

# Loch Lomond & The Trossachs National Park Consumer perceptions

Presentation of research findings

*Prepared for:*

Loch Lomond & The Trossachs National Park Authority

July 2014



Background



# Research objectives

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- ✦ The main aim was establish awareness and perceptions of Loch Lomond and The Trossachs National Park.
- ✦ Specific objectives were to determine
  - spontaneous and prompted awareness
  - reasons for visiting / not visiting LLTNP
  - understanding of the National Park status
  - perceptions of LLTNP's aims
  - concern for the areas of conservation represented by the 5 wild challenges.

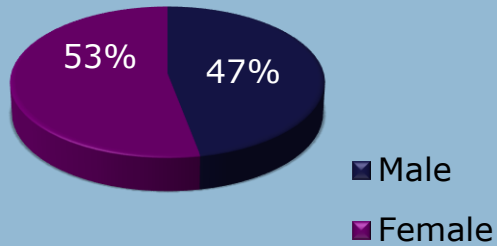
# Methodology and sample

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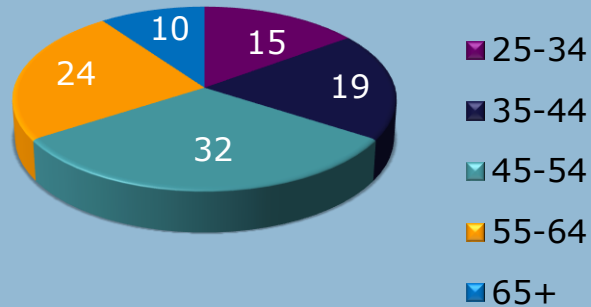
- ✦ Ad hoc survey, described as being about 'the countryside'
- ✦ Online methodology using a Scottish panel
- ✦ Sample (no specific quotas set)
  - ABC1C2
  - aged 25+
  - living within 1 hour's drive of LLTNP
- ✦ 10 minute questionnaire
- ✦ Total of 790 responses received

# Sample profile

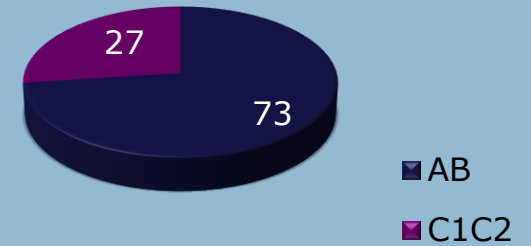
## Gender



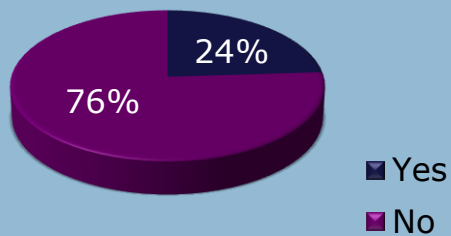
## Age



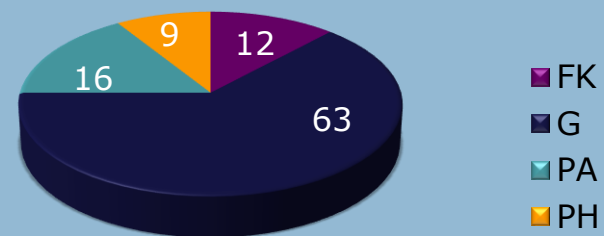
## SEG



## Children in household

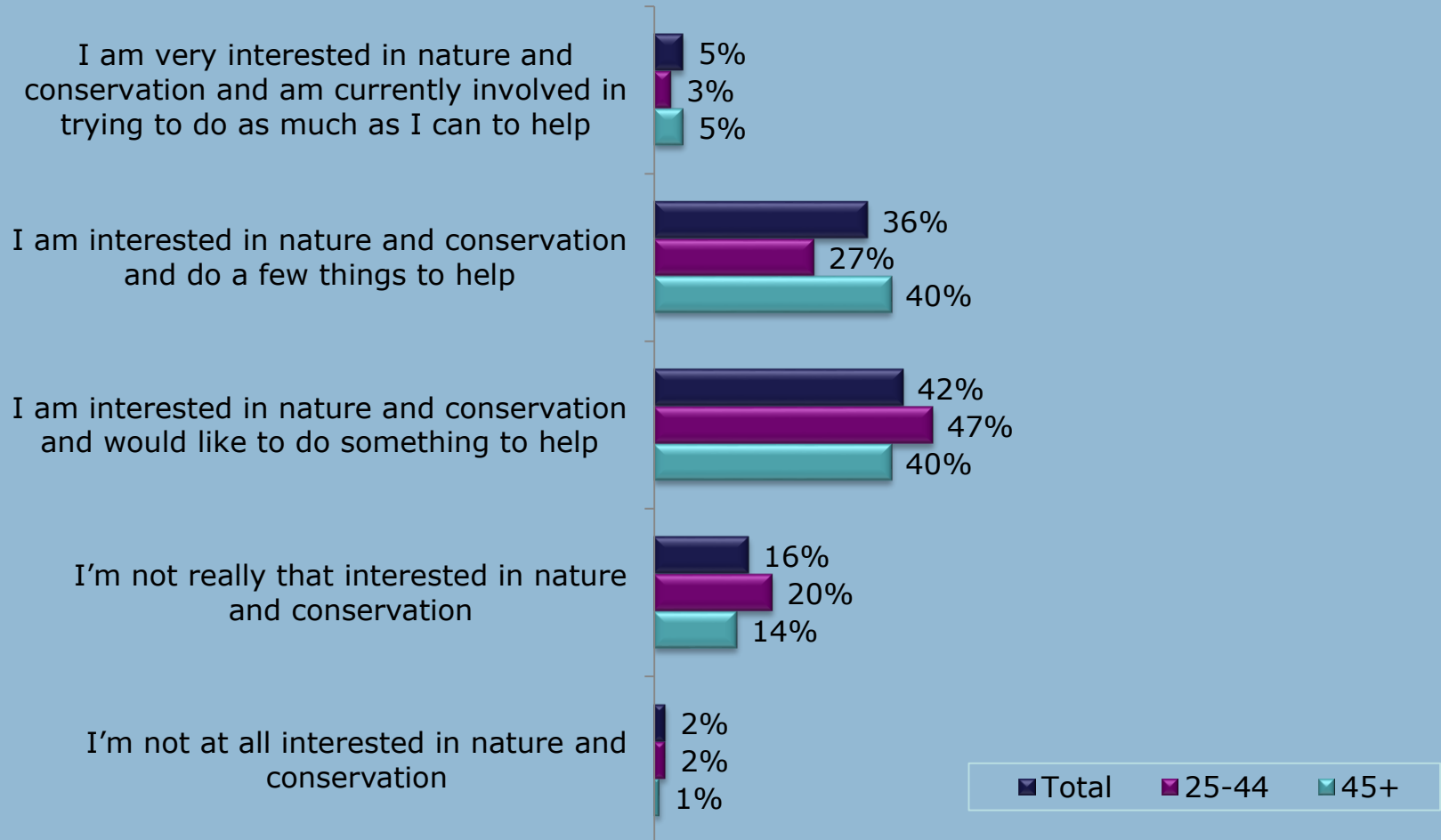


## Location (postcode areas)



# Sample profile

## - interest in nature and conservation -



Q11a Which of the following best describes you?  
 Base: All respondents; n = 790

# Sample profile

## Conservation / nature activities involved in

	<b>Total</b>	<b>25-44</b>	<b>45+</b>
	<b>652</b>	<b>207</b>	<b>445</b>
	<b>%</b>	<b>%</b>	<b>%</b>
Doing things in my garden to make it wildlife friendly	67	58	71
Regularly visiting places (e.g. visitor centres) that provide opportunities to learn more about and experience nature	48	55	46
Going to nature led events (e.g. walks, talks)	33	36	31
Recording / monitoring wildlife in my garden	31	26	34
Being a member of / supporting a conservation charity	20	21	22
Adopting / sponsoring an animal, etc.	19	27	16
Teaching others about the importance of nature and conservation	17	16	17
Being involved in a voluntary conservation project	17	18	16
Recording / monitoring wildlife in the countryside	13	14	12
Promoting conservation through my business / work	10	13	8
Raising funds to support nature conservation	6	5	6
Other	2	2	2
Don't know	5	4	5

Q11b What kinds of things are you doing /would you like to be involved in?  
Base: All respondents; n = 790

# Awareness and perceptions of LLTNP

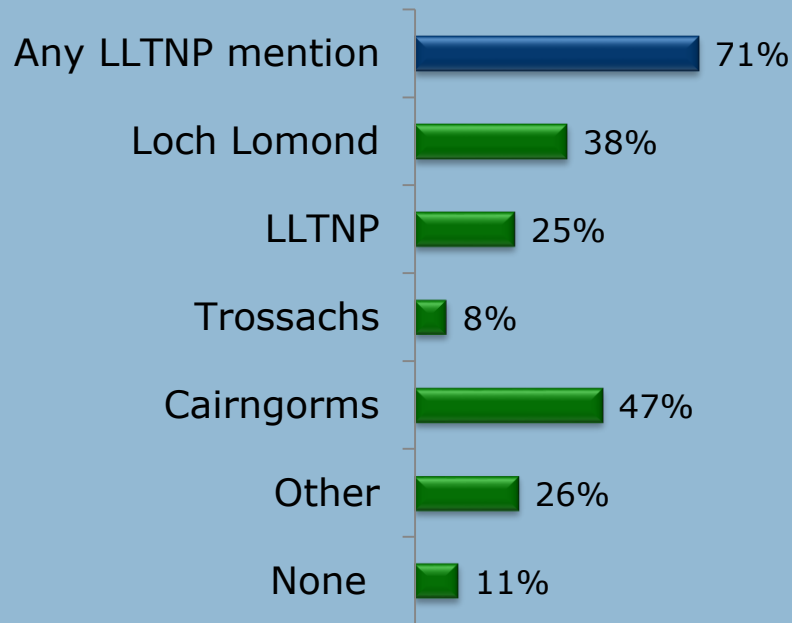




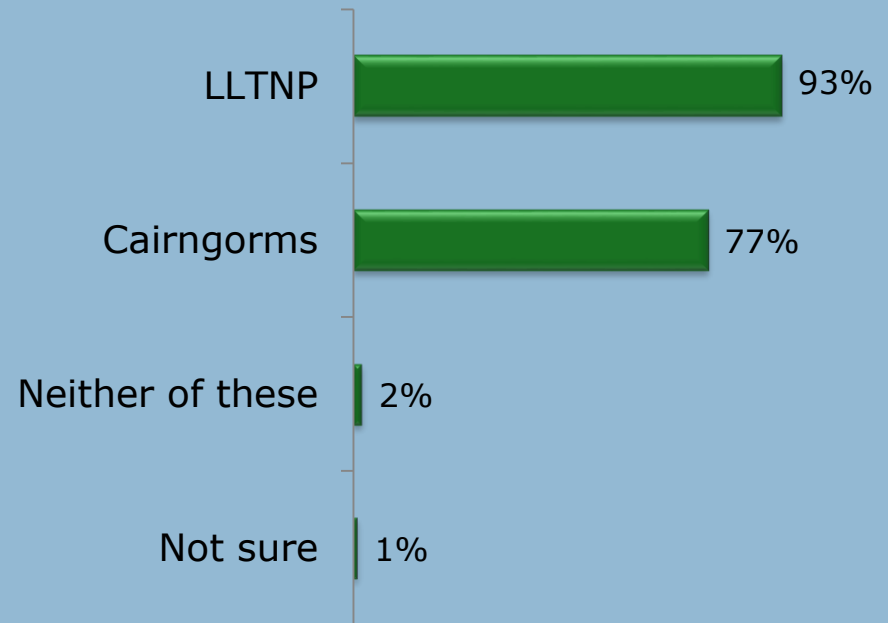
# Awareness of Loch Lomond and The Trossachs National Park

LLTNP has a high level of top of mind awareness - with almost three quarters of this audience mentioning it spontaneously – and significantly higher than the Cairngorms National Park. This rises to 93% at a prompted level. Given the proximity of LLTNP to their place of residence, this is perhaps not surprising.

## Spontaneous



## Prompted



Q1a Which National Parks, if any, are you aware of in Scotland?  
Base: All respondents; n = 790

Q1b Which of these National Parks, if any, are you aware of in Scotland?  
Base: All respondents; n = 790

# Awareness of Loch Lomond and The Trossachs National Park

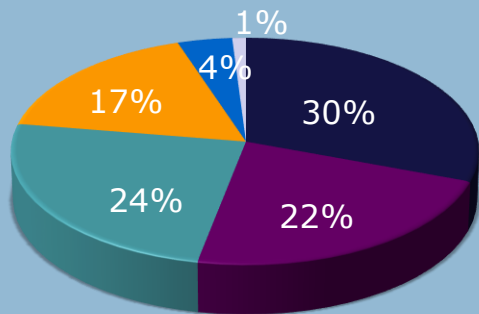
## Profile of those mentioning LLTNP spontaneously

<b>Gender</b>		
Male	%	75
Female	%	66
<b>Age</b>		
25-44	%	65
45+	%	73
<b>SEG</b>		
AB	%	72
C1C2	%	66

<b>Visited LLTNP</b>		
Yes	%	80
No	%	49
<b>Location</b>		
FK	%	73
G	%	71
PA	%	73
PH	%	58

# Visits to Loch Lomond & The Trossachs National Park

## Frequency of visits in last 12 months



- Not visited at all
- Visited once
- Visited 2-4 times
- Visited 5+ times
- I live in the Park area
- Not sure

Profile				
		Not visited	Visited once	Visited 2+ times
<b>Gender</b>				
Male	%	28	23	43
Female	%	32	22	41
<b>Age</b>				
25-44	%	30	25	40
45+	%	30	21	43
<b>SEG</b>				
AB	%	28	22	45
C1C2	%	37	24	34
<b>Location</b>				
FK	%	37	21	40
G	%	28	22	44
PA	%	24	24	46
PH	%	49	25	23

Q2 How often have you visited Loch Lomond & Trossachs National Park area in the last 12 months?  
Base: All respondents; n = 790

# Main reasons for visiting LLTNP

	<b>Total 508 %</b>
Day out	76
Scenery	54
Countryside	39
Sightseeing	36
Rambling/walking	28
Being amongst nature	25
Picnic	21
Hill walking	15
Wildlife	14
Boat trip	10
Bird watching	6
Camping	6
Cycling	4
Golf	3
Fishing	3
Other	18

# Reasons for not visiting LLTNP

	<b>Total 240 %</b>
Never thought about it	29
Don't know what I could do there	14
Hard to get to	12
Too far away	11
Prefer somewhere closer to home	10
No time / too busy	10
Prefer somewhere else	8
Didn't know about it	5
It's too busy / too many people there	5
I don't like the behaviour of some of the people who go there	5
Ill-health / disability	3
Not interested in the countryside/nature	3
Nothing for the kids to do	2
There's too much litter lying around	2
No transport / don't drive	2
Been there before	2
Other	10

# Understanding of 'National Park'

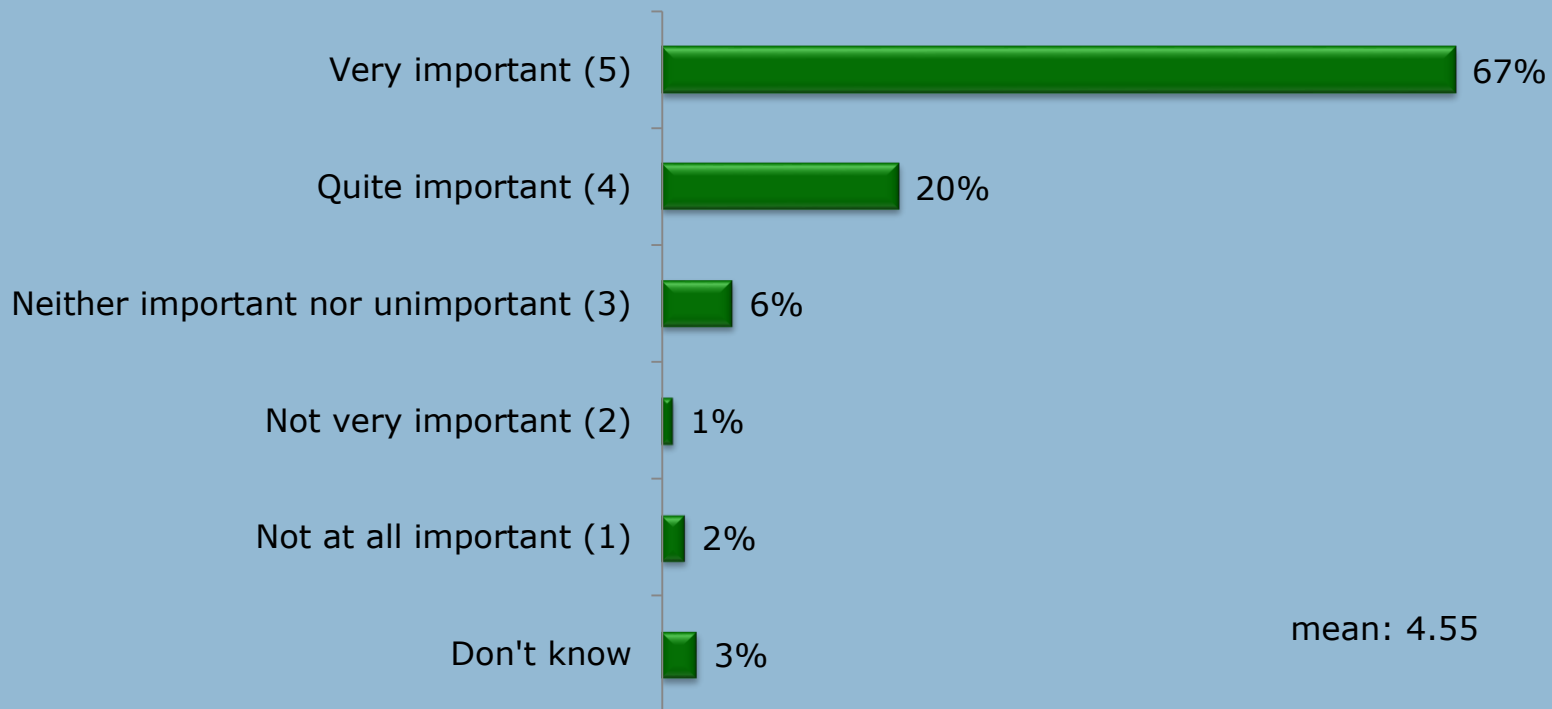
	<b>Total 790 %</b>
<b>Conservation</b>	
Protected /preserved / conservation area / environment	31
Flora and fauna are protected / allowed to thrive	2
Place of special significance / interest	2
Kept for future generations / for posterity	2
<b>Natural environment</b>	
Place of natural beauty / scenery	19
Nature / green space / countryside /lots of tree, plants ...being in it / ...where it can be appreciated, etc.	6
Rich in wildlife / ...allowed to thrive there	6
Open space / freedom to explore	5
Unspoilt / wilderness	4
Fresh air / no pollution	2

# Understanding of 'National Park'

	<b>Total 790 %</b>
<b>Visitor facility</b>	
Accessible / open to everyone (for free)	14
Facilities / amenities provided for visitors	6
Peace and quiet / tranquillity / somewhere where you can relax	5
Lots of walks / paths / trails to follow	5
Tourist attraction	2
Good day out / place to take the family, etc.	2
<b>Managed</b>	
Managed / looked after / ...by park rangers, etc.	12
Planning restrictions / protected from development, commercialism	11
Government (agency) owned / run / funded	3
<b>Other</b>	
It belongs to us / ...the people / ...the nation	3
Large area / vast / bigger than a regional park	3
Other	4
Don't know	11

# Importance of National Park status

Two thirds of the sample felt that it was very important that LLTNP has National Park status. This is significantly higher amongst those who had visited the Park (74% compared with 52% of those who had not), and highest amongst those who had visited more regularly (77% of those who have visited more than once, compared with 68% of those who had made only 1 visit).

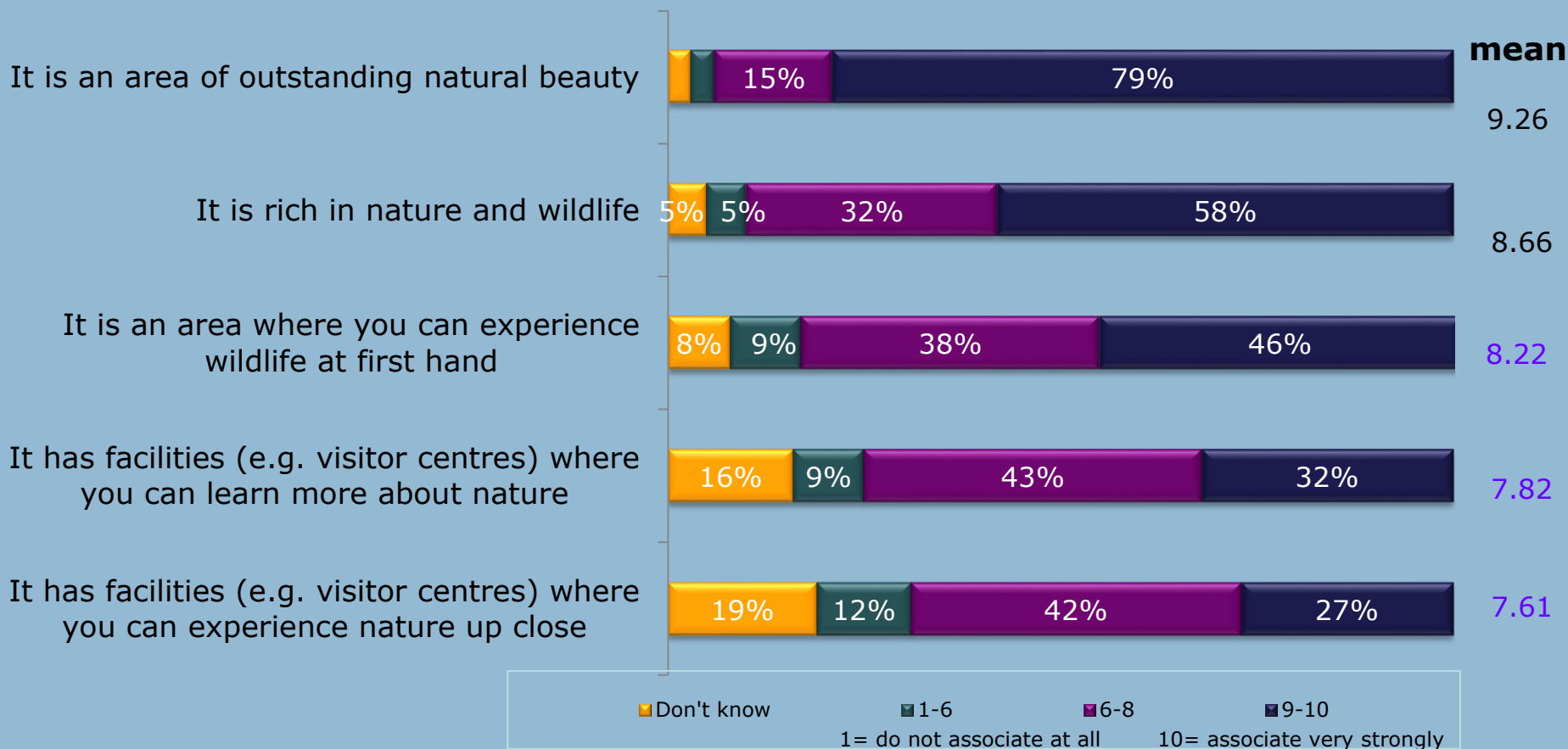


Q4b And how important do you think it is that the Loch Lomond and Trossachs area has a National Park status?  
Base: All respondents; n = 790



# Attributes associated with Loch Lomond and Trossachs National Park

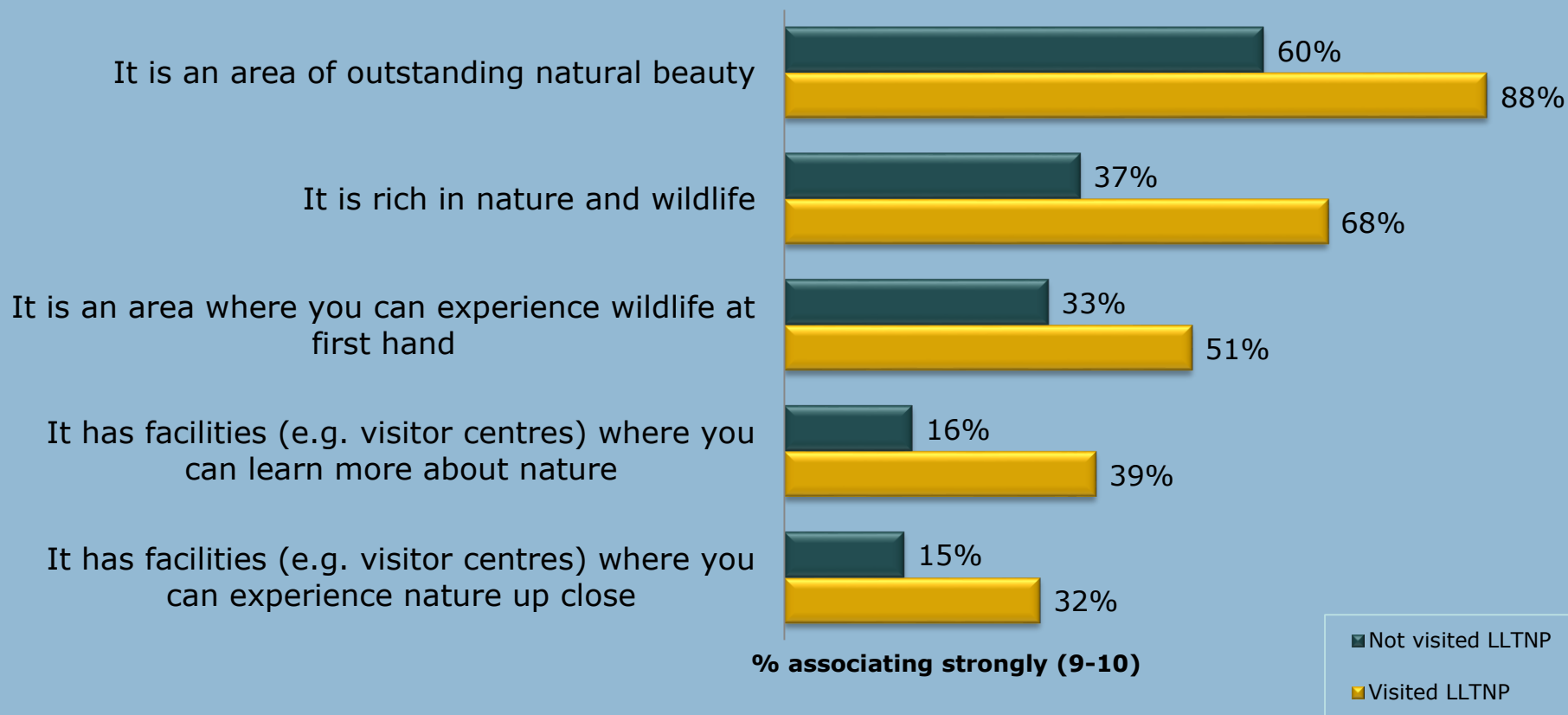
Whilst the National Park is strongly associated with being an area of outstanding beauty, significantly fewer people strongly associated it with being a place where you can experience wildlife first hand, and significantly fewer still with providing facilities where visitors can experience and learn about nature.



Q5 To what extent do you associate each of these statements with LLTNP?  
Base: All respondents; n = 790

# Attributes associated with Loch Lomond and Trossachs National Park

The level of strong association with each of the attributes was significantly lower amongst those who had not visited the National Park in the last 12 months. In particular, the proportion of this segment who strongly associated it with providing facilities where visitors can learn about and experience nature up close was less than 20%. This may account in part for the lack of consideration of the Park as a place to visit.



Q5 To what extent do you associate each of these statements with LLTNP?

Base: All respondents in each segment; those who had visited n = 540, those who had not visited n=240

# Additional facilities sought

An interest in seeing more visitor facilities in the National Park was expressed by both those who had visited in the last year and those who had not (although significantly more so by the former).



Q9 Which of the following would you like to see more of in Loch Lomond and The Trossachs National Park?

Base: All respondents in each segment; total n = 790, those who had visited n = 540, those who had not visited n=240

# Understanding of aims of LLTNP



# Perceived aims of Loch Lomond and Trossachs National Park (spontaneous)

	<b>Total 790 %</b>
<b>Conservation / protection</b>	<b>40</b>
Wildlife protection / preservation / ...and habitat	14
Protection of area / environment	14
Preservation / conservation of area / environment	12
Maintain the natural beauty / scenery	11
Keep for future generations / for posterity	4
Flora and fauna protection / allow to thrive	2
Keep it unspoilt / as nature intended	2
<b>Provide facilities for visitors</b>	<b>46</b>
Attract tourists / visitors	17
Make it accessible / open to everyone (for free)	10
Provide facilities / amenities / activities for visitors	9
Make it enjoyable / good day out / place to take the family, etc.	7
Bring people closer to nature / ...chance to experience it, etc.	7
Provide walks / paths / trails to follow	2
Provide haven of peace and tranquillity /somewhere to relax	2
Provide safe area / somewhere safe to visit	2

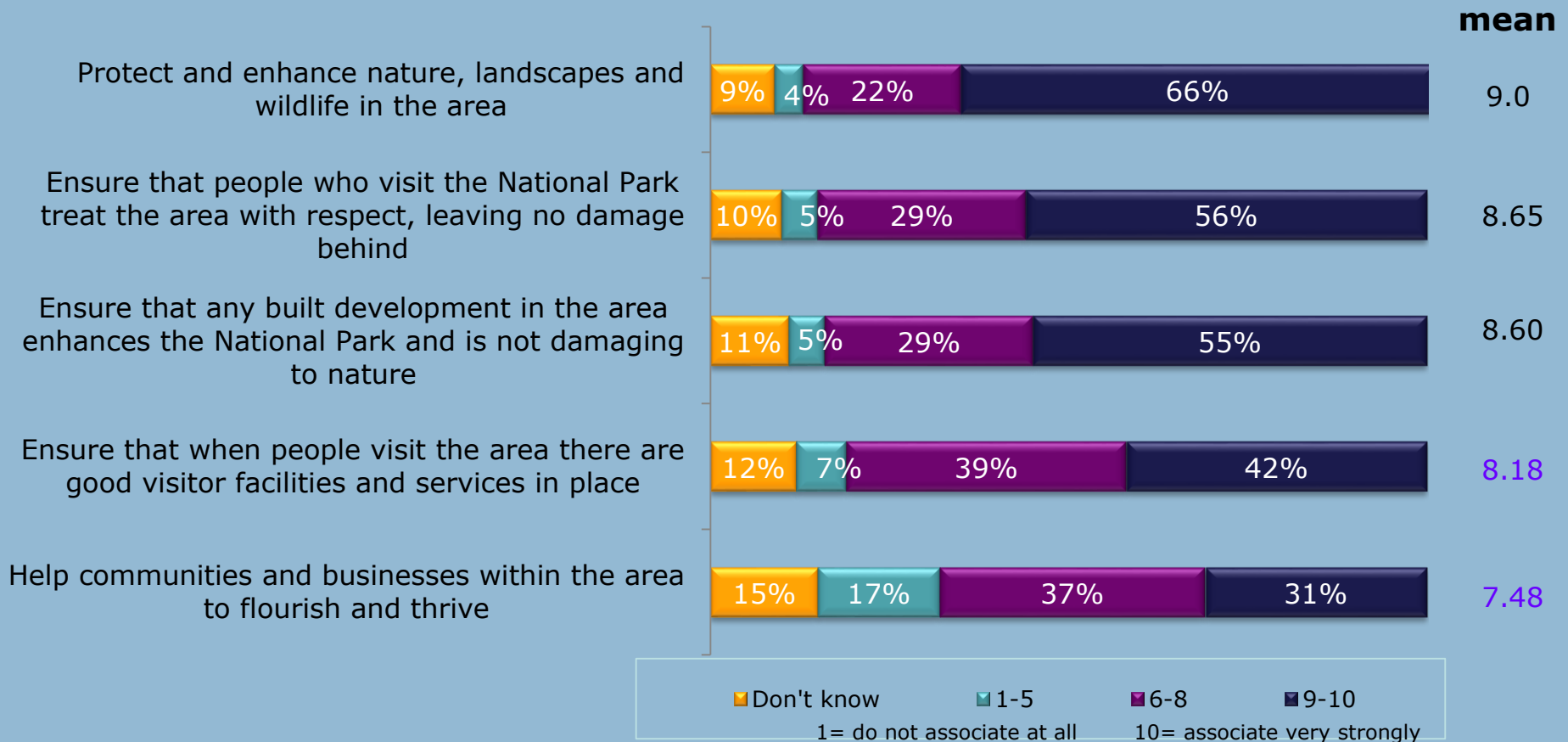
# Perceived aims of Loch Lomond and Trossachs National Park (spontaneous)

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	<b>Total 790 %</b>
<b>Education</b>	<b>20</b>
Educate / inform people about the area, wildlife, etc.	20
<b>Other</b>	
Enforce rules & regulations / responsible use / the 'country code	2
Showcase the area / country / ...at its best	2
Manage / look after / ...by park rangers, etc.	7
Control development / make it sustainable, etc.	4
Other	14
Don't know	17

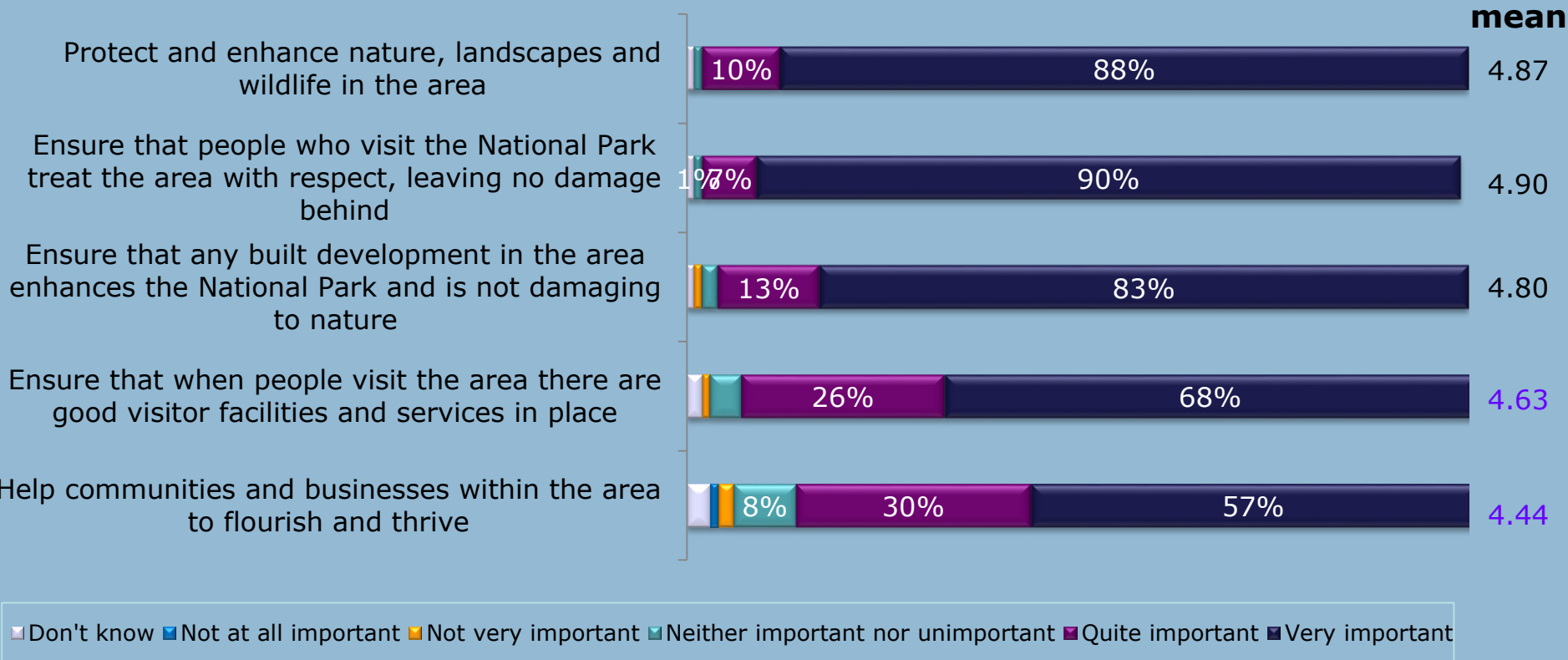
# Level of association with Loch Lomond and Trossachs National Park aims

On prompting, the strongest levels of association are with aims which relate to protecting and enhancing nature and the environment of the National Park. Whilst still enjoying high levels of association, those aims which relate to visitor experience and rural development are less strongly linked with what the Park Authority sets out to do.



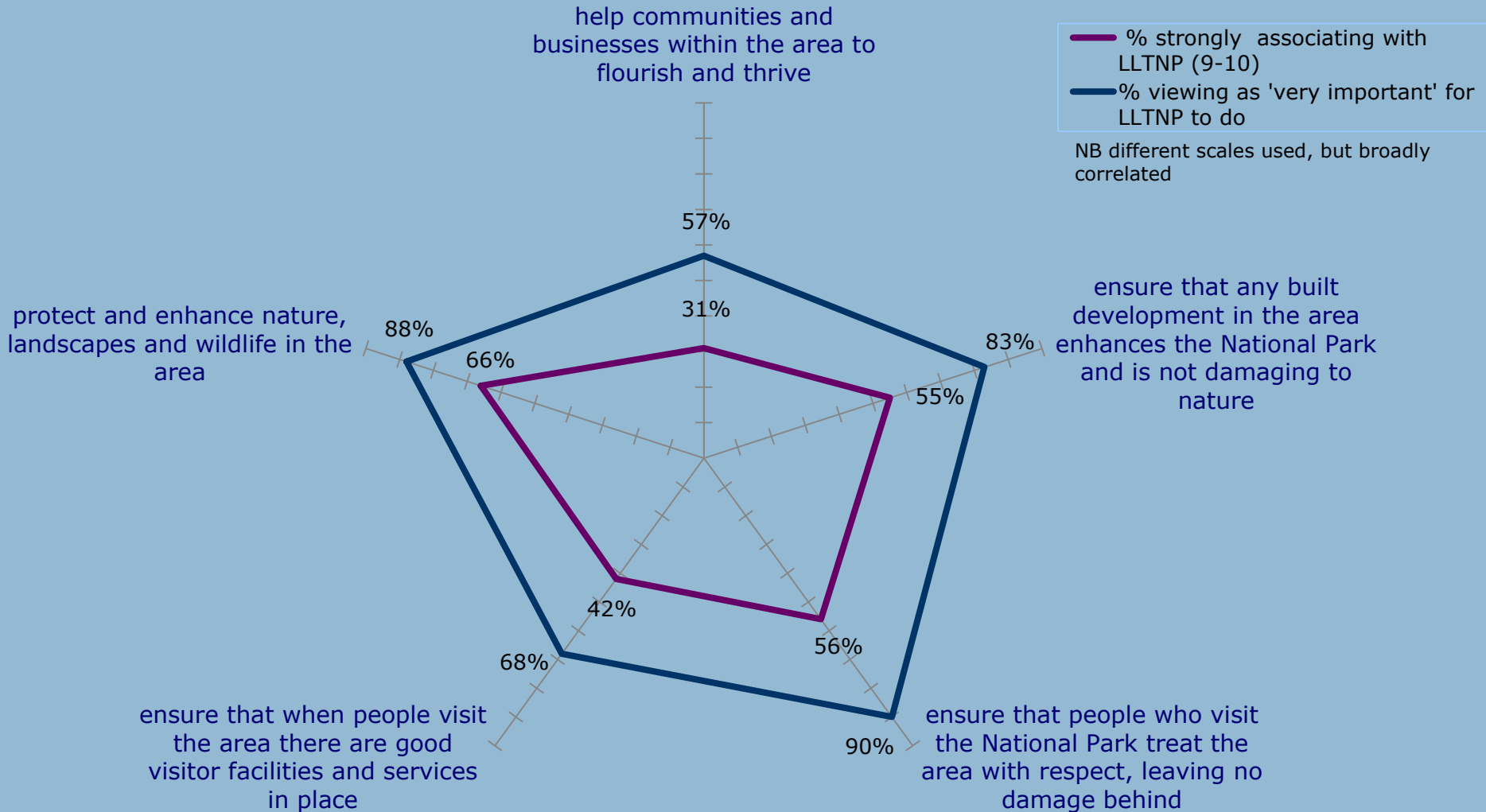
# Perceived importance of Loch Lomond and Trossachs National Park aims

A high level of importance is attached to all of the LLTNP's aims, although again the ones relating to nature are rated significantly more highly. Protection of the environment of the National Park from damage by visitors and development is viewed as being of high importance. Visitors were significantly more likely to score the conservation / protection aims as very important.





# Association vs importance of aims



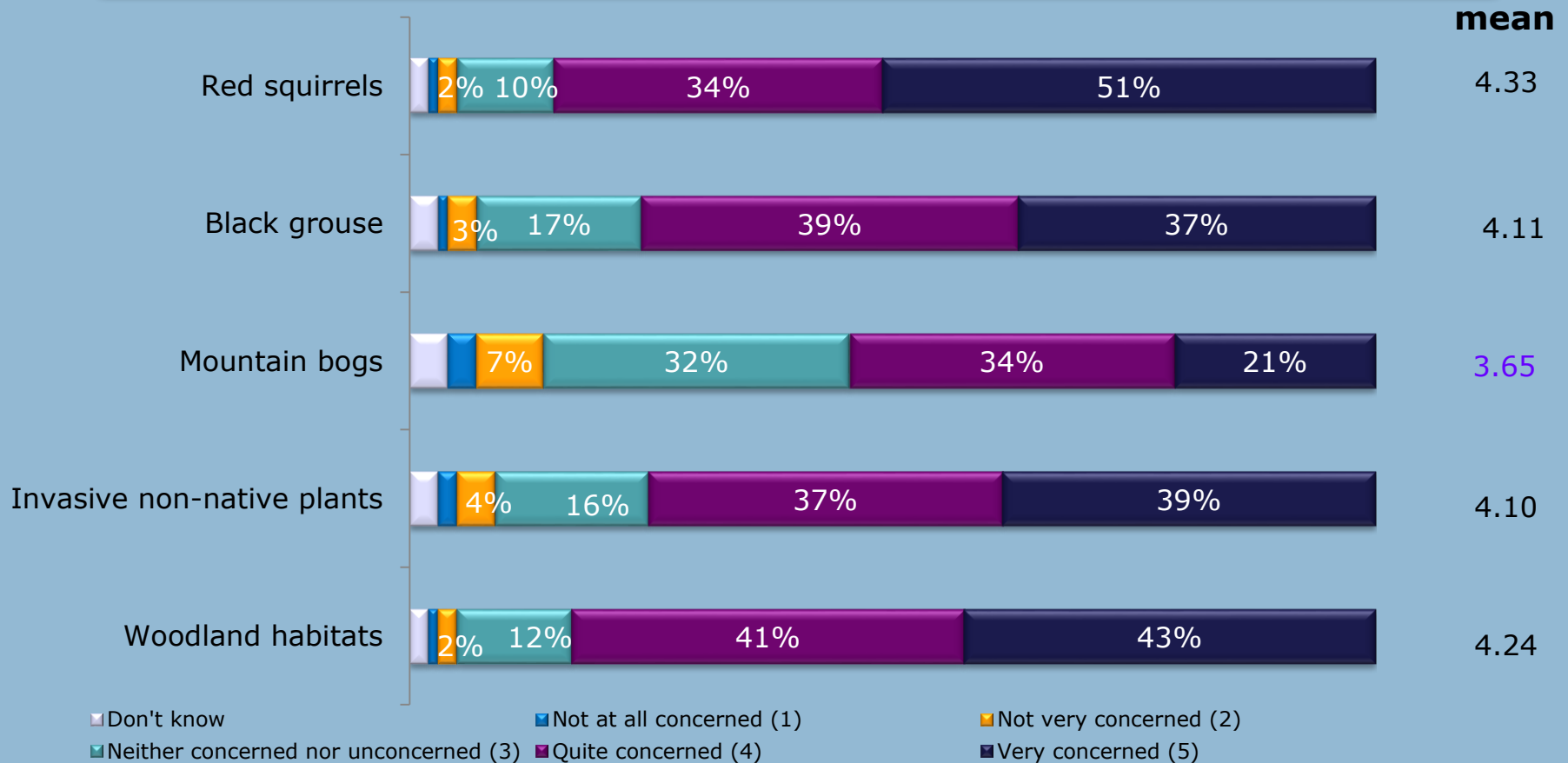
Q7 How strongly do you personally associate with LLTNP...?

Q8 How important do you think it is for LLTNP to...?

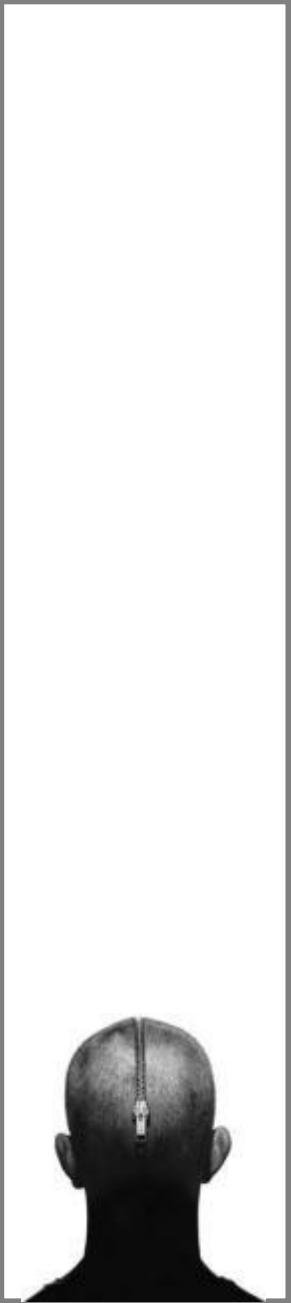
Base: All respondents; n = 790

# Level of concern over Wild Challenge priorities

Overall, there was a good level of concern over the five areas of conservation represented by the Wild Challenges, with the highest level of concern registered being for red squirrels. The AB segment showed significantly greater levels of concern for red squirrels, black grouse and woodland habitats.



# Conclusions



# Conclusions

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- ✦ Awareness of LLTNP is high amongst this 'close proximity' audience, with two thirds having visited in the last 12 months
  - awareness is significantly lower amongst the under 45s, and those living in the PH postcode area
  - significantly fewer visitors were from the C1C2 socio-economic group, and from the PH postcode area.
- ✦ The key reasons highlighted for not visiting the National Park were the fact that it is not top of mind, and a lack of awareness of the facilities available for visitors. This indicates a need for targeted marketing activity, particularly outwith the Park's immediate vicinity.
- ✦ Understanding of the significance of being a National Park focused on its conservation role, with only a minority spontaneously linking it with providing access and facilities for the public. This perception may in part be responsible for failure to investigate activities that are offered in the Park area.

# Conclusions

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- ✦ At a prompted level, the National Park is still most strongly associated with being an area of outstanding beauty that is rich in nature. It is less strongly linked with the provision of visitor facilities - this perception is particularly evident amongst those who have not visited in the last year, again indicating a role for marketing activity.
- ✦ Spontaneous perceptions of the aims of LLTNP focused on three key areas: conservation, provision of access and facilities for the public, and education.
- ✦ The future conservation focus represented by the 5 wild challenges was well received overall, although personal levels of concern in respect of each of the wild challenges varied with red squirrels engaging most, and mountain bogs least, strongly.
- ✦ Over half of the respondents expressed a desire for more visitor facilities to be made available within LLTNP, alongside more conservation work from both experts and volunteers.

# Conclusions

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- ✦ Whilst all of LLTNP's aims were viewed as being of importance, those receiving the highest scores for importance related to the National Park's conservation aims (protecting and enhancing nature and wildlife, and ensuring visitors do not damage the area)
  - visitor experience and rural development aims, whilst still important, were seen as secondary to conservation.
- ✦ The 'gap' between the perceived importance of, and association with each of these aims indicates that there is an opportunity to further raise awareness of LLTNP's aims through active marketing in this area. This will provide the chance to focus on messaging relating specifically to those areas of the National Park Authority's work which are of greatest importance and resonance to the public.