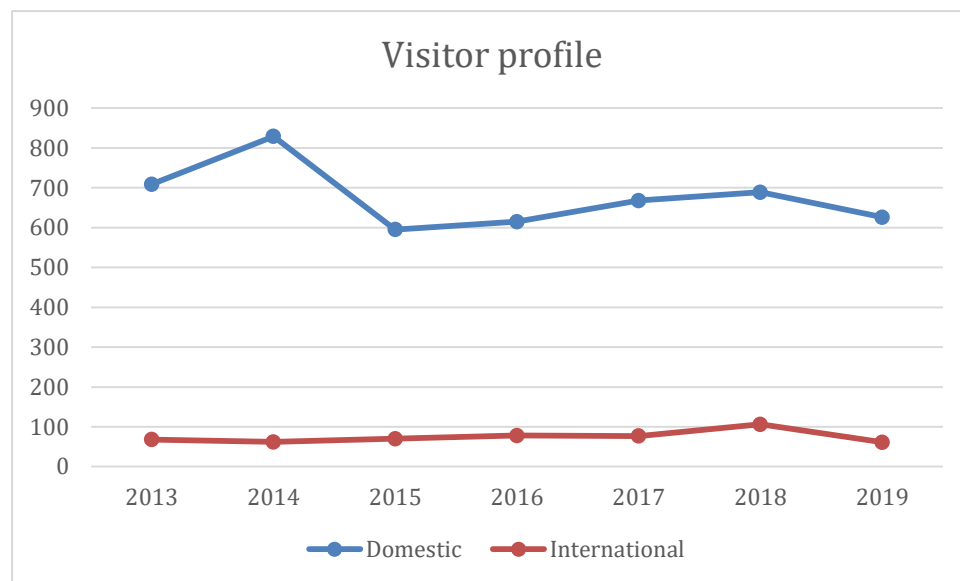


The 45 minutes radius covers most of Ayrshire, including Ardrossan (for the ferry to Arran), whilst the 30 minutes radius is limited to a relatively small area of South Ayrshire.

4.4 Visitor Profile

The grouping together of Ayrshire and Arran visitor data makes it challenging to make the differentiation between visitor figures and profile between visitors to Arran which has its own particular market appeal and that for Ayrshire. More fine-grained data for Ayrshire and South Ayrshire in particular would be helpful for future planning and development and communication with potential visitors.

Taking visitor data together for Ayrshire and Arran, 90% has been domestic, and the profile was fairly consistent pre-COVID.

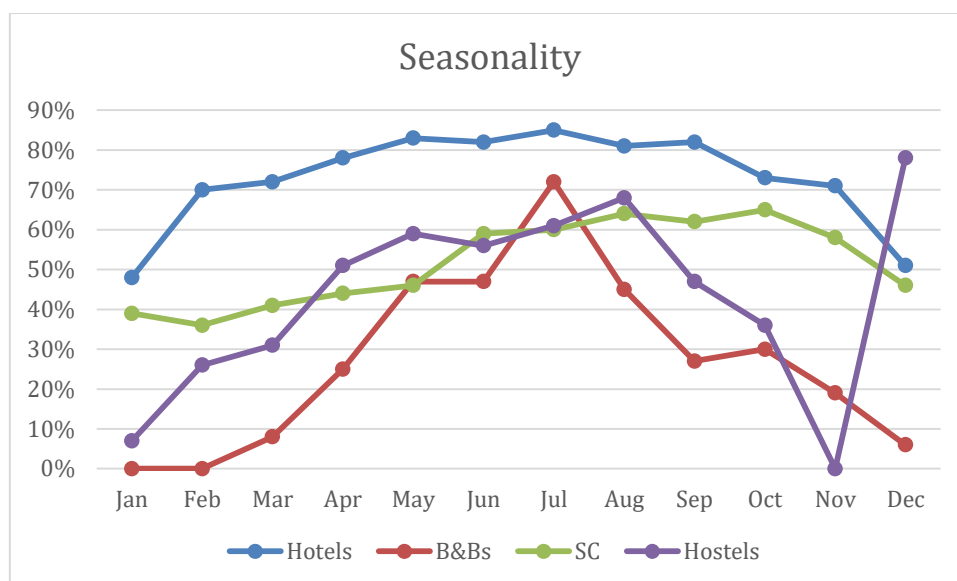


These data are consistent with those reported by National Trust for Scotland (NTS) for Culzean Castle, which is a good proxy for the North Carrick visitor profile. For the more recent pre-COVID year (2019-20), NTS reported 403,245 visitors, who spent an average of 3.5 hours (218 minutes) on site. Of these, 71% were female and 86% were domestic. Of the overseas visitors, the three largest markets accounted for 60% of the total:

- United States 26.7%
- Germany 20.0%
- Australia 13.3%

Following Brexit, it is likely that the German (and other EU markets) will falter, whilst the Anglophone markets of North America (US, Canada) and Australasia (Australia, NZ) will gradually recover, and this is where Bruce Country could have an important role, especially in 2024, which – as well as being the 750th Anniversary of the birth of Robert the Bruce – is expected to be VisitScotland's next *Year of Homecoming*.

Seasonal occupancy varies widely across accommodation categories. Considering the high number of B&Bs in North Carrick, there is a clear need to develop product that will attract more visitors outside the Summer season. [The high occupancy for hostels over Hogmanay is solely an Arran phenomenon.] Self-catering is a highly significant category for North Carrick, as this includes all the static caravans and growing number of motorhome visits, which are a feature of the North Carrick landscape.



Some of the most significant data relate to visitor spend and average duration. The following table uses data for 2019, but the profile was broadly consistent pre-COVID.

	Average duration		Average spend per person per day	
	Ayrshire & Arran	Scotland	Ayrshire & Arran	Scotland
Domestic	3.6	3.4	£54	£69
International	6.3	7.9	£62	£93

This shows that international visitors are more than twice as valuable as domestic visitors, because they stay longer (6.3 vs. 3.6) and spend more (£62 vs. £54). But, perhaps even more significantly, visitors to Ayrshire and Arran spend roughly a third less than the Scottish average, which reflects the lack of spending opportunities for visitors. Unless there's more revenue generating product, tourism will contribute little to the destination community.

Usefully, however, VisitScotland has reported at local authority level for day trippers.

	Visits	Spend	Average spend
Scotland	140.8m	£5,749m	£41
Arran & Ayrshire	10.4m	£415m	£40
East Ayrshire	1.6m	£36m	£23
North Ayrshire	2.9m	£95m	£33

South Ayrshire	5.9m	£284m	£48
----------------	------	-------	-----

The implication is that many visitors are spending money on a round of golf and a quick meal, but the contribution would be transformed if visitors could be encouraged to stay overnight and had more opportunities to spend money on local food and local retail.

The most recent report from VisitScotland published in January 2021 for Ayrshire & Arran shows that the visitor profile to the area is characterised by domestic tourism with c.9 out of 10 visitors and generated circa £190 million to the local economy:

“The vast majority of trips to the region were undertaken by British travellers – 89% of all trips in 2017-19 – driven by Scottish Residents [55% Scottish residents/ 34% rUK] – were sufficient to offset a 7% drop in international travellers. At 10.4 million per year, domestic day trips in Ayrshire and Arran declined by 2%, mirroring a similar drop observed on a national level. However, day trip spend increased by 7% to reach £415 million annually, thus producing net growth in tourism expenditure.

Between 2017 and 2019, visitors made nearly 750,000 overnights trips per year to Ayrshire and Arran, spending 3 million nights annually in the region. Overnight tourism expenditure was £189 million per year on average, a 10% drop from 2016-2018 which resulted from decreases in both domestic and international spend.”

[Source: VisitScotland Ayrshire & Arran Factsheet 2019 (published January 2021)]

4.5 Visitor Attractions and Visitor Numbers

Culzean Castle and Country Park operated by the National Trust for Scotland is the biggest paid visitor attraction in South Ayrshire and in a ‘normal’ year attracts over 330,000 paid visitors.

Culzean Castle and Country Park Visitors

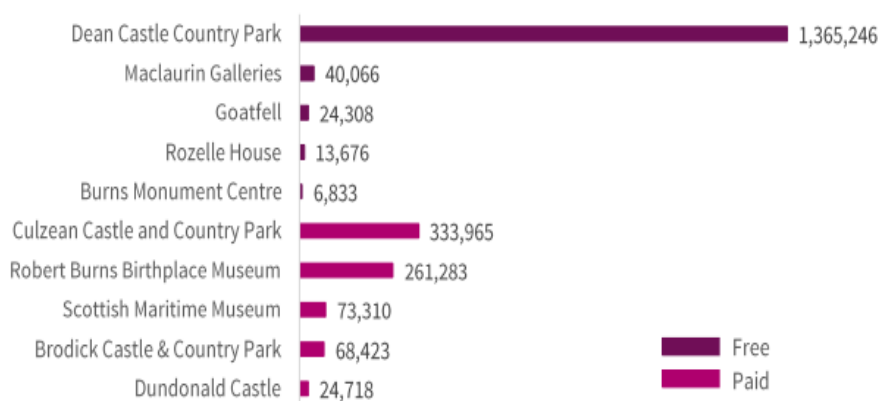
	2018-19	2019-20	2020-21
Total	408,567	403,245	114,746
Paying	80,593	75,134	21,101
Member	123,132	103,823	47,396
NT Members	56,754	54,035	19,962
Other Free	138,267	166,505	25,980
Countryside	9,656	16	

[Source: National Trust for Scotland March 2021]

A high percentage of NTS members live in Ayrshire and the access this gives to Culzean Country Park is an identified reason for this. A visit to the Country Park as opposed to the Castle is obviously the strongest component of the visitor experience. The NTS estimates that there could be up to circa 70,000 people walking into the park from the Maidens every year. The 2020 visitor survey undertaken at Culzean showed quite a different profile of visitors with a big increase in family visitors using the park for access to the countryside.

Visitor figures for other Ayrshire & Arran visitor attractions are presented in this table from VisitScotland:

Top Five Free and Paid Visitor Attractions in Ayrshire & Arran (with Visitor Numbers), 2019



Source: Moffat Centre Visitor Attraction Monitor, Glasgow Caledonian University, 2019.
VAM is solely owned and distributed by Glasgow Caledonian University Moffat Centre. If you are interested in participating in the accompanying survey or subscribing to the publication, please contact info@moffatcentre.com.

The Heads of Ayr Farm Park which is close to Dunure also attracted approximately 180,000 visitors in 2018, while Burns Birthplace Museum in Alloway attracted 261,283 visitors in 2019 [Source: ALVA].

Overall these visitor figures for paid visitor attractions in the area demonstrate the potential to draw visitors in to the area. Also where the experience has strong market appeal to convert visitors in to paid visitors to attractions.

Establishing the current numbers to Kirkoswald, Maidens and Turnberry and Dunure is challenging as there are not significant sources of visitor data and monitoring of the volume of visitors in the communities. Surprisingly NatureScot for example collect no data such as foot path use counts for those visiting key countryside locations in the North Carrick area.

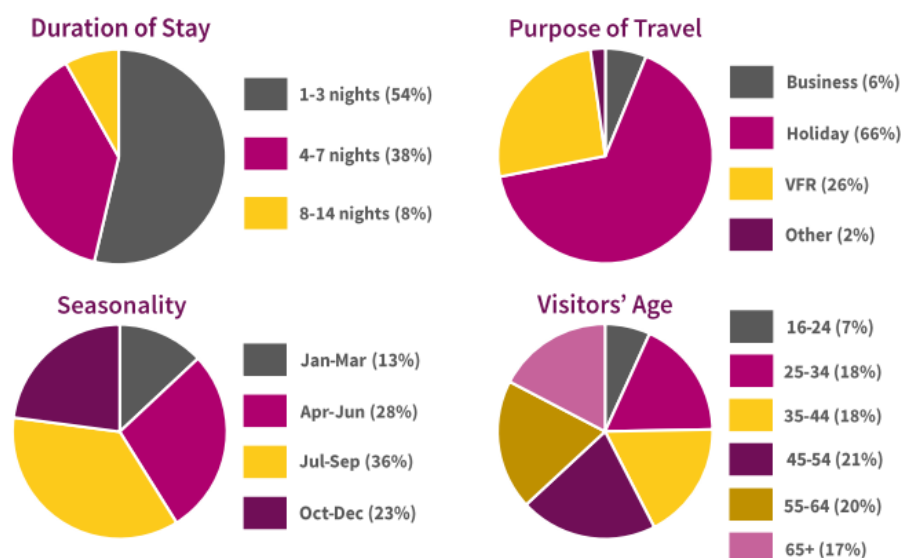
Figures collected at the charged for Kennedy Park car park indicate that in 2019-20 the total amount of vehicles was 4,103. The weather has a significant impact on visitors to Dunure for example on the Easter weekend in 2018 which had bad weather there were 131 vehicles using the car park, whereas in Easter 2019 which had very good weather there were 770 vehicles recorded. Those using the car park tend to be long stay. The income from the car park typically circa £11,000 per annum is important to cross subsidise the operational costs of the Kennedy Hall and the public toilets. To help assess the potential future car parking needs in Dunure, especially in relation to future development plans, it is recommended that systematic recording of car parking usage, and monitoring of on street parking in the village.

In Maidens there is no charge for the car parks in the village and there is larger capacity than that available in Dunure. Again those using the main beach front car park tend to be long stay. There is generally only informal monitoring of the number of cars parking in the different car parks, and when this is at capacity and parking is taking place in other places in the village. Anecdotally on peak days there are issues with demand for parking in Maidens and nearby Turnberry (where parking is limited) exceeding available spaces with vehicles parking at the roadside and the road verges. Active, regular and consistent monitoring of car

parking in the communities will be useful evidence for future advocacy purposes in putting the case for car parking improvements in the settlements.

4.6 Visitor Characteristics

Other aspects of the visitor characteristics to South Ayrshire which are important include the reason for visit and time of year of visits, the profile of visitors, and the activities undertaken on a visit. These tables taken from the VisitScotland Ayrshire and Arran Factsheet represent an historic snapshot:



Source: IPS. All charts are based on 3-year average data (2017-2019).
Figures may not sum up due to rounding.

Short breaks in the main April to September period are a key characteristic but there is an opportunity to draw more visitors in the quieter months of the year.

Most Popular Activities Undertaken as Part of a Day Trip, Ayrshire & Arran: 2016-18 Average Annual Figures (Number of Day Trips in Millions)



The most popular activities show the importance of the food and beverage offer and also the popularity of a visit to the beach and low level walks and sightseeing.

4.7 Scottish Tourism Trends

Another important piece of research VisitScotland's Insight Department: *Trends 2020 Travelling towards transformational tourism* (February 2020). Key findings in this report which are of relevance to the Coastal North Carrick Communities are:

The importance of **'Transformational Tourism'** described as a movement amongst consumers to travel with purpose and cause - maximising their time, giving something back to the destination they visit and consciously off-setting the impact of their travel. Driven by the mainstreaming of wellness, betterment and mindfulness visitors want their trips to have meaning, challenge, connection and impact. These visitors have increased environmental awareness of the impact of travel and seek out the sustainable credentials of destinations they visit and the offset the impacts of their travel through volunteering for example. For South Ayrshire and our communities there are opportunities to create a visitor experience that is aligned to the characteristics of Transformative Tourism. The trends report goes on to say that 'The future of tourism is ensuring that visitors receive the transformation they seek while understanding the needs of the environment. For the North Carrick Coastal communities projects linked to transformational tourism may revolve around volunteering by visitors to share skills and expertise supporting community projects and enhancing the visitor experience.

Other pertinent 'Mega Drivers to 2030' identified by VisitScotland's insights department are **'Environmental Sustainability'** which is recognised as having profound effects on consumer behaviours linked to the global climate emergency. Travellers in 2020 are looking for smart ways to reduce their carbon footprint. With destinations that demonstrate their green credentials are increasing in popularity. For the our communities in this study having a strong green ethos in terms of adopting energy efficient design principles and promoting green and active travel for example will be an important objective. South Ayrshire linked to initiatives like the UNESCO Galloway and South Ayrshire Biosphere and South Ayrshire Council's green and active travel initiatives offers the opportunity to develop exemplar pilot sustainable tourism projects.

'Technological Adaptation' the hyper connectivity digital first and fast will be the business model for the future. Impacting on consumer expectations for personalisation, convenience, immediacy and information will be met by enterprises embracing the digital revolution breaking barriers to entry and engaging directly with their customers. In the past year as a result of the disruptive nature of COVID -19 we have seen an acceleration of this trend. For the communities of coastal North Carrick they need to ensure that the opportunities associated with the digital economy are fully maximised and capitalised upon working with key partners such as South Ayrshire Council, Scottish Enterprise, University of West of Scotland, Traveltech for Scotland. Interface funding facilitates research collaborations between academia and tourism providers and may be worth exploring to develop project ideas in this context. The digital economy is a key theme of the Ayrshire Growth Deal too.

'Growing global urbanisation' (three fifths of the world's population will live in urban Areas by 2030) as a trend creates opportunities for destinations that can provide a balance of rural, urban, the unique and authentic, that provide an alternate to what maybe to some a generic urban existence will develop in parallel to the ongoing expansion of this global urbanisation. The COVID-19 Pandemic has strengthened the appeal of rural areas for urban dwellers as a chance to reconnect with nature and to strengthen wellness and well-being.

The development of proactive destination management is also identified as a strong trend. Where there is proactive intervention in addressing seasonality and regionality to deliver the benefits of tourism through a balanced economy, society, culture and environment. These themes of responsible and sustainable tourism are a strong aspect of the national Tourism

strategy 'Scotland Outlook 2030', and have been heightened in importance as a result of the impacts of the COVID-19 pandemic. The need for proactivity in destination management is reflected in the Development Plans for KMT and Dunure & Fisherton and should be a guiding ethos as planning is progressed in to action. This proactivity by the community should be followed through with engagement with the 'Destination Ayrshire' initiative to ensure new tourism products and visitor experiences are fed in to the packaging of visitor experiences and promotion of the wider Ayrshire destination.

'Unpredictability and the unknown' were identified as a trend, the implications of 'black swan events', and this could have been written in the context of the global health pandemic that then struck in March 2020. For destinations this translates in to a need for resilience and flexibility and adeptness in dealing with change.

Finally in the VisitScotland trends report given 2020 was the designated Year of Coasts and Waters there was consideration of 'Trends 2020 Water-Ways' :

Scotland's coasts and waters have shaped our culture, our history and our way of life for thousands of years, from our stunning beaches and coastlines to our inland waterfalls, lochs, and rivers, Scotland's bountiful supply of water has supported our farming and fishing industries, contributed to our industrial heritage by powering canals and mills, and continues to provide a critical ingredient for our whisky making.

Given the nature of Scotland's coastline and the types of businesses operating in these areas, it is perhaps not surprising that the majority of trips (67%) made to our seaside and coastal locations by GB residents taking overnight trips are purely for leisure purposes compared with 56% of trips to Scotland as a whole. Indeed the recreational asset value of coastal regions, lochs & reservoirs and rivers and canals to Scotland's economy is calculated at £11.3billion.

In the context of the anticipated year of Coast and Waters in 2020 the report stated that they expected to see a wave of aquatic interests in tourism related to seas, lochs, rivers and canals. The ongoing interest by travellers around the theme of aquatic interest in tourism related to seas, lochs, rivers and canals. The ongoing interest by travellers around the theme of routes extends to our waterways. Scotland has over 11,000 miles of coastline, 137 miles of canals, 31,460 freshwater lochs and several navigable rivers, alongside the 118 inhabited islands. Innovative products have developed recently which harness this valuable and accessible resource.

The opportunities for building on this particular trend are significant for the Coastal North Carrick communities given the potential to maximise the natural asset of the spectacular coastline and build on existing strengths relating to water based recreational 'adventure tourism' and sporting activity, supported by events such as Dunure's 'Festival of the Sea'. Making more of Ayrshire's Coast and waters is an important aspect of the Ayrshire Growth Deal strategy too. It also features in the Borders Growth Deal with plans for Loch Ryan as a key centre for water based recreational activity. This is why maximising the opportunities of this asset and the rich maritime heritage is identified as a significant opportunity for one of the main recommendations in this report.

5 PROJECT PROPOSALS AND PRIORITIES

A summary action plan is set out in section 6.

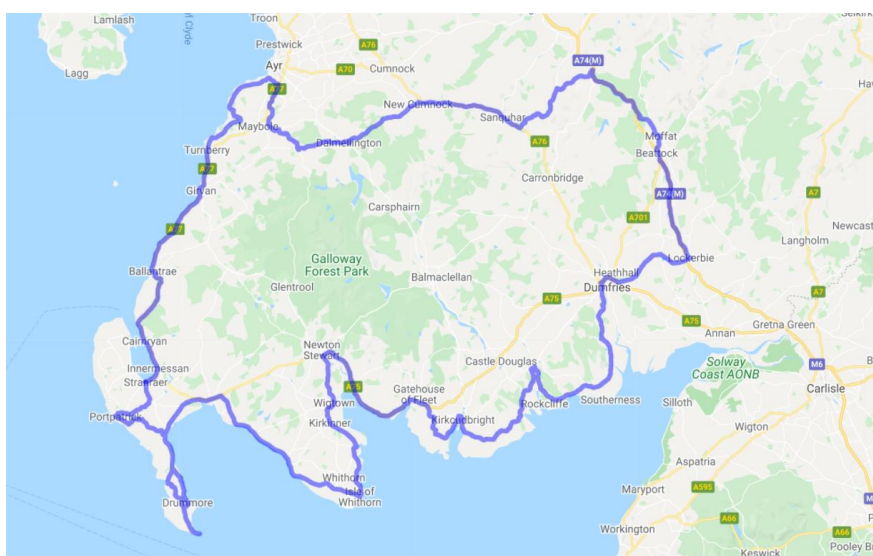
5.1 Identifying and taking forward priority projects

The focus of this piece of work is to review, with regards to the community impacts, the market dynamics and shifts in consumer behaviours created by the COVID-19 coronavirus Pandemic, the existing development programmes and action plans produced by Dunure and Fisherton (2019) and Kirkoswald, Maidens and Turnberry (2020) and to consider project priorities and also ways to enhance the visitor management across both communities. In pulling together this report it is clear that these communities have significant community and destination assets, that there is an ambition to enhance the quality of life for residents and the experience for visitors, that there is proper stewardship, care and maintenance of the natural assets, and to enhance opportunities for adding value to the local economy and jobs to ensure the future vibrancy of the communities.

These communities are popular with visitors and COVID-19 has resulted in a re-discovery of the appeal of the area for many. In response to this popularity, it is understood that there needs to be proactive management, to ensure balance and harmony between the resident and visitor interests, while at the same time to maximise the benefits to the communities and minimise the negative impacts that visitors can bring.

From engagement with local stakeholders it is clear that there are issues in particular around for example ‘housekeeping’ matters such as roads infrastructure standards, care and maintenance of public space, public toilets and litter control, but that there is also a recognition of the need for continued and new investment in community facilities and infrastructure to ensure the area is known as a high quality, welcoming and desirable place to visit. The community will work in partnership with South Ayrshire Council to ensure that the correct levels of ‘housekeeping’ are undertaken and will play their part in achieving this objective where appropriate but will also hold the Council to account where it is failing to deliver on its responsibilities.

It has been clear that these communities do not function in isolation and that they fit within and have an important part to play in the future development of the wider destination and visitor experience of Ayrshire and Southwest Scotland.



Source: <https://www.visitsouthwestscotland.com/attractions/swc300map/>

Initiatives such as the SWC300 long distance road route, the growth of Loch Ryan as a water-sports centre, Cairnryan's continued role as a major ferry terminal and important sea connection to and from Northern Ireland (and the Republic), further investment in transport infrastructure in the South West, the UNESCO Galloway and South Ayrshire Biosphere, the Galloway Forest (and Dark Skies) Park, the Borderlands Inclusive Growth Deal, and the potential for a new South West of Scotland National Park are all important factors for the future development of tourism in the coastal North Carrick communities.

As are tourism developments linked to making the most of Ayrshire's maritime heritage, coast and waters; future developments at Prestwick Airport; travel technology and the digital economy as part of the Ayrshire Growth Deal; leisure and retail investment and redevelopment in Ayr, work of the Ayrshire Tourism Recovery Group chaired by Malcolm Roughhead Chief Executive of VisitScotland and the creation of a new tourism partnership 'Destination Ayrshire'; Ayrshire Food Initiative and important events like the Open Championship taking place at Royal Troon golf course in 2024.

In marketing and promotion terms there are rich themes and stories to develop across South Ayrshire that link these communities such as the fishing, maritime and farming heritage, the Robert Burns connection, the story of King Robert the Bruce (all the more important due to the 750th anniversary on 11 July 2024 of his birth at Turnberry Castle), the Clan Kennedy, and adventure tourism (walking, cycling, sailing, sea kayaking, coasteering etc.), and transformative tourism connecting visitors to nature and the landscape and wellbeing tourism. The task in hand is to develop with the communities of South Ayrshire the important narrative and themes, with consistent visualisation and branding and compelling itineraries.

There is a clear focus by these two community development groups in their ambitions for their communities to be vibrant and attractive places to live, work and visit, and to play their part as key destinations within South Ayrshire. Also to play a key part in advancing Destination Ayrshire's ambitions to enhance the appeal and awareness of this part of Scotland and to maximise the economic, social and cultural benefits of tourism to the area.

While in this report we focus on these coastal communities there is also recognition of a mutual dependency with other adjacent communities such as Ayr, Maybole, Girvan, and North Carrick's hinterland for transport links, support services, amenity, work force, and a diverse and high quality visitor experience. Proposed investment and regeneration in these communities will help the communities in coastal North Carrick due to mutual dependency (*'a rising tide will raise all the boats in the harbour'*).

One of the major developments taking place in the area is the A77 Maybole bypass due to open before the end of 2021 and investment in the streetscape in Maybole. It is anticipated that the bypass will result in the regeneration and renaissance of Maybole. This will create new development opportunities in the community with benefits to the wider South Ayrshire area. Maybole will be developed as a local service and transport hub linked to the railway station, and will draw visitors to the area through investment in the Castle and Town Hall, the restoration of key buildings, and streetscape improvements. The connecting path network to Dunure and KMT and cycle routes creates opportunities to strengthen the links between communities. The A77 improvements will also improve the accessibility for KMT from Ayr and points north and south.

Kirkoswald sitting on the A77 has a different profile as a visitor destination based on the food and beverage and retail opportunities created from its accessibility and the through traffic. It acts as a local service hub in a way that Turnberry and Maidens do not. Public toilet provision and improved play equipment are identified actions in the development plan. Good 'housekeeping' of public spaces in the village as per the other communities is important. The

new Cook School (a social enterprise) is a good case study example of collaboration and new product development that will benefit the community and visitors alike.

It is worth noting that there is a community tourism development project also running in Girvan which will also be cognisant of its relationship and role with neighbouring communities. It is anticipated that the Girvan Development and Action Plan will be published by the end of May 2021. It is important to ensure continued active engagement and collaboration between the communities given Girvan's role as a transport hub, and local services centre. Given the importance of the A77 specific development opportunities may arise for food and beverage provision and potential linked developments such as farm shops and restaurants, and also new accommodation opportunities linked for example to agritourism and farm diversification with self-catering accommodation, glamping and food based experiences. There are more opportunities to cross sell between different elements of the visitor experience to ensure visitors are aware of the extent and diversity of the visitor experience and that it is easily accessible through packaging of the product. Skills and training of those working in the industry to ensure this cross selling and a good welcome for visitors is important, utilisation of the 'Ayrshire smiles service excellence' concierge training project for front line staff to raise awareness is an option.

A primary objective identified by stakeholders is to realise greater value added from visitors to the area primarily through extending the length of stay and converting visits to overnight stays, and to flatten out seasonality by encouraging more visits out with the main season of April to September. It is also recognised that there is a finite carrying capacity in the coastal communities and that balanced and appropriate development that are in keeping with the character of the place needs to be realised. It will be important to link into skills development initiatives for those seeking employment.

Across Coastal North Carrick there is a gap in real time intelligence on the volumes of visitors, who is visiting the area, why, what activities they are undertaking, and what are the satisfaction levels amongst visitors with the visitor experience. An ask by the community from VisitScotland, South Ayrshire Council, Destination Ayrshire and other partners (for example Nature Scot and the National Trust for Scotland) needs to be support in gathering these insights to assist with advocacy and evidence building for future investment in new facilities, infrastructure, experiences and marketing. Such intelligence and insight will enable direct communication with visitors, personalisation of the message and the experience, and the identification of future opportunities, and for evidencing impacts. The digital economy, the scraping of 'big data' and analysis of web traffic and social media makes such real time analysis a more realistic proposition now.

5.2 Review of Existing Development Plans

a) 'Development Programme 2019 -2024: Dunure the jewel on the South Ayrshire Coast'

The current development plan was published in 2019 and the Action Plan included seven development priorities:

- 1. Increasing use of outdoor space, activities, making use of the waterfront*
- 2. Improving the look of the village, particularly the harbour*
- 3. Developing and improving the facilities in Kennedy Park*
- 4. Establishing more clubs, festivals and community events*

5. Improving Fisherton Primary school, extending and 'greening' the playground

6. Making our roads safer

7. Developing Dunure as a Tourism Destination – establishing Dunure as a main tourist destination within South Ayrshire by improving and promoting our assets including Dunure Castle, Kennedy Park, the Harbour and Seafront

The plan in 2019 was costed at circa £1.3 million of projects, and is being driven forward by the "Dunure Working Group" made up of representatives of the Community Council, Hall & Park Association, Harbour Committee, Parents' Council, and the Youth Group. It is chaired by a local Councillor, and continues to be advised by the NCCBC Development Officer and Council Officers. Undoubtedly the COVID-19 coronavirus pandemic has delayed the work of the Working Group but the focus and intent of the group has not been diminished. Improvements in the public toilets, paths, local road and footpath signage have been taken forward and plans are progressing to enhance pedestrian accessibility and local infrastructure.

This review in engaging with local stakeholders has reaffirmed the importance of the current focus of the development and associated action plan. Based on the impacts of the pandemic the focus on improving the car parking provision and local access infrastructure, and the importance of advancing **a masterplan for the heritage of Dunure** that ensures the preservation of key heritage assets like the harbour and light tower, castle, doocot and Kennedy park while at the same time enhancing safety and security, accessibility, improved lighting of the historic features (to enhance security and after darkness night time presence), enhanced interpretation, local amenity, maintenance of public spaces ('housekeeping') and enhances the quality of the visitor experience is important. Ensuring that car parking pressures, management of camping, parking by motorcaravans and keeping on top of litter and any anti-social behaviour is important.

The closure of the Dunure Inn and a lack of places for visitors to buy food and drink and the lack of wet weather facilities remains an issue. Through investment in the public spaces and infrastructure in the village hopefully there will be growing confidence for private entrepreneurs to fill this gap, perhaps with the likes of 'food trucks' to test and build the market. Plans for the 'heritage centre' importantly include food and beverage operations.

There are opportunities to build on the awareness of the location as an 'Outlander' location, to develop the annual 'Festival of the Sea' and other events to bring the community together and to raise the profile of the village. The Ayrshire Coastal Path represents an under-utilised resource to attract visitors and to link the coastal communities from Ayr to Girvan. The development of the harbour and the access it offers to the coastal waters for adventure activities for example sea kayaking, coasteering, sea rowing, paddle boarding and sea fishing are a real opportunity. As are events linked to these activities.

The aspirations to develop a 'heritage centre' as part of a masterplan for the heritage of Dunure represents a potential step change project for the village to protect the heritage assets, to create a much needed wet weather facility, and the chance to present the stories of the village associated with its fishing heritage and stories linked Castle Kennedy and to create a multi-purpose exhibition and function space. The Dundonald Castle Visitor Centre in North Ayrshire represents a model of what could be achieved. The aspiration is to enhance local amenity for residents, to enhance the visitor experience and hold visitors longer in the village, to generate added value from visitors, to create local employment opportunities, and enhance 'pride in place' in the community.

Events infrastructure, enhanced play equipment, and quality public toilets are part of the aspirations for this facility and Kennedy park. Dunure and the stunning scenery attracts artists and photographers, and the heritage centre could act as a focal point for this. Other ideas being explored for Kennedy Park are the introduction of some 'informal' motorcaravan pitches which could provide needed local infrastructure and income generating opportunities. South Ayrshire Council is operating pilot 'Aire' (informal pitches and facilities) for motorcaravans. in Ayr and Girvan in the summer of 2021 and these will provide useful insights for Dunure. There needs to be a proactive approach to destination management in the village to ensure that the quality of the visitor experience is enhanced and maintained and the community have a key role to play in this.

Looking further ahead consideration needs to be given to environmentally friendly public transport access along the coastal A719 route to encourage active travel in the area and support the use of the coastal path for long distance walking for example. Exploration of access and parking challenges and pressures need to be explored including additional seasonal parking away from the Kennedy Park and Harbour, especially in the context of the potential development of the heritage centre.

Dunure needs to ensure that it grows its digital presence working in collaboration with South Ayrshire Council on the Destination Ayrshire initiative, through the COIG and SWC300 to raise awareness and profile of the village and its distinctive visitor experience, it needs to feature large in the narrative around things to see and do in South Ayrshire, in promotional campaigns and visitor itineraries. Events will act as an important tool in building destination awareness. There are opportunities to enhance the reach to and communication with consumers and access to visitor services information through the use of Destination Ayrshire apps and websites access. Enhancement of the presentation and interpretation of Dunure's rich heritage and stories can be enhanced in a cost effective and accessible way with the use of technology utilising for example augmented reality.

b) *Kirkoswald, Maidens and Turnberry Development Plan 2021 -2024*

The current development has as its main priorities: More activities for families and young people and more community initiatives and events; Protect and enhance the natural environment with an emphasis on wildlife, habitats and scenic views; better marketing of the area and its businesses, disabled access improvements, increased traffic safety, road and public space improvements; making the most of the local area including existing and new facilities.

Based on the development plan, the experiences of the past year as a result of the COVID-19 coronavirus pandemic, and in consultation with the local community as part of this report key priorities of the development plan remain valid and include: protecting and enhancing the natural environment; enhancing disabled access (the new coastal footpath is welcome in this respect and should be considered a catalyst for similar investment); traffic safety and public space improvements (new 20 mph zones in South Ayrshire villages will help with this); provision of adequate public toilets especially at the north end of the beach; and advancing new facilities and enhancements to create more wet weather facilities and activities for families and young people. The aspirations for a community hub based on the bowling club continue to be progressed as are plans to enhance the facilities at the harbour.

Opportunities exist around the development of the water sports activities around the harbour, linked to the potential to make it a centre for the provision of water craft and safety skills linked to sailing, sea kayaking and the responsible use of jet skis. Events linked to water sports, sea craft and maritime heritage are worth exploring further. The issue of anti-social and potentially dangerous jet ski use needs to be addressed within the constraints of marine

legislation and local bylaws, encouragement of adoption of a code of conduct and a zoned jet ski area at Maidens is an option.

Maidens and Turnberry are well placed in having key pieces of existing visitor infrastructure and attractions including Culzean Castle and Country Park, Trump Turnberry Resort and the destination restaurant Wildings. It also has a distinctive profile and characteristic of privately owned mobile homes in a number of local sites, which have a loyal and long stay population of users from across West Central Scotland.

There is an opportunity for more proactive collaboration between the community and the National Trust for Scotland to ensure more cross over, and to work more closely on events and ensuring extended length of stay. Over the past year Culzean has seen a growth in the family market which is significant for the area. The residential environmental education centre at Culzean operated by the Ayrshire schools represents an opportunity to link to transformative tourism and volunteering linked to environmental education and conservation. The NTS has land holding on Croy Beach which to date has not been fully developed. The NTS at Culzean is investing in more high quality self-catering and has identified a growth in multi-generational tourism.

New eco glamping pods in the area are also benefiting the growth of the short stay market by widening the diversity of the accommodation offer.

Turnberry Resort is more than just a golf resort and over recent years has witnessed a market shift to a domestic short break non-golf market, which creates opportunities for the local communities. There are also opportunities linked to incentive travel when this recovers. Both Culzean and Turnberry Resort have a significant weddings market, whilst the local community can capture a greater share of this market by developing assets, such as Dunure Castle as a wedding venue, supported by both wet and dry options for receptions in and around Kennedy Park. There is a high end luxury travel market in the area supported by Turnberry Resort, Glen App Castle Hotel and Blairquhan Castle and these visitors are looking for high end visitor experiences in the area including adventure activities.

Key local landowners such as the Cassillis and Culzean Estate are monitoring impacts of countryside access and keeping under review remedial interventions to address environmental pressures and degradation. The stabilisation of Turnberry Castle and impacts of access to the site are being assessed, and there is a particular urgency for progress, considering the forthcoming Bruce anniversaries in 2024 (birth) and 2029 (death). Future development opportunities are also being kept under review.

The local connection with the heritage and history associated with King Robert the Bruce and the Earls of Carrick and local associations with Turnberry and South Ayrshire are a strong element of the character of the place. The 750th anniversary of his birth in 2024 and 700th anniversary of his death in 2029 are both a potential focus for events and enhanced interpretation to tell more of the local story. The idea of a statue commemorating the 'Lion of Alba' has been mooted, as has more local interpretation featuring the local connections with 'Robert the Bruce'.

5.3 Public Toilet Provision



[Source: Healthmatic.com]

In the preparation of this report there was clear feedback from stakeholders that ensuring high levels of ‘housekeeping’ in their communities was of the highest importance. With issues around the provision of high quality, well maintained, year round and accessible public toilets being a key part of necessary housekeeping in each settlement. The impacts of the COVID-19 Pandemic have put a spotlight across Scotland on the reduction on public toilet provision across the country. While locally some provision has been made by the council working with local businesses to ensure access to their toilets, as ‘public’ facilities the closure of these businesses as a result of COVID-19 restrictions, and restrictions on access, at a time when people have continued to visit has created problems. For Maidens and Kirkoswald where the public toilets were closed some time ago this lack of ‘free-standing’ facilities is especially important. It is understood that in Kirkoswald there have been discussions with NCCBC about potential sites for a new public toilet.

The British Public Toilet Association [BTA] <http://www.btalooos.co.uk/> is a Not-for-Profit Members Organisation that is working to promote the highest possible standards of hygiene and provision in all “away from home” toilet facilities across the United Kingdom. The BTA has identified a number of reasons why there is currently a national need for more and better toilets.

The BTA believe that: *‘there are an increasing number of specialist user groups, whose lives are affected by the state of Britain’s public toilets. These include people with mental or physical disabilities and their carers; the infirm or elderly; people with babies or young children and people of all ages who are coping with a range of medical conditions:.*

- *Britain’s population has an increasingly significant ‘ageing’ profile*
- *Residents travel more within the country, and the number of visitors to Britain increases each year, placing added pressure on our existing toilet facilities*
- *Public health and hygiene, as well as environmental issues, are constantly in the news, with increasing media interest in all matters relating to public toilets*
- *Public toilets are the ‘shop window’ for any area or establishment – where first and lasting impressions of levels of customer care are made.’*

Currently there is no mandatory requirement for local authorities to provide public toilets. However as we have seen as a result of the COVID-19 coronavirus pandemic when businesses like cafes, restaurants, pubs and shops have been closed due to lockdown restrictions, it has become evident that public toilets are a vital component in creating accessible, sustainable and comfortable places for all.

Over recent years across Scotland there has been a transfer of assets and responsibility for the operation of public toilets from Local Authorities to Communities. In Dunure the local community operate the public toilets. In Maidens the public toilets which were no longer fit for purpose have been taken away by the Council. For the summer of 2021 temporary

portaloos have been installed in Maidens at the north end of the beach, these are not seen as a long-term solution.

There are a number of options for the permanent solution to public toilets in rural locations like Maidens that are also environmentally sustainable. Local community representatives need to engage actively with South Ayrshire Council to identify a cost effective and sustainable solution.

In addition to the capital cost of sourcing new public toilets there are also the on-going operational costs to consider, especially if the local community is being asked to take on their upkeep. Currently it is estimated by the BTA that it costs around £12,000 to £15,000 per annum to operate and maintain public toilets. It may be that across a number of local communities a single organisation takes on the maintenance contract to realise economies of scale and cost effective upkeep operations. It may be possible to combine such operations with other 'house-keeping' activities across the settlements.

There is also the option of new technology of fully automatic self-cleaning toilets to consider, as well as installing the most environmentally sustainable option in a sensitive location. There are number of suppliers of public toilets identified by the likes of the BTA.



[Source: Healthmatic.com]

Healthmatic Public Toilets https://www.healthmatic.com/wp-content/uploads/2019/04/Healthmatic_Smarter_Public_Toilets_2018.pdf

NatSol: The Remote Toilet Specialists <https://natsol.co.uk/>

Danfo Public Toilets <https://www.danfo.com/en/>

While the organisation Changing Places: http://www.changing-places.org/the_campaign/what_are_changing_places_toilets.aspx offers guidance on the provision of fully disabled accessible toilets. There is an example of a Changing Places accessible toilet in operation in Largs in North Ayrshire.

Forestry and Land Scotland have been experimenting with the introduction of composting toilets with the facilities at Salloch Bay campsite <https://forestryandland.gov.scot/visit/forest-parks/queen-elizabeth-forest-park/salloch> on the West Highland Way in the Loch Lomond and Trossachs National Park being an example of this type of low environmental impact public toilet provision in rural locations.

A local example of community run public toilet facilities can be found on the Isle of Arran <https://www.visitarran.com/sites/default/files/Public%20Toilets%20on%20Arran.pdf>

Recommendation: that the communities in collaboration with the Council progress a feasibility study to address community priorities for the provision of quality, accessible, environmentally sustainable, and appropriate public toilet provision. This study should draw on best practice as per the recommendations of the BTA, and identify the best solution in terms of location, design and type, establish capital costs, on-going maintenance and operational costs, models for future operations including income generation through charging and project delivery and on on-going management options for the facilities. The opportunity exists to develop public toilet provision and operation that will be an exemplar model for rural communities and in sensitive locations.

5.4 Enhancing the quality of the visitor experience through Adventure Tourism

Adventure Tourism especially linked to marine-based activity represents an excellent opportunity for South Ayrshire combining coastal and water based opportunities to be found in the likes of Dunure, Maidens and Turnberry with activities in the countryside and uplands of the Galloway Forest.

The most comprehensive research on 'Adventure Tourism' in Scotland has been undertaken by Highlands & Islands Enterprise (HIE) with their report in 2015 '*Adventure Tourism in Scotland*'. In this report the definition of the Adventure Tourism (AT)] sector, uses the commonly held sector definition as follows:

- Walking/Climbing: mountain walks/treks, long distance trails, rock climbing and mountaineering;
- Cycling/Biking: cycle touring and mountain biking;
- River Activities: canoeing, kayaking, rafting and canyoning;
- Marine Activities: sailing, kayaking, surfing and diving;
- Wildlife/Nature Watching: boat and vehicle excursions and walking; and
- Snow Activities: skiing, snowboarding, ski-touring, snow-shoeing and ice climbing.

There are other high adrenaline, specialist activities which fall under the blanket of Adventure Tourism, such as skydiving, bungee jumping, river-bugging, caving and coasteering. In the HIE report these activities have been included in the sector definition for this study; although they are typically considered less valuable in terms of visitor spend.

Adventure Tourism is often broken down in to:

- Soft adventure, described as 'a travel experience that goes beyond the typical tourist itinerary... is rewarding for the spirit and the mind... is safe without excessive physical demands'
- Hard adventure, a travel experience that has 'more physical challenges, a higher element of risk, is rewarding to the spirit, and pushes people outside of the comfort zone'

The HIE report states that in 2015 there were at least 350 Adventure Tourism businesses operating at the time in Scotland, with more than a third of these AT businesses being located in the Highland Council area, followed by 12% in Argyll and Bute and 8% in Perth and Kinross. These three areas account for more than half of AT businesses in the sector. In this report only 2 operators were identified in South Ayrshire.

Fort William is the self-proclaimed "*Outdoor Capital of the UK*" and hosts major adrenaline events such as the 'World Mountain Biking Championships'. Fort William along with Aviemore are the most recognisable 'outdoor' centres in Scotland, and whilst Aviemore has more AT businesses, while Fort William offers perhaps the greatest range and breadth of offer. Fort William has a strong brand, sits in a location that offers a coastline, forests and

the UK's highest mountain close by, and a broad range of activities giving is a particular strength.

Businesses range in size; a quarter of the sector are sole traders (26%), although this is likely to under-estimate the number of self-employed persons in the sector. Nearly seven in ten AT businesses are small (employing between 1 and 49 FTE staff). A small number are medium (4%) and only 1% are large. AT businesses in Scotland typically operate locally or regionally in terms of their geographical sphere of operation. In all, just under half (47%) deliver their activities locally and a further third (32%) operate regionally. Around 7% operate across Scotland and 1% operates across the UK. Around 1 in 8 (13%) operate internationally.

The HIE report quotes the previous national tourism strategy 'Tourism Scotland 2020', which identified both 'activities and adventure' (estimated value £759m) and mountain biking (estimated value £119m) as sectors with real growth potential (based on the above VisitScotland figures), also acknowledging the value of walking, cycling, sailing and adventure tourism in many rural areas' [Source: Adventure Tourism in Scotland 2015, Highlands & Islands Enterprise <https://www.hie.co.uk/media/3106/adventureplustourismplusinplusscotlandplus-plusfinalplusreport.pdf>]

The Scottish Wildlife & Active Tourism Association 'Wild Scotland' shares best practice and also operates as a platform to promote 'Adventure Tourism' in Scotland. In South Ayrshire the adventure experience operator Adventure Carrick <https://adventurecarrick.com/> based out of Girvan offers a range of land and water-based activities.

VisitScotland in 2020 reported that: *"The pandemic has seen an increase in interest in outdoor adventures, with cycling, running and open water swimming growing in popularity among Scots both during and post-lockdown.*

Scotland's landscape and climate make it ideal for the growing interest from visitors in adventure and nature-related activities, from mountain biking, sailing and rafting to more gentle experiences such as foraging and wild camping.

Last year, GB residents took 290,000 overnight visits to Scotland where adventure sports were part of the trip, contributing £112 million in spend. Walking and hiking were the most popular activities amongst overnight visitors, with 1.6 million trips involving a long walk, hike or ramble (more than two miles) and 2.7 million trips involving a short walk or stroll (up to two miles) (Source: Great Britain Tourism Survey).

Marine Tourism is valued at £411m with sailing accounting for £131m (Source: Great Strides Marine Tourism Strategy)."

[Source: <https://www.visitscotland.org/news/2020/adventure-tourism-week-goes-virtual>].

2020 saw the publication of 'Great Strides: A Maritime Tourism Strategy 2020- 2025 <https://scottishtourismalliance.co.uk/wp-content/uploads/2020/08/FINAL-Strategy-Document-Giant-Strides-2020-2025.pdf> which provides a strategy and framework for the strategic development of Scotland's water based tourism activity.

A recent report from Scottish Natural Heritage states: *"Adventure tourism is an expanding market with over 350,000 holiday trips to Scotland made by visitors undertaking adventure activities, including mountain biking, every year. It combines elements of physical activity, interaction with nature and cultural exploration and discovery. The active element includes*

canoeing and kayaking, surfing, sub aqua, sailing, mountain biking, cycling, extreme snow sports, horse riding and adventure activities such as rafting or paragliding. All rely on a diverse, high quality natural environment. The value to the economy of adventure activity tourism is £178 million per year.”

[Source: Valuing Nature Based Tourism in Scotland, SNH (2019) <https://www.nature.scot/sites/default/files/2019-07/Valuing%20nature%20based%20tourism%20in%20Scotland.pdf>]

Recommendation: *In light of the continued growth of adventure tourism in Scotland and as an outcome of the Coronavirus Pandemic, a fuller assessment of the opportunities for adventure tourism in South Ayrshire including Dunure, Maidens, Turnberry & Kirkoswald (and potentially with Galloway) would give a fuller understanding of the potential opportunities for the area to develop and promote itself as an adventure tourism destination.*

5.5 Monitoring of visitors

The area would benefit from a regular survey of parking and use of public spaces, which could incorporate data collection in relation to litter. This can easily use data collected digitally by partners such as NTS, Trump Turnberry, Nature Scot and SAC, along with trunk road data from Transport Scotland, but it can also be managed as a community initiative and educational project by local people, including school children, to demonstrate community commitment for any funder considering funding applications.

Recommendation: *A regular community-led ongoing monitoring of visitors is recommended*

The survey can involve the regular collection of the following data with observations at, say, 0800, 1200, 1400, 1600 and 1800 on particular days, e.g. the first Wednesdays and Saturdays in March, August and November, as well as Hogmanay, Easter Sunday and the first Bank Holiday in May.

Example of potential survey matrix:

Date/ Location / Weather (and any other significant event or circumstance)	Cars parked	Motorcaravans parked	Number of litter bins empty, full or overflowing	Observations of waste (dog waste or otherwise, dirty camping, litter, etc.)
Designated public car parks				
Car parks at key sites (e.g. Kennedy Park carpark, Dunure parking locations, Maidens Car Parks, Croy Beach, Turnberry beach & Lighthouse access, and Culzean Country Park)				
Known “overspill”				

areas				
-------	--	--	--	--

In addition other survey activity to gather more detailed visitor information, profiling and levels of visitor satisfaction should be established using for example a SurveyMonkey questionnaire linked to local web sites and social media such as local Facebook pages. Localised (fine grained) data collection could be enhanced by 'data scraping' by the likes of COIG and Destination Ayrshire drawing on data from sources such as google and trip advisor. Collaboration with Further and Higher Education partners should be explored as a source of intelligence gathering on visitors to the area.

5.6 Coastal North Carrick Tourism Partnership (CNCTP)

An important aspect of delivering on the community development plans, to build on the combined work across both sets of communities through the community steering groups leading on this piece of partnership work, targeted on these local coastal communities as per the funding from the NatureScot 'Better Places Green Recovery Fund', and under the auspices of NCCBC, is to formalise the cross-community collaboration through a more formalised partnership.

Creation of a cross community partnership for the development and management of the North Carrick Coastal communities will ensure the co-creation of shared development plans, agreeing development and management priorities in each settlement, avoiding duplication of effort and unnecessary competition for scarce resources.

Membership of the cross community partnership would include representatives from community groups in the communities of Dunure & Fisherton and Kirkoswald Maidens and Turnberry (the project steering group for this piece of consultancy work represents the kind of cross community representation that would form the basis of the partnership), representatives from local businesses (such as Culzean Castle & Country Estate; Trump Turnberry Resort; Wildings Hotel & Restaurant; Culzean, Cassillis & Blanefield Estates; Pirley Hill Farm; A D Rattray Whisky Shop, Carrick Adventures) and NCCBC. The harbour trusts, landed estates and local businesses should be actively encouraged to participate, but cannot not be forced.

In advancing the nature and final form of structure and governance of a new community partnership, full consideration needs to be given to: community capacity and the need to dovetail with existing partnerships to ensure that there is no replication and duplication of effort with existing delivery and community development organisations; to encourage new community volunteers to share the load; that a new partnership is 'fit for purpose'; and creates a vehicle which will help unlock access to new resources and funding.

There would be merit in establishing a transitional Board for, say, 12-18 months, that could be created in advance of elections to engage all the necessary stakeholders and thereby demonstrate the value of collaborative approach and the need to involve some organisations that might not necessarily be perceived as entirely community focused.

The organisation would be constituted as a not-for-profit entity as a body or vehicle with the ability to apply for funding and manage financial resources (for capital and revenue projects). It could adopt one of several structures, including CIC (community interest company), SCIO (Scottish charitable incorporated organisation) or some kind of co-operative or social enterprise.

Full (ordinary) membership of the proposed CNCTP might include individuals living and/or working in the postal districts of KA7, KA19 and KA26 (or some other formulation reflecting

the geographic constituency of Dunure and KMT community councils), whilst associate (non-voting) membership might be open to those with a personal interest in the area, either as regular visitors or as part of the North Carrick diaspora, which can of course include Americans.

The Board might comprise:

- ❖ 1 nominated representative of Dunure CC
- ❖ 1 nominated representative of KMT CC
- ❖ 2-4 locally elected members of the Dunure CC area
- ❖ 2-4 locally elected members of the KMT CC area

Constitutionally, nominated CC representatives would be acting as individual members and not as representatives of their respective organisations.

The chair would be chosen by the Board, and would need to be seen as “independent”.

There would be a standing invite to appropriate local elected members and officials from South Ayrshire Council, Scottish Enterprise, NTS, Turnberry, VisitScotland and the future Destination Ayrshire organisation to participate as observers in the partnership. It would be helpful to bring on board if possible representatives of a younger age demographic to represent the development interests of this group. Advisory panels and project working groups under the auspices of the partnership are another way to achieve wider engagement and representation.

The ‘Terms of Reference’ would include:

- Stewardship, evolution, and collective delivery of the Coastal North Carrick recommendations, action plan and shared development agenda set out in this report;
- Engagement with the community to ensure the realisation of responsible tourism objectives for the Coastal North Carrick communities, taking account of NatureScot’s ‘Management for People’ system and toolkit;
- Articulation of on-going community support needs from public agencies such as South Ayrshire Council (ensuring fulfilment of their statutory responsibilities relating to the good ‘housekeeping’ destination (i.e. maintenance of roads and pathways, advancement of active and green public transport initiatives, road safety measures, road & path signage, play equipment, car parking, public toilet provision, managing waste & litter, interpretation, and landscape improvements) and Destination Ayrshire (i.e. communication and messaging about the destination, creation of itineraries and packing of visitor experiences, and gathering and sharing of data and intelligence on visitors and key markets);
- Identification of and assistance in supporting community initiatives (such as skills and training projects, local events; care and maintenance of the natural environment, civic amenities);
- Monitoring of visitors to the area (i.e. car park and path usage counts);
- Acting as a representative body to engage with other community development groups for example in Girvan and Maybole, and with other initiatives (i.e. Destination Ayrshire, NCCBC, and UNESCO Galloway & South Ayrshire Biosphere).

The cross-community partnership will assist in bringing on board key stakeholders such as the local authority and other public agencies, will ensure more effective stewardship of the destination, and realise a strong single voice and act as a platform for effective engagement with organisations such as Destination Ayrshire. The CNCTP also offers the potential to be a vehicle for raising and holding funding as a community based and not for profit organisation.

The benefits of having a unified voice on the development proposals for the communities, and their asks of South Ayrshire Council, and the proposed new destination Ayrshire organisation, is critically important at this time as local destination management and promotion is recast as a result of the impacts of the COVID-19 pandemic on Scottish and local tourism.

The local Coastal North Carrick Tourism Partnership (CNCTP) in progressing the investment programme for the enhancement of the community and visitor experience, infrastructure and facilities development programme, and the promotional messaging around the narrative and imagery for the destination will help focus the direction of travel of Destination Ayrshire. It will ensure that the necessary market intelligence gathering and research by partners such as VisitScotland, South Ayrshire Council, Destination Ayrshire, Nature Scot and others is undertaken to help understand the market dynamic of the area better and the future visitor profile. The partnership will also help in engagement with other initiatives in the area like the community tourism pilot in Girvan and the regeneration project in Maybole.

The partnership will also help identify and secure the necessary skills development and training for community representatives in terms of community development leadership and capacity building, and in developing specific skill sets for the delivery of specific projects for example destination development and management, events, interpretation and fundraising. The partnership will also identify specific skills development and training needs of local volunteers and training and employability projects to enhance local residents' employability opportunities linked to enhancing the visitor experience in the communities, advancing responsible and sustainable tourism objectives, improving customer care, and improving visitor management. Skills and training objectives will be progressed in collaboration with local skills and employability partners organisations (for example NCCBC, South Ayrshire Council, Skills Development Scotland, local Higher & Further Education providers, Skills Development Scotland, Springboard, Scottish Enterprise, and third sector organisations). A skills development and training plan should be developed.

By establishing itself as a leader in responsible coastal tourism, heritage tourism and sustainable community-led destination management, CNCTP can potentially earn revenue by providing guidance to other community tourism enterprises through training programmes, including learning journeys. There is a growing international market for this kind of skills development, and Scotland is positioning itself as a "leader in 21st century tourism". A good starting point would be for all local tourism enterprises to commit to the Paris Agreement in advance of COP26, which can be done through a range of mechanisms, including:

- <https://www.unhscotland.org.uk/from-paris-to-cop26>
- <https://www.tourismdeclares.com/>
- <https://www.green-tourism.com/pages/home>
- <https://climatefriendly.travel/>

They can also help advance VisitScotland's *Responsible Tourism Promise* (<https://www.visitscotland.com/responsible-tourism-promise/>).

Recommendation: *Creation of a Coastal North Carrick Tourism Partnership (CNCTP) is proposed to act as the custodians of the action plan identified in this report, continue to identify and co-ordinate destination management and development opportunities across the communities, progress destination stewardship to promote responsible and sustainable tourism, ensure that progress is being made on delivery of key actions, act as a pilot and case study in community tourism leadership and management. To act as a vehicle to secure resources, potentially from NCCBC and other partners, to employ a project officer on a three-year contract to provide administrative support to the community volunteers, and to*

oversee progress on advancement of the development and action plans that will provide a 'kick start' to the aspirations of the communities post the hiatus of COVID-19.

6 ACTION PLAN

This action plan draws on the two existing Development Plans for KMT and Dunure (& Fisherton) and includes additional actions that have been identified that are relevant to the wider coastal North Carrick destination and have been identified in this consultation and review exercise. Whilst it would be great to implement the development plans in full immediately, this would not be realistic, and – in destination management terms – it would be inhibiting and ultimately detrimental to proceed with discrete plans for the two areas. Rather, we have assessed the opportunities for coastal North Carrick as an integrated whole and determined an intervention timetable that is both possible and realistic. This involves some key product developments that build on the comparative advantages of each area and build local capacity to manage the destination to meet the needs of new markets. In the case of Dunure, the focus is on local history and cultural heritage, whilst the focus for KMT is the marine coast and natural heritage, with the harbour and beach for water sports, including fishing, and beach and adjacent land for walks and appreciation of flora and fauna, including avifauna. The primary intervention in relation to institutional capacity building is the development of the Coastal North Carrick Tourism Partnership (CNCTP).

Action	Priority (1: essential, 4: a bonus)	Urgency (timing to be effective)	Impact (A: transformational, D: marginal)	Possible lead stakeholder
Creation of Coastal North Carrick Tourism Partnership	1	6 months	A	NCCBC / Community project group
Advance heritage master plan for Dunure	1	1-2 years	A	CNCTP "Harbour Trust", Dunure Castle, Creative Scotland, "National Lottery"
Attract and support water-based activity operators to NC	1	Within 1 year	A	NCCBC with support from Wild Scotland and Sail Scotland
Involve NTS Culzean in NC tourism management	1	Within 1 year	A	CNCTP + NTS
Advance plans for activity centre at Maidens Harbour	1	2-5 years	A	NCTP "Harbour Trust", SportScotland, Scottish Enterprise, "National Lottery"
Devise plan for public toilet provision in KMT	1	Within 6 months	B	SAC / NatureScot /CNCTP
Adopt a sustainable tourism policy for North Carrick	1	Within 1 year	B	NCCBC, SAC, VS
Involve Trump Turnberry in NC tourism management	1	1-2 years	B	CNCTP + Trump Turnberry
Begin transport survey (car parks / key access roads)	1	Within 6 months	C	NCCBC
Appoint heritage officer (with "Bruce 2024" responsibility)	2	Within 6 months	A	SAC
Establish "Bruce Country" brand for local products and businesses (esp. if IndyRef2 is coming)	2	Within 1 year	A	CNCTP with NCCBC and support from Scottish Enterprise
Devise retail / "farm shop" destination	2	2-5 years	A	NCCBC with support from Scottish Enterprise
Devise litter picking programme	2	Within 6 months	B	Dunure and KMT Community Councils, with support from Keep Scotland Beautiful
Connect with South Carrick within Destination Ayrshire	2	Within 6 months	B	CNCTP / NCCBC
Attract and support catering enterprise in Kennedy Park	2	Within 1 year	B	NCCBC with support from Scottish Enterprise
Devise plan for regular path maintenance	2	Within 1 year	B	CNCTP with NCCBC and SAC
Enhance facilities in and around Kennedy Park	2	1-2 years	B	Dunure Hall & Park Assoc. / CNCTP/ SAC/NCCBC
Develop regular Maidens Festival (incl. "Bruce 2024") and Festival of the Sea, Dunure	2	1-2 years	B	Dunure Community KMT Community Council with support from SAC, Creative Scotland and EventScotland, NCCBC, CNCTP
Improve and maintain road (and path) signage	2	Within 1 year	C	Transport Scotland

throughout North Carrick				VisitScotland, SAC
Conceive and implement sculpture park for Maidens	3	1-2 years	A	CNCTP
Devise lighting strategy for Dunure Castle	3	1-2 years	B	CNCTP
Establish community garden in Maidens	3	1-2 years	C	CNCTP /KMT Community Council
Devise wildfowl viewing strategy for Maidens	3	2-5 years	C	Ayrshire branch of www.the-soc.org.uk

The following table provides an indicative budget for the different interventions.

Action	Start up costs	Annual operating / maintenance costs	Revenue opportunity	Possible funding sources
Creation of Coastal North Carrick Tourism Partnership	£1,000	£50,000	Member contributions for community projects	SAC, NCCBC, NatureScot, Community Lottery, VisitScotland, Scottish Enterprise
Advance heritage master plan for Dunure	£500,000	?	Enhanced partner contributions	Dunure Harbour, Creative Scotland, "National Lottery", Historic Environment Scotland, Clore Duffield Foundation
Attract and support water-based activity operators to NC	?	-	Potentially significant	Scottish Enterprise, Wild Scotland, Sail Scotland
Involve NTS Culzean in NC tourism management	-	-	Modest contribution?	NTS
Advance plans for activity centre at Maidens Harbour	£500,000	?	Enhanced partner contributions	"Harbour Trust", SportScotland, Scottish Enterprise, "National Lottery"
Devise plan for public toilet provision in KMT	£250,000	£25,000	Increased dwell time, encouraging enhanced local spend	SAC / NatureScot
Adopt a sustainable tourism policy for North Carrick	?	-	Study tours to competitor destinations	NCCBC
Involve Trump Turnberry in NC tourism management	-	-	Shared contribution?	Trump Turnberry
Begin transport survey (car parks / key access roads)	-	£100	-	NCCBC, SAC
Appoint heritage officer (with "Bruce 2024" responsibility)	-	£40,000	Potentially significant	SAC, Event Scotland, Scottish Enterprise
Establish "Bruce Country" brand for local products and businesses (esp. if IndyRef2 is coming)	£10,000	£30,000	Potentially significant	Scottish Enterprise, Social Enterprise
Devise retail / "farm shop" destination	£1m	?	Potentially significant	SAC, Scottish Enterprise, Scottish Government
Devise litter picking programme	-	£500	Reduced waste management costs	Dunure and KMT Community Councils, with support from Keep Scotland Beautiful
Connect with South Carrick within Destination Ayrshire	-	-	Expanded market opportunity	
Attract and support catering enterprise in Kennedy Park	£25,000	?	Potentially significant	Scottish Enterprise (Ayrshire Food Initiative), Millward Charitable Trust
Devise plan for regular path maintenance	£60,000	£10,000	Expanded market opportunity	SAC
Enhance facilities in and around Kennedy Park	£150,000	£10,000	Expanded market opportunity	Awards for All, SAC, Robertson Trust
Develop regular Maidens Festival (incl. "Bruce 2024") and Festival of the Sea, Dunure	£100,000	£50,000	Potentially significant	SAC, Creative Scotland, EventScotland, VisitScotland, Community Lottery
Improve and maintain road (and path) signage throughout North Carrick	£20,000	£2,000	Expanded market opportunity	Transport Scotland VisitScotland, SAC
Conceive and implement sculpture park for Maidens	£500,000	£50,000	Expanded market opportunity	Creative Scotland, local landowners
Devise lighting strategy for Dunure Castle	£25,000	£2,500	Expanded market opportunity	Historic Environment Scotland, SAC, Event Scotland
Establish community garden in Maidens	£10,000	£1,000	Expanded market opportunity	Awards for All, Community Climate Asset Fund
Devise wildfowl viewing strategy for Maidens	£10,000	£1,000	Expanded market opportunity	Awards for All

Costs quoted are indicative estimates. Some interventions will only be achieved through significant capital investment from national and regional funds, whilst others can to some

extent be delivered through a combination of public sector support and community volunteering. However, whilst volunteerism is positive, it cannot become a dependency. To be sustainable, local capacity needs to be built, including creating opportunities for new local enterprises and skills, especially for young people. This means that, rather than relying on external inputs, it is essential that stakeholders try wherever possible to identify and develop local skills and expertise, so that people know that coastal North Carrick is truly a place to live, work, invest and visit.

A theme running through this action plan is King Robert I, commonly known as “Robert the Bruce”. Recently profiled in the Hollywood film *The Outlaw King* (2018) and famously misrepresented in *Braveheart* (1995), Bruce remains a profoundly important and popular historical figure. Born on 11 July 1274, (probably) at Turnberry Castle, the 750th Anniversary of his birth will fall on Thursday 11 July 2024 and the 700th Anniversary of his death will fall on Thursday 7 June 2029. Closely associated with Scotland’s Independence due to victory at Bannockburn (1314) and subsequent Declaration of Arbroath (1320), it is highly likely that the 750th Anniversary will coincide with Scotland’s next “Year of Homecoming”, and it is possible that this could also mark Scotland’s renewal as an independent country following the proposed second independence referendum. This represents a formidable opportunity for North Carrick. However, whilst “Carrick” is known locally, it has little resonance or visibility beyond Ayrshire, except amongst specialist historians and statisticians. The current Earl of Carrick (HRH The Prince of Wales) is indirectly related to King Robert and, whilst he might be persuaded by a Westminster administration to fly the Union Flag at Turnberry, it is not clear that his association with the area would in any way enhance the North Carrick brand. There is a greater opportunity to promote the area as “Bruce Country” (or similar), which will resonate with Hollywood fans and can be the start of a story demonstrating the importance of the North Carrick coast in the history and identity of modern Scotland. Locally the idea of creating a ‘Lion of Alba’ statue in a prominent location in the area commemorating ‘King Robert the Bruce’ in advance of 2024 has been mooted.

The promotion of “Bruce Country” branded products can also support the positioning of North Carrick as a *global* champion: think globally, act locally. Responding to the Climate Emergency, also declared by the Scottish Government, VisitScotland, Wild Scotland, Sail Scotland and others, all local tourism enterprises can be encouraged to declare a Climate Emergency, particularly in advance of the UNFCCC’s COP26 being held in Glasgow in November 2021, and “Bruce Country” can become a beacon for sustainability in Scotland.

On this basis, there is a case for the proposed CNCTP becoming the “Bruce Country Tourism Partnership” (BCTP).

7 SWOT ANALYSIS

This SWOT analysis summarises our assessment of the current situation.

Strengths	Weaknesses
<ul style="list-style-type: none"> ➤ Existing active & engaged communities ➤ Engaged local elected members ➤ Existing community / tourism development plans –vision & agenda ➤ Established visitor infrastructure (accommodation, attractions, activities, & services) ➤ NCCBC leadership, support & funding ➤ A strong set of destination assets (coastline & beaches; scenery, history and heritage; flora, fauna & geology) ➤ Existing consumer awareness of destination/ product ➤ Long term loyal customers (i.e.. mobile home owners & repeat visitors to Culzean / Turnberry) ➤ A strong set of destination themes & narratives (e.g. Burns, Bruce; Outlander; Culzean; Kennedy Clan; coast & countryside; golf, Biosphere; COIG Shire Route; SWC 300) ➤ Proximity to / access from central Scotland conurbation & population ➤ Access to English visitor market for short breaks ➤ Water based sports / cycling & walking opportunities ➤ Welcoming people 	<ul style="list-style-type: none"> ➤ Catch up from long term under investment in local 'public' infrastructure (public toilets, upkeep of physical spaces, heritage structures,& path /road infrastructure) ➤ Poor public transport links, including connections to Maybole (transport hub) ➤ Enhanced range of quality visitor services (accommodation, wet weather / year round attractions/ eating out options) ➤ Scale, quality, & range of harbour facilities (improved dredging @ Maidens) ➤ Anti-social Jet Skiers at Maidens ➤ Existing usage of long distance path networks / walking routes ➤ Underperformance of Ayr & Girvan (as local service and gateway points) ➤ Engagement with younger members of the community in developing & progressing plans ➤ Lack of visitor intelligence ➤ Levels of collaboration with key local attractions (NTS Culzean and Trump Turnberry) ➤ "North Carrick" brand
Opportunities	Threats
<ul style="list-style-type: none"> ➤ Strong set of destination assets (coast countryside & scenery, history and heritage, access to nature, adventure tourism & active recreation, wellbeing & transformative tourism) in demand post COVID-19 ➤ Strength of domestic tourism post COVID-19 ➤ Conversion of day trippers to overnight stays ➤ Extending the visitor season ➤ New entrepreneurs with new visitor experience/ product ideas ➤ Packaging of the visitor experience to match new market opportunities ➤ Investment in active and green travel - opportunity to be a pioneer and national leader ➤ A spirit and ethos of collaboration and partnership ➤ To become an exemplar community tourism development partnership ➤ Ayrshire Growth Deal/ Ayrshire Tourism Task Group focus – Destination Ayrshire proposals ➤ Greater engagement with NTS (Culzean Castle & Country Park) ➤ Engaged local landowners ➤ Trump Turnberry Resort ➤ 2024 & 750th Anniversary of birth of 'Robert the Bruce' ➤ "Independence" brand in context of IndyRef2 ➤ SG Year of Homecoming (probably 2024) ➤ Quality of local produce (provenance) ➤ Creating a platform as a catalyst for inflow of private sector investment ➤ Travel technology (i.e. cost effective engagement with visitors/ data & intelligence on visitors/ heightened digital presence for destination / visitor management and enhancement of the visitor experience through application of digital technology) ➤ Strength of the wider South West Scotland product ➤ Era of community owned (social) enterprises ➤ Ethos of responsible and sustainable tourism reflected in Scotland: Outlook 2030 tourism strategy ➤ Birding ➤ Art installations and sculpture parks ➤ Marine tourism (network of harbours and marinas) ➤ Culzean Way ➤ Island of Ireland markets via ferry service 	<ul style="list-style-type: none"> ➤ Competitor activity in Scotland and internationally ➤ Ongoing domestic and international market disruption from COVID-19 (economic recession) ➤ European market disruption (movement of skilled labour) due to Brexit ➤ Increased costs and less reliable supply chains due to Brexit ➤ Competition for scarce investment resources ➤ Volunteer fatigue ➤ Lack of collaboration between different community groups & between industry players ➤ Community capacity and capability – skills & experience in destination leadership, development, management & promotion ➤ Potential negatives around the Trump brand and/or divestment ➤ Pressures from 'overtourism' / overwhelming & degradation of existing infrastructure as a result of 'ultra' domestic tourism ➤ Sustaining community credibility through delivery on the ground (successfully translating plans into tangible action) ➤ Aging demographic of South Ayrshire community - outflow of younger generation through lack of economic opportunity ➤ Tensions between resident community who wish to keep status quo & those who see benefits from tourism in support of local amenity, infrastructure, services and visitor economy ➤ Lack of ambition for the destination ➤ Uncertainty resulting from Independence plans ➤ Climate Emergency, including coastal erosion, more erratic weather and (eventual) failure of the Gulf Stream

8 BEST PRACTICE CASE STUDY EXAMPLES

- The Highlands and islands of Scotland through the work of Highland Council and Highlands and Islands Enterprise (HIE) have been focusing on Community Tourism Leadership and also proactive destination management, development and infrastructure investment. HIE working with the Social Enterprise Academy have been working with South of Scotland Enterprise on the **Communities Leading in Tourism** initiative to build capacity and capability amongst local community representatives to lead destination development and management
<https://www.socialenterprise.academy/scot/communities-leading-in-tourism>

Highland Council have been responding to growing visitor numbers in the area, the need for more motorcaravan 'Aire' facilities and public toilet infrastructure as a result of the domestic tourism boom linked to the COVID-19 coronavirus pandemic and based on popularity of 'honeypot' destinations on the NC500 route and in the likes of Skye in March 2021 signed off a **5 Year Visitor Management Plan** and also developing in tandem a strategic tourism infrastructure programme.
https://www.highland.gov.uk/news/article/13487/visitor_management_plan_agreed_for_highland

The Communities Leading in Tourism initiative has useful learning points for the North Carrick communities.

- Perth & Kinross Council has a number of initiatives that have been developed in response to the surge in 'ultra' domestic tourism in 2020 and issues around 'dirty camping' and visitor pressures on key destinations such as Kenmore on Loch Tay, Glen Lyon, Loch Tummel and Loch Rannoch. The Council has set up a Visitor Management Group and specific responses that the North Carrick coastal communities and South Ayrshire can learn from, include the local 'countryside volunteers working under the auspices of the safer communities team and encouraging responsible tourism and adherence by visitors to the Scottish Outdoor Access Code and the creation of a number of Aire 'informal' motorcaravan sites.
<https://www.visitscotland.org/news/2020/irresponsible-camping-bulletin>
- Fife Tourism Partnership is a good example of a destination partnership and management structure with a paid for project officer, with projects that are indicative of the type of outputs of the partnership being the recent success in securing VisitScotland Rural Tourism Infrastructure Fund funding of £375,000 towards the Fife Outdoor Tourism Infrastructure Programme – a partnership project between Fife Council and Fife Countryside Trust, to provide a network of parking, toilets, interpretative and renewable energy points for EV and EB charging serving the Fife coastal path, The Pilgrims Way and Fife 191 driving route.
<https://www.fifetourismpartnership.org/news/rural-tourism-infrastructure-projects-to-receive-share-of-3m-funding/>
- Moray and Speyside is a good example of strong local partnership and has been successful in securing a Tourism Business Improvement District that is operating as a local Destination Management Organisation [DMO] Visit Moray & Speyside. The Tourism BID is focused on marketing and promotion, improving the visitor experience, and supporting tourism businesses
https://morayspeyside.com/app/uploads/2021/03/Tourism_BID_Business_Plan_For_Email.pdf / Moray Council is also progressing visitor management interventions to address post Coronavirus pandemic visitor pressures by investing in motorcaravan 'Aires' informal camping sites for 2021 <https://www.northern-scot.co.uk/news/moray-getting-five-new-motorhome-sites-230194/>

- As a case study for the Dunure Community aspirations for a Dunure Heritage Development Plan and creation of a community hub and heritage centre in the Kennedy Park a good case study example of a Community Interest Company running a similar facility in North Ayrshire is the Dundonald Castle Visitor Centre <https://www.dundonaldcastle.org.uk/cat-success-feb21/>
- A similar community based enterprise which is focusing on tourism and community development is the Glen Urquhart Regeneration Company <https://gurca.co.uk/> in Drumnadrochit on the banks of Loch Ness. This community company is focused on a number of tourism and community projects including the Renovation of the Village Hall, the operation of the Tourist Information Centre which was closed by VisitScotland, creation of amenity parkland, operation of the Urquhart Castle Visitor Centre, a local energy plan and delivery of a community action plan.
- Other rural communities with community trusts and interest companies in the highlands which are worth keeping an eye on are the Assynt Development Trust <https://assyntdevelopmenttrust.org/> , Applecross Community Company <https://www.applecrosscommunitycompany.org/> and The Findorn Village Conservation Company <http://www.findhornvillageconservation.org.uk/index.asp>
- In relation to Dunure's Festival of the Sea and the Maiden's Gala and the potential to develop more community based maritime themed events perhaps the most successful such event to emulate is the Scottish Traditional Boat Festival Port Soy <https://www.stbportsoy.org/>
- With respect to the issues relating to potential safety concerns relating to Jet Ski use at Maidens there is value in exploring how the Loch Lomond & Trossachs National Park has responded to this issue and their Bylaws on Jet Skis <https://www.lochlomond-trossachs.org/wp-content/uploads/2016/07/Loch-Lomond-Byelwas-2013.pdf> and the Loch Awe Safety Code of Conduct <https://www.argyll-bute.gov.uk/moderngov/mgConvert2PDF.aspx?ID=63337> VisitScotland in March 2021 published a Responsible Visitor Guide which should be promoted to visitors to the area *VisitScotland Responsible Tourism Business Guide (March 2021)* <https://www.visitscotland.org/supporting-your-business/advice/coronavirus/responsible-tourism/responsible-visitor-guide>
- Adventure Tourism is an area which the North Carrick Coastal communities and South Ayrshire could capitalise on and there a number of destination examples and sources of information to draw upon including: 'The Adventure Junkie's Guide to Scotland' VisitScotland <https://ebooks.visitscotland.com/adrenaline-junkies/bungee-jump-ideas/> ; Wild About Argyll <https://www.wildaboutargyll.co.uk/see-do/> ; Lets Grow Adventure Tourism (Highlands & Islands Enterprise) <https://www.hie.co.uk/support/browse-all-support-services/lets-grow-adventure-tourism/> Go North Wales <https://www.gonorthwales.co.uk/things-to-do/activities/adventure-and-outdoor> Anglesey Adventures <https://www.angleseyadventures.com/>
- Wellbeing tourism is one of the strongest emerging trends that have accelerated as a result of the Coronavirus health pandemic. The importance of reconnecting with nature and restorative powers of spending time in the natural environment is well documented and South Ayrshire is well placed to capitalise on its natural environment to develop tourism products focused on wellbeing. Agritourism and the

promotion of locally grown and sourced food are strong elements of well-being tourism. The Scottish Enterprise Agritourism Monitor Farm Programme is a three-year programme established in 2019 to provide expert and peer group support, knowledge exchange, skills development and confidence building to a wide range of agritourism and rural businesses across Scotland. <https://agritourism-monitorfarm.com/> A recent article: *Health tourism 'a growing opportunity' for Scottish farms*, Farming UK 22 March 2021 https://www.farminguk.com/news/health-tourism-a-growing-opportunity-for-scottish-farms_57846.html offers some good pointers on the type of developments that can be advanced. The Coastal North Carrick communities are keen to promote responsible tourism to ensure balanced tourism development and that the high quality scenic beauty and natural environment in the area is respected and appreciated by all. The recently published VisitScotland Responsible Tourism Business Guide (March 2021) <https://www.visitscotland.org/supporting-your-business/advice/coronavirus/responsible-tourism/responsible-visitor-guide> represents a good base on which to build such messages with visitors to our communities.

9 DELIVERY VEHICLES & FUNDING OPPORTUNITIES

Funding Sources

Rural Tourism Infrastructure Fund VS <https://www.visitscotland.org/supporting-your-business/funding/rural-tourism-infrastructure-fund/>

Heritage Lottery Fund Scotland <https://www.heritagefund.org.uk/in-your-area/scotland>

Nature Scot Green Community Funds

<https://www.nature.scot/search?query=community+funding>

[Natural and Cultural Heritage Fund: Our Projects | NatureScot](#)

[Better Places Green Recovery Fund - INFORMATION FOR APPLICANTS | NatureScot](#)

Lottery landscape Partnership <https://www.heritagefund.org.uk/our-work/landscapes-parks-nature/landscapes>

Community Interest Company [https://www.mygov.scot/social-](https://www.mygov.scot/social-enterprise/#:~:text=A%20CIC%20is%20a%20special,apply%20to%20Companies%20House%2C%20and%3A&text=get%20your%20company%20approved%20by,automatically%20be%20sent%20to%20them)

[enterprise/#:~:text=A%20CIC%20is%20a%20special,apply%20to%20Companies%20House%2C%20and%3A&text=get%20your%20company%20approved%20by,automatically%20be%20sent%20to%20them](https://www.mygov.scot/social-enterprise/#:~:text=A%20CIC%20is%20a%20special,apply%20to%20Companies%20House%2C%20and%3A&text=get%20your%20company%20approved%20by,automatically%20be%20sent%20to%20them)

Arts & Business Scotland: Culture & Business Fund

<https://www.aandbscotland.org.uk/culture-and-business-fund-scotland/>

Event Scotland Funding <https://www.visitscotland.org/events/funding>

Creative Scotland <https://www.creativescotland.com/funding>

National Lottery Awards for All Scotland

<https://www.tnlcommunityfund.org.uk/funding/programmes/national-lottery-awards-for-all-scotland>

Coastal Communities Fund <https://www.gov.scot/publications/coastal-communities-fund/>

Interface <https://interface-online.org.uk/>

Travel Tech Scotland <https://efi.ed.ac.uk/traveltech-scotland/>

Clore Duffield Foundation <https://www.cloreduffield.org.uk/>

The Robertson Trust <https://www.therobertsontrust.org.uk/>

Millward Charitable Trust

Organisations and partnerships

SENScot <https://senscot.net/network/tourism/>

The COIG <https://thecoig.com/>

Scotland Food & Drink <https://foodanddrink.scot/who-we-are/>

Sail Scotland <https://www.sailscotland.co.uk/>

SportScotland <https://sportscotland.org.uk/>

NatureScot <https://www.nature.scot/>

Royal Yachting Association Scotland
<https://www.rya.org.uk/scotland/Pages/hub.aspx>

SRUC Scotland's Rural College <https://ww1.sruc.ac.uk/business-services/help-in-your-sector/agritourism/>

Scottish Coastal Rowing Association <https://scottishcoastalrowing.org/>

Wild Scotland <http://www.wild-scotland.org.uk/industry/>
Wildlife, Adventure and Activity Tourism Industry Association for Scotland.

Galloway & South Ayrshire Biosphere <http://www.unesco.org/new/en/natural-sciences/environment/ecological-sciences/biosphere-reserves/europe-north-america/united-kingdom-of-great-britain-and-northern-ireland/galloway-and-southern-ayrshire-biosphere>

Ayrshire Growth Deal <https://www.ayrshiregrowthdeal.co.uk/>
Borderlands Inclusive Growth Deal <https://www.borderlandsgrowth.com/>

North Carrick Community Benefit Company <https://nccbc.org.uk/>

APPENDICES

Appendix A: References / Sources

56 Degree Insight: Scottish Tourism Index Wave 5 (March 2021)

<https://www.56degreeinsight.com/scottish-tourism-index-march-21>

Business Gateway Market Report on Adventure Tourism

<https://www.bgateway.com/assets/market-reports/Adventure-Tourism.pdf>

CAMpRA Motorcaravan Survey Results 2020

<https://campra.org.uk/download/campra-motorcaravan-survey-2020>

‘Great Strides’: A Maritime Tourism Strategy 2020- 2025

https://scottishtourismalliance.co.uk/wp-content/uploads/2020/08/FINAL-Strategy-Document_Giant-Strides-2020-2025.pdf

HIE Adventure Tourism Research Report August 2015

<https://www.hie.co.uk/media/6144/adventure-tourism-in-scotland-final-report.pdf>

Highlands and islands Enterprise: Let’s grow adventure tourism

<https://www.hie.co.uk/support/browse-all-support-services/lets-grow-adventure-tourism/>

Valuing nature based tourism in Scotland Scottish Natural Heritage (2019)

<https://www.nature.scot/sites/default/files/2019-07/Valuing%20nature%20based%20tourism%20in%20Scotland.pdf>

VisitScotland Responsible Tourism Business Guide (March 2021)

<https://www.visitscotland.org/supporting-your-business/advice/coronavirus/responsible-tourism/responsible-visitor-guide>

VisitScotland Ayrshire & Arran Factsheet 2019 (January 2021)

<https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers-2/regional-factsheets/ayrshire-and-arran-factsheet-2019.pdf>

VisitScotland Insight Department: Trends 2020 Travelling Towards Transformational Tourism (February 2020)

<https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers-2/insights-trends-2020.pdf>

VisitScotland Responsible Tourism Business Guide (March 2021)

<https://www.visitscotland.org/supporting-your-business/advice/coronavirus/responsible-tourism/responsible-visitor-guide>

/

Appendix B: Stakeholder Consultees

Coastal North Carrick Consultancy: Stakeholder Interviews @ 25 March 2021		
Name	Organisation	Interview by / on
CONSULTEES (Target 25 / Actual 28)		
Public Sector		
Gordon Smith	VisitScotland (Regional Director)	KW 04-02-21
Sian Williams	Nature Scot (Ayr Office)	KW 08-03-21
Mark Stewart	EventScotland	KW 10-03-21
Adrian Browne	South Ayrshire Council Planning Department	KW 10-03-21
Fiona Ross	South Ayrshire Council(Neighbourhood Services)	KW 11-03-21
Abigail Coia	South Ayrshire Council	KW 01-03-21
Councillor Peter Henderson (SNP)	Girvan and South Carrick Ward / Leader of Council	KW 09-03-21
Councillor Siobhian Brown (SNP) [with Laura Kerr, Co-ordinator Culture & Sport]	South Ayrshire Council (Tourism Portfolio)	KW 17-03-21
Councillor Iain Campbell (Cons)	Maybole, North Carrick & Coylton	KW 02-03-21
Kevin Braidwood	Ayrshire Roads Alliance	KW 11-03-21
Community		
Janey McCreath	Kennedy Hall & Park Committee (Dunure Castle)	KW 03-03-21
Angus Craig	Dunure Community Council (and local farmer/landowner)	KW 04-02-21
Jane Lutz	KM&T Community Council	KW 02-03-21
Ian Campbell	Maidens Bowling Club	KW 03-03-21
Wendy McCrindle	Maidens Village Association	KW 04-03-21
James (Jim) Scott	Maidens Harbour Trust	KW 08-03-21
Mhairi Eaglesham	Dunure / Project Partnership Committee	KW 02-02-21
Mark Fletcher	Maybole, NCCBC, etc	KW 03-03-21
Celia Crawford	Turnberry Resident	KW 11-03-21
Chris Hanna	Girvan Community Tourism Project	KW 18-03-21
Private Sector (Business)		
Daniel Steel	COIG	KW 08-03-21
Gareth Clingan Operations Manager	Culzean Castle & Country Park	KW 03-03-21
Chris Savage Factor (contact for Lord David Kennedy)	Culzean Cassilis and Blenheim Estates	KW 04-03-21
Nicola Sage	Wildings Hotel & Restaurant	KW 09-03-21
Stuart Andrew	Pirleyhill Farm & Pods	KW 04-03-21
Caryn Inglis	A D Rattray Whisky Tastings	KW 04-02-21
Ralph Porciani	General Manager, Trump Turnberry Hotel	KW 10-03-21
Chris Saunders	Adventure Carrick	KW 25-03-21
Leslie McFadzean	KM&T Community Council, NCCBC	Email response / declined interview
Cameron Kerr	Dunure Harbour Committee	Not Available (Alternate contact being sought)

Appendix C: Stakeholder Interview Proforma Template



Wardrop Consulting



Stakeholder Interviews Pro forma

Developing and Managing Tourism in Coastal North Carrick

Name:		
Organisation:		
Date of Interview:		
Person Conducting Interview:		
Q1	If a local representative which geographic location are you in Dunure & Fisherton / or Kirkoswald Maidens & Turnberry	
Q2	What do you think is the main market appeal for visitors to the area (visitor profile & motivation to visit)?	
Q3	What do you consider to be the key assets (strengths) of the destination?	
Q4	What do you consider to be the key tourism destination opportunities for the community / the destination?	
Q5	What do you consider to be the key challenges or issues facing the destination?	
Q6	What are the barriers to realising the future development aspirations for the destination (community)?	
Q7	What should be the primary objective of future tourism related investment in the community?	
Q8	What do you think is the top priority for tourism in this destination (community)?	
Q9	Is there a particular stakeholder (individual or organisation) that is critical to realising the tourism (community) aspirations?	
Q10	Any other relevant points or observations?	

Kenneth Wardrop BA (Hons) MBA
Wardrop Consulting

Kenneth Wardrop BA (Hons) MBA
Wardrop Consulting (<https://www.linkedin.com/in/kennethwardrop/>)
Email: kennethwardrop@gmail.com
Mobile: 07557 735531

Benjamin Carey FTS (<https://www.linkedin.com/in/benjamincarey1/>)
Carey Tourism (<https://www.careytourism.com/>)
Email: benjamin@careytourism.com
Mobile: 07974 577476

31 March 2021