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Loch Lomond & The Trossachs National Park

## Non-visitor research

Presentation of findings

31<sup>st</sup> October 2017



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# Research objectives



## Background

- LLTNP identified a challenge in promoting the Park – not attracting a higher volume of visitors, but:
  - attracting **more overnight visitors**
  - encouraging people to visit locations **beyond the high volume honey-pot sites**.
- LLTNP wanted insight into non-visitors – identifying barriers to visit, gaps in the tourism product, destination awareness and perceptions.
- Focused on **visitors to popular areas (Balloch, Balmaha, Luss and Callander) who do not venture further into the Park** – ‘non-visitors’ refers to people who visit the main honey-pot locations but do not visit other parts of the Park or stay overnight.
- Insights will be used to ensure marketing communications are focused on key markets and able to promote areas of the Park that are less well visited.



## Aims and objectives

- The study aimed to engage with non-visitors who do not travel further into the Park or stay overnight, and provide meaningful insights into their motivations and behaviours. This included a focus on:
  - Demographic profile of non-visitors
  - Key factors taken into consideration and sources of information used when choosing a location to visit for a day trip, short break or holiday in Scotland
  - Why honey-pot sites are attracting such high volumes of day visitors (rather than longer visits and/or going to other parts of the Park)
  - Whether anything is actively discouraging people from visiting other parts of the Park, or if it is lack of awareness of other places to visit
  - Attributes associated with the National Park, if any, and how important National Park status is
  - Intentions to visit the National Park in the future.

# Method & sample

## Quantitative research

- Face-to-face CAPI survey.
- Target audience = those who were visiting the 'honey-pot' locations but had not visited anywhere else in the Park, or stayed overnight in the Park, in the last 2-3 years.
- Random sampling applied – no quotas.
- Fieldwork conducted between 9th September and 8th October 2017.
- 381 interviews achieved – sample provides a dataset with a margin of error of between  $\pm 1.00\%$  and  $\pm 5.02\%$ , calculated at the 95% confidence level (market research industry standard).
- All fieldwork undertaken in accordance with the requirements of ISO 20252 and the MRS Code of Conduct.

## Limitations

- Please note that sample sizes at Luss and Callander are quite small – results for these locations should therefore be treated with caution.
- Fieldwork was also undertaken outside of the peak visitor season, which may have affected the findings.



## Achieved sample

Sample location	Interviews	% of sample
Balloch	140	37%
Balmaha	114	30%
Luss	71	19%
Callander	56	15%
<b>Total</b>	<b>381</b>	<b>100%</b>

## Finding non-visitors

- It is worth noting that it was quite difficult to find non-visitors – numbers of people who screened out of the survey are identified below for each location.
- While not intended to be an accurate calculation of visitor/non-visitor proportions, it gives an indication of how many people were ineligible for interview because they were residents, had visited other areas or were staying overnight in the Park. This may partly be a reflection of the time of year.

Sample location	Interviews	Screen-outs
Balloch	140	157
Balmaha	114	423
Luss	71	139
Callander	56	67
<b>Total</b>	<b>381</b>	<b>786</b>

# Sample profile

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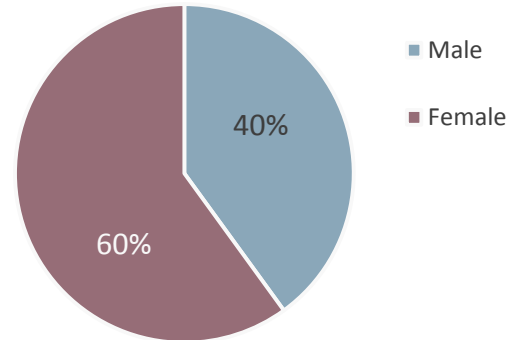
# Sample profile – demographics

- 60% of the sample were female, 40% were male.
- There was a fairly broad spread of ages across the sample as a whole – 27% were aged 16-34, 34% were aged 35-54 and 38% were aged 55. The age profile among Scottish visitors was very similar to the population as a whole based on Census 2011 figures.
- Almost six in ten (57%) were from Scotland. A further fifth (19%) were from the rest of the UK, 12% were from Europe and 12% from elsewhere in the world. Compared to VisitScotland figures for visitors to Scotland as a whole, this is a higher proportion of Scottish visitors (generally 35-40%) and fewer from RoUK (generally around 40%).
- Scottish respondents tended to be based in and around the west central belt, but a wide range of locations were mentioned.
- The most common countries represented were:
  - USA (13 respondents)
  - Australia (13)
  - Germany (10)
  - France (8)
  - Canada (7).

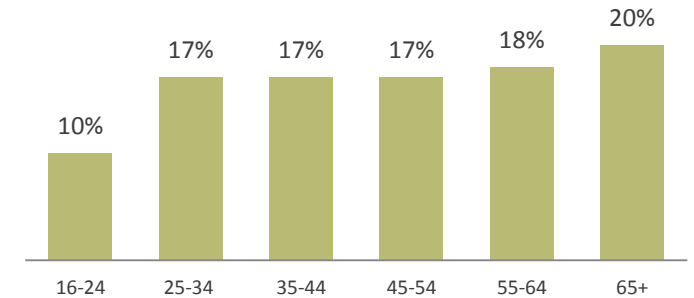
## Age, gender, location



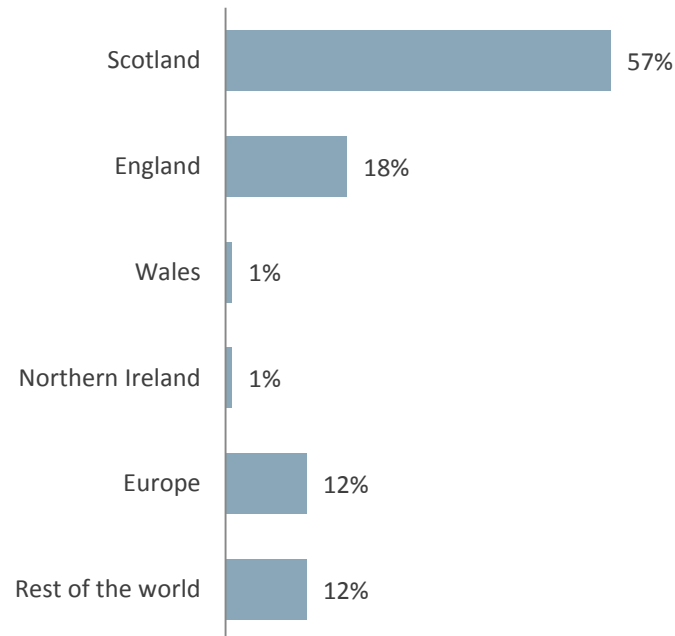
Gender



Age group



Location

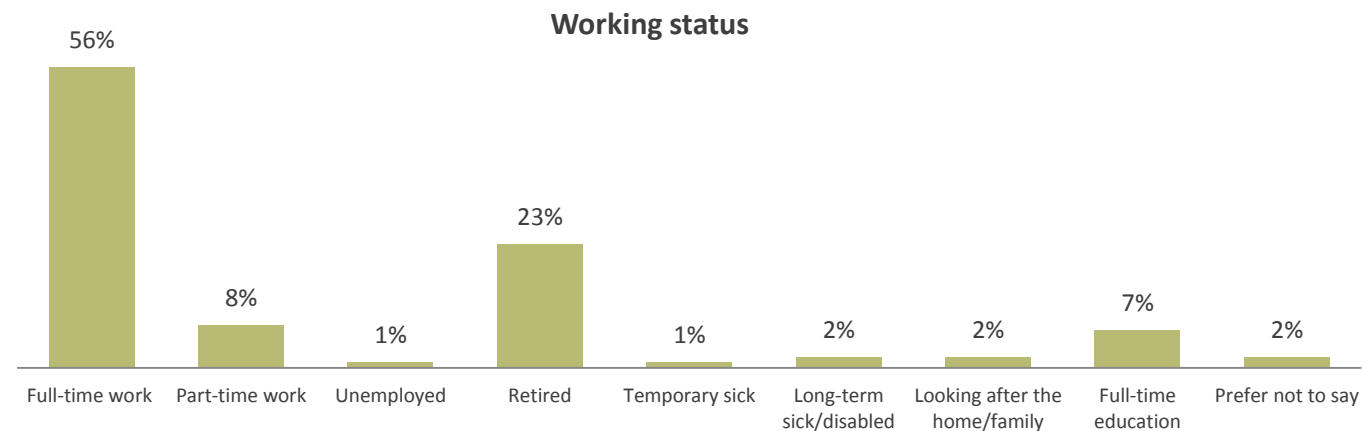
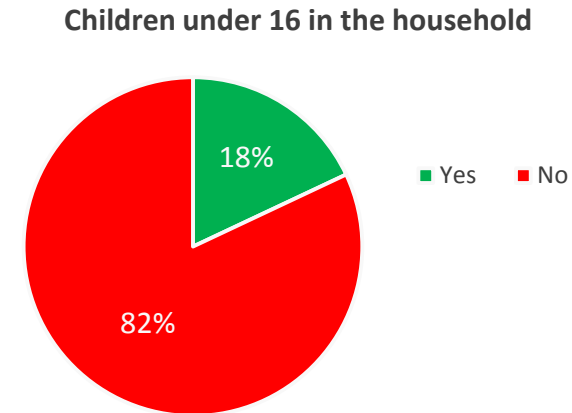
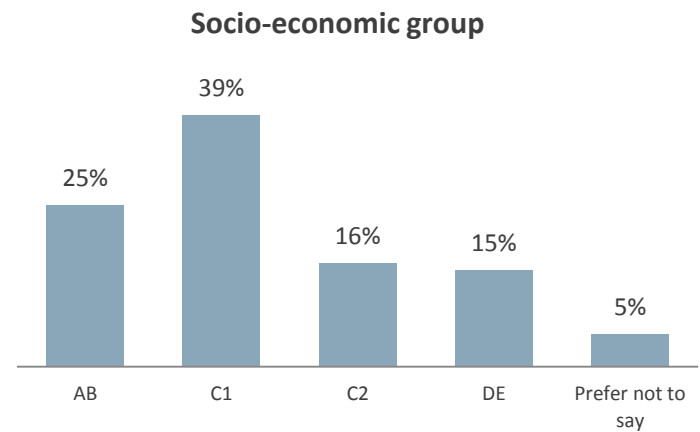


Most common Scottish locations	No.
Glasgow (unspecified)	62
Dumbarton	13
Edinburgh	10
Alexandria	9
Clydebank	9
Stirling	7
Aberdeen	6
Ayrshire	6
East Kilbride	6
Helensburgh	6
Base	219

# Sample profile – demographics

- Respondents tended to be in the higher socio-economic groups ABC1 (64%), with relatively few in the C2DE group (31%).
- This is higher than the Scottish population as a whole (45% ABC1, 55% C2DE) – although this proportion was slightly closer to the national average among Scottish residents (59% ABC1) compared to those from other countries (77% of Europeans and 84% of rest of the world respondents fell into the higher SEGs).
- Reflecting the slightly older age profile of the sample, just under a fifth (18%) had children in the household but the majority did not (82%).
- Respondents were most likely to be in full time work (56%), and around a quarter (23%) were retired.

## SEG, working status, children



# Sample profile – by location

- Sample profiles varied slightly between locations, although small base sizes at Luss and Callander should be borne in mind.
- Balloch and Balmaha attracted younger visitors, while Luss and Callander attracted older age groups.
- Those at Balloch and Luss tended to be from Scotland, while Callander attracted more visitors from the rest of the UK and Balmaha had the most international visitors.
- Reflecting this origin profile, visitors to Balloch and Luss tended to be on a day trip whereas those at Balmaha and Callander tended to be on a longer break.



Visitors tended to be...	Balloch
Younger	31% 16-34
On a short outing from home	46% on <3 hr outing
Local	69% live in Scotland
<b>Base</b>	<b>140</b>



Visitors tended to be...	Luss
Older	55% 55+
On a short outing from home	35% on <3 hr outing
Local	61% live in Scotland
<b>Base</b>	<b>71</b>



Visitors tended to be...	Balmaha
Younger	35% 16-34
On a longer holiday	44% 4+ nights
International	25% Europe, 18% Rest of world
<b>Base</b>	<b>114</b>



Visitors tended to be...	Callander
Older	68% 55+
On a longer holiday	43% 4+ nights
Non-Scottish domestic visitors	30% RoUK
Without children in the party	96% no children
<b>Base</b>	<b>56</b>





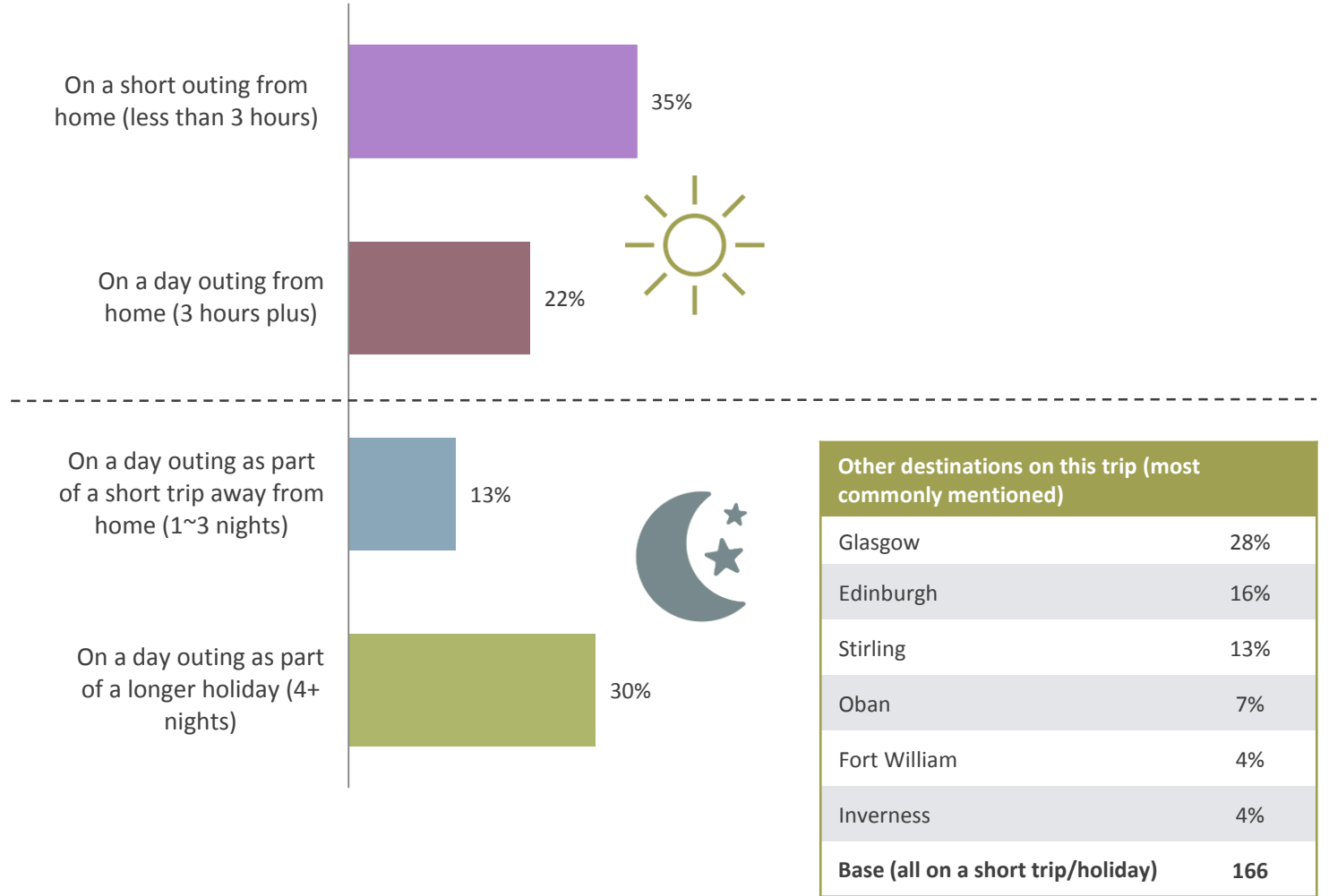
# Type of visit



# Type of visit

- Respondents were more likely to be day trippers (56%) than holiday makers (44%) – and this tended to be a shorter day trip (35% were on an outing from home of less than 3 hours).
- Visitors interviewed at Balloch were most likely to be on a short/day outing from home (76% v 56% average) while those at Balmaha were most likely to be on an outing as part of a short break or holiday (61% v 44% average).
- Among those on a day outing as part of a short trip or longer holiday, the most common other destinations on their trip were Glasgow, Edinburgh or Stirling.

## Type of visit – day trips & holidays



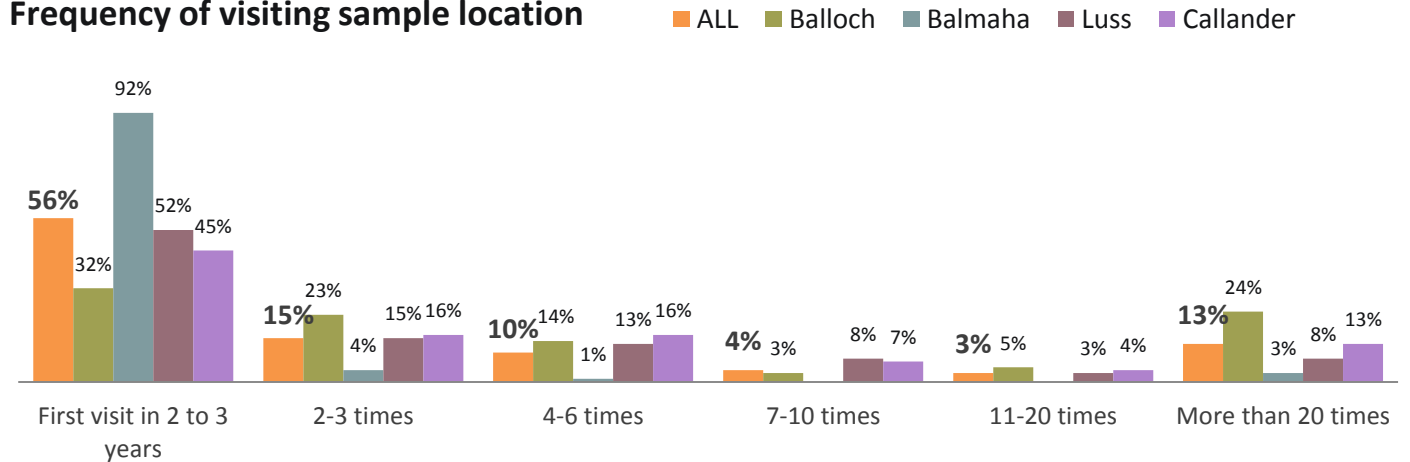
# Frequency of visits

- Respondents were asked how many times they had visited **this particular location** within the last 2-3 years.
- Overall, just over half (56%) were on their first visit in the last 2-3 years, although around a fifth (19%) said they had visited 7+ times (and 13% had visited more than 20 times).
- However, responses varied by location, with those interviewed at Balmaha being more likely to be on a first visit and those at Balloch more likely to have been 20+ times.
- Perhaps unsurprisingly, respondents living in Scotland were more likely to be making a repeat visit than any other group (64%, compared to 25% of Rest of UK, 18% of Europeans and 7% of those from the rest of the world).

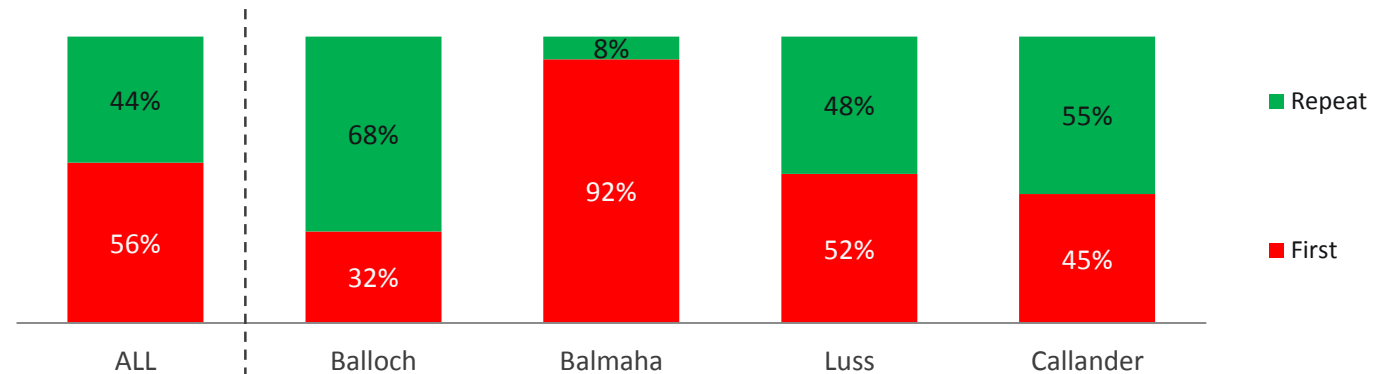
## Frequency of visits to honey-pot locations (sample locations)



Frequency of visiting sample location



First/repeat visits at sample location



Q2: Including this visit, how many times have you visited [interview location] in the last 2 to 3 years?

Base (all): 381  
Balloch: 140, Balmaha: 114, Luss: 71, Callander: 56

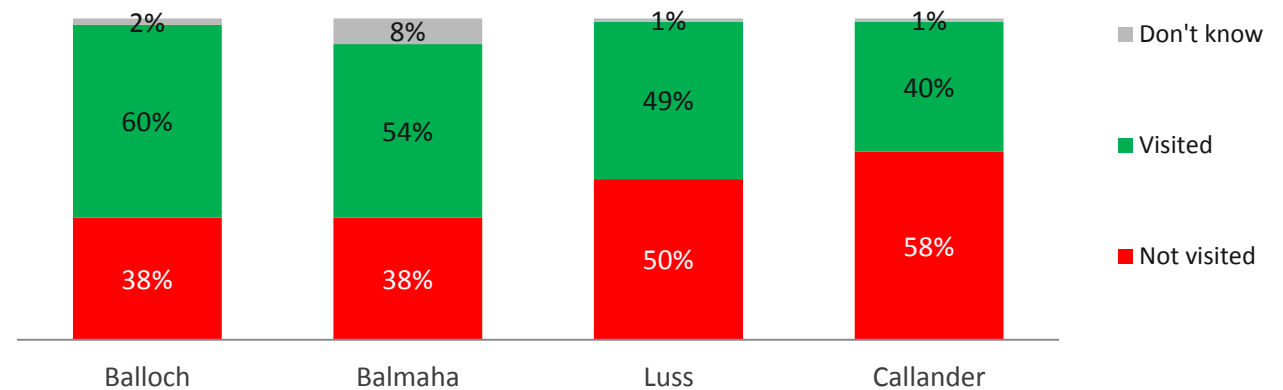
# Frequency of visits

- Respondents were also asked about visits to the other honey-pot locations.
- Across the sample as a whole, Balloch was the most frequently visited place (60% of the sample had been there in the last 2-3 years) and Callander the least visited (40% had visited).
- Taken together, this means that while just under half (46%) had been to only one of the locations in the last 2-3 years, substantial minorities had been to two (21%), three (19%) or all four of these places (15%).
- Over half of the sample had therefore been to more than one honey-pot site without venturing further into the National Park.

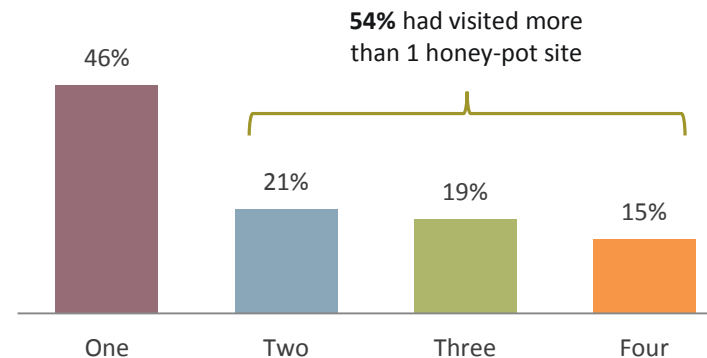
## Number of visits to honey-pot locations (all locations)



All locations visited



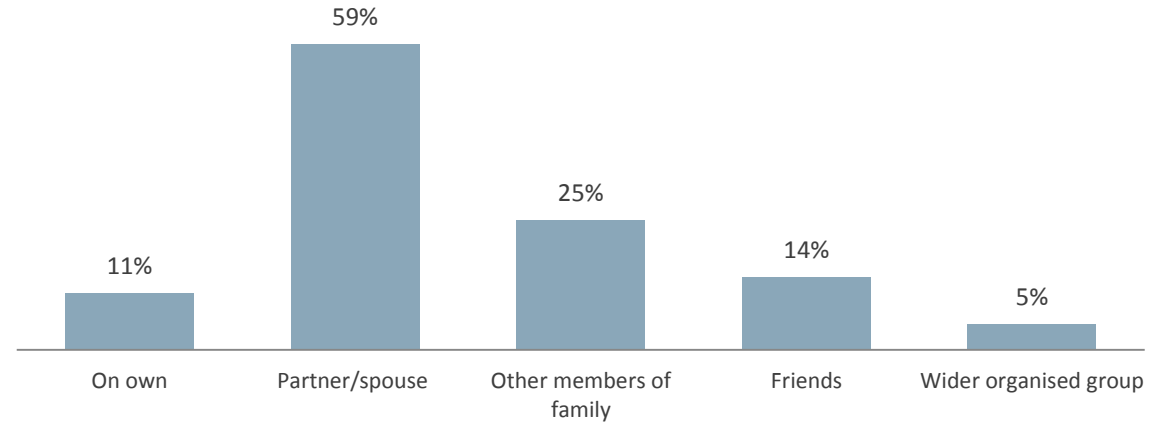
No. honey-pot sites visited



# Group composition

- Visitors were most likely to be with their partner/spouse (59%), 25% were with other family members and 14% were with friends.
- Around one in ten (11%) respondents were on their own.
- The average number of adults per group was 2.8.

## Group composition: adults



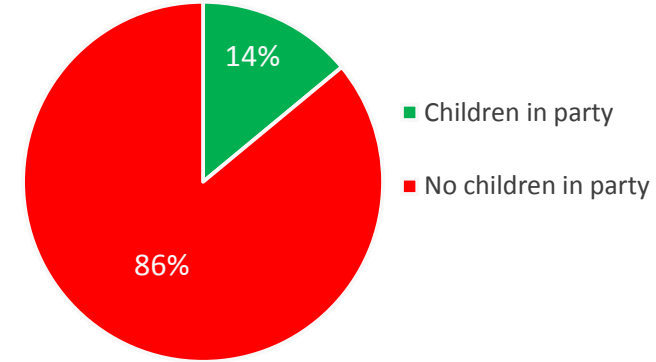
Number of adults	
One	11%
Two	63%
3~5	22%
6+	3%
Average	2.8
Base	381

# Group composition

- The majority (86%) did not have children in the party on this visit – 14% were with children.
- Among these, the average number of children was just under 2 per group (1.7). This included children from a range of ages.
- The average overall party size (including adults and children) was 3.1. This varied across locations as detailed below.

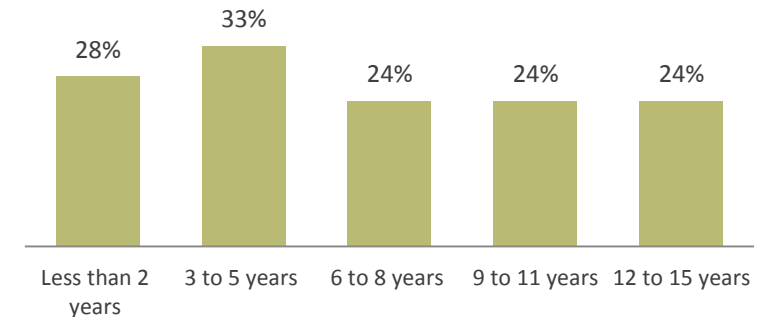
	ALL	Balloch	Balmaha	Luss	Callander
Average party size	3.1	2.3	3.2	2.9	5.0
Base size	381	140	114	71	56

## Group composition: children



Number of children	
One	57%
Two	33%
3~5	6%
6+	4%
Average	1.7
Base (all with children)	54

### Age of children



Q5: Including yourself, how many people are in your party today? (Q5b: number of children) / Q6: How old are the children in your group?

Base (all): 381  
 Balloch: 140, Balmaha: 114, Luss: 71, Callander: 56  
 Base (all with children in group): 54

# Transport

- Most respondents had travelled to their destination by car (77%). One in ten (9%) were on a coach tour and 6% came by train. All other modes of transport were used by very small proportions of visitors.
- Respondents who live in Scotland were most likely to be travelling by car (88%), and least likely to be on a coach tour (1%, compared to 11% of those from Rest of UK, 18% of Europeans and 36% of those from the rest of the world).
- The youngest age group were most likely to have arrived by train (16% of 16-34s, v sample average of 6%).



Those interviewed at Luss were most likely to have arrived by car (90%, compared to 75% at Balloch and 71% at Balmaha).

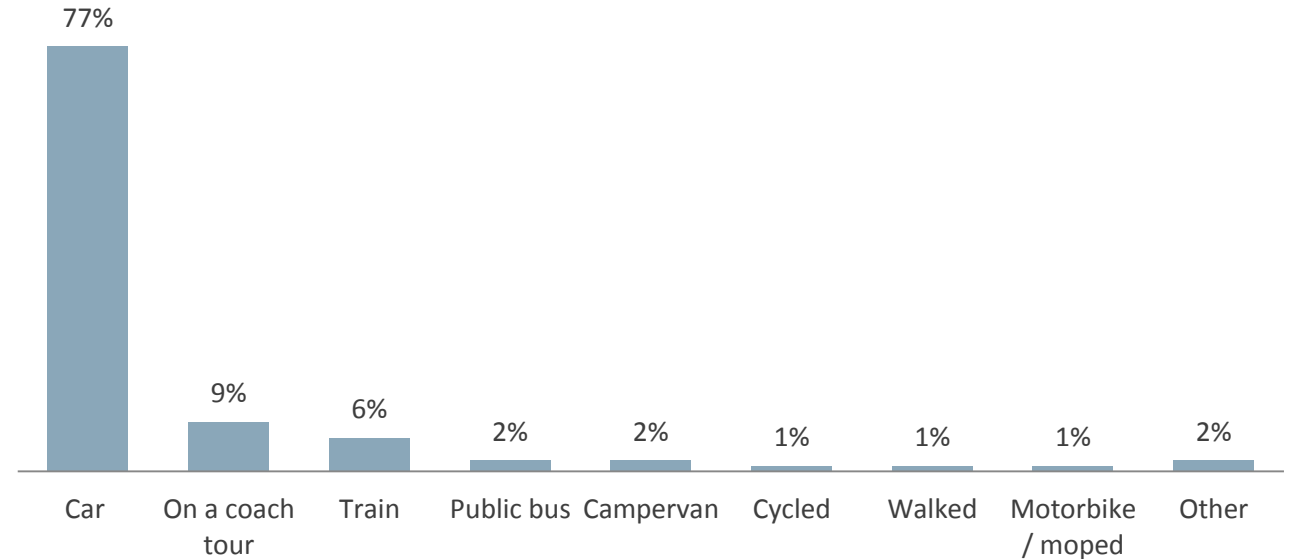


Visitors to Balloch were most likely to have arrived by train (14%, compared to 2% at Balmaha and 1% at Luss).



Those at Balmaha were most likely to be on a coach tour (19% compared to 1% at Balloch and 6% at Luss).

## Main mode of transport



# Activities undertaken

- The most common activity reported was walking (low level), mentioned by 60%.
- Visiting cafes, restaurants or bars and sightseeing / looking at scenery were both mentioned by 44%.
- A quarter (25%) had been or planned to go shopping, and 14% mentioned high level / hill walking.
- 'Other' activities were mentioned by 29 people – most commonly these activities related to dog walking / dog market (6 respondents). Two people mentioned fishing.

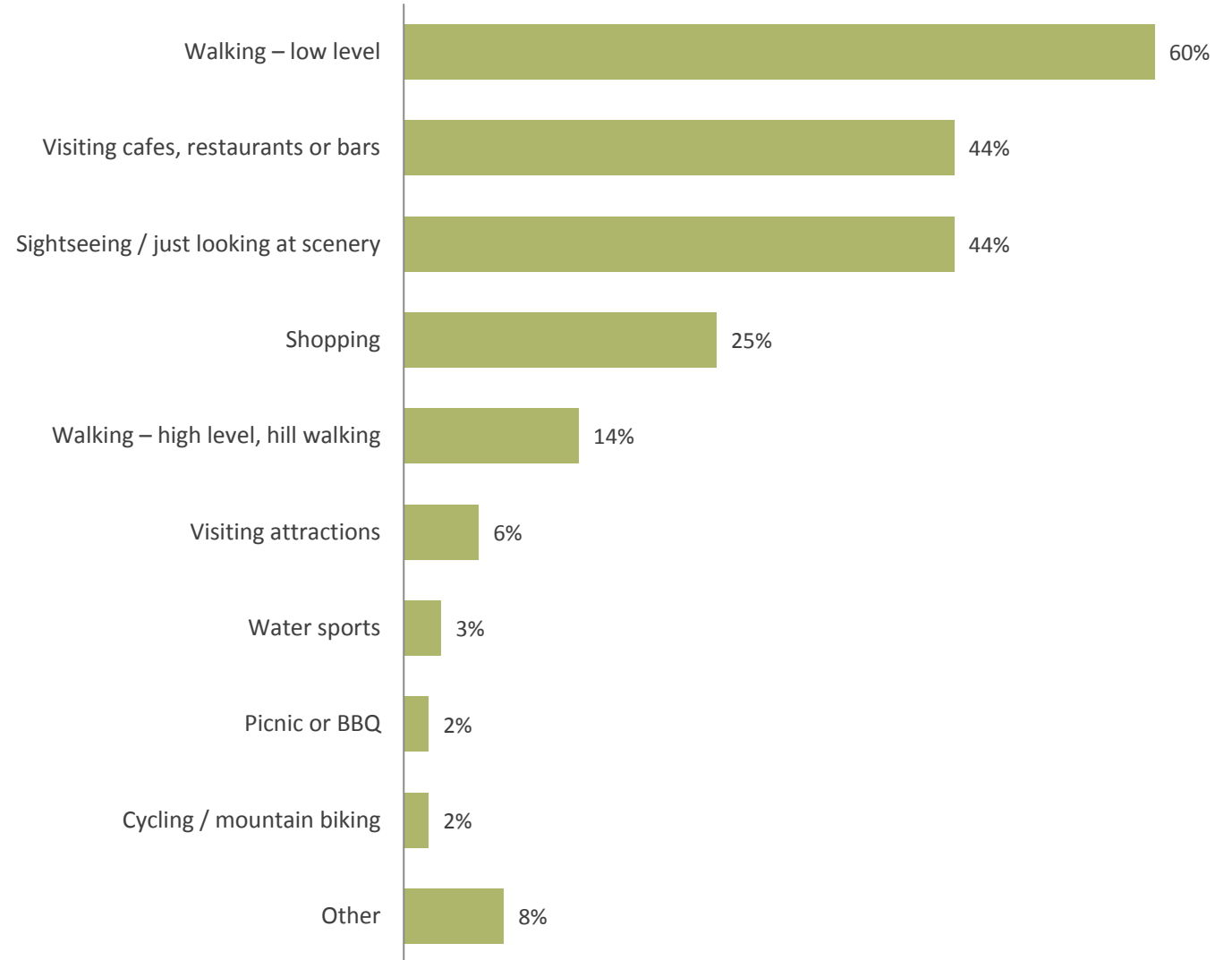
Visitors to Balloch were most likely to mention low level walking (88%), while those at Balmaha were most likely to be doing high level walking (35%) or looking at scenery (58%). Respondents at Callander were most likely to be going shopping (54%). Luss respondents were more likely than those at Balloch or Balmaha to mention visiting cafes, restaurants or bars (62%).

The youngest age group (16-34) were more likely than the oldest (55+) to mention walking (either high or low level), and were the least likely to mention shopping. The oldest respondents were most likely to mention visiting cafes, restaurants or bars.

Repeat visitors were more likely than first time visitors to be doing low level walking (66% v 55%) or shopping (33% v 18%), while first time visitors were more likely to be doing high level walking (22% v 4%) or sightseeing / looking at scenery (52% v 34%).

Those on a day trip from home were also generally more likely than those on a short break or holiday to mention low level walking, and less likely to mention sightseeing / looking at scenery or high level walks.

## Activities undertaken during the visit





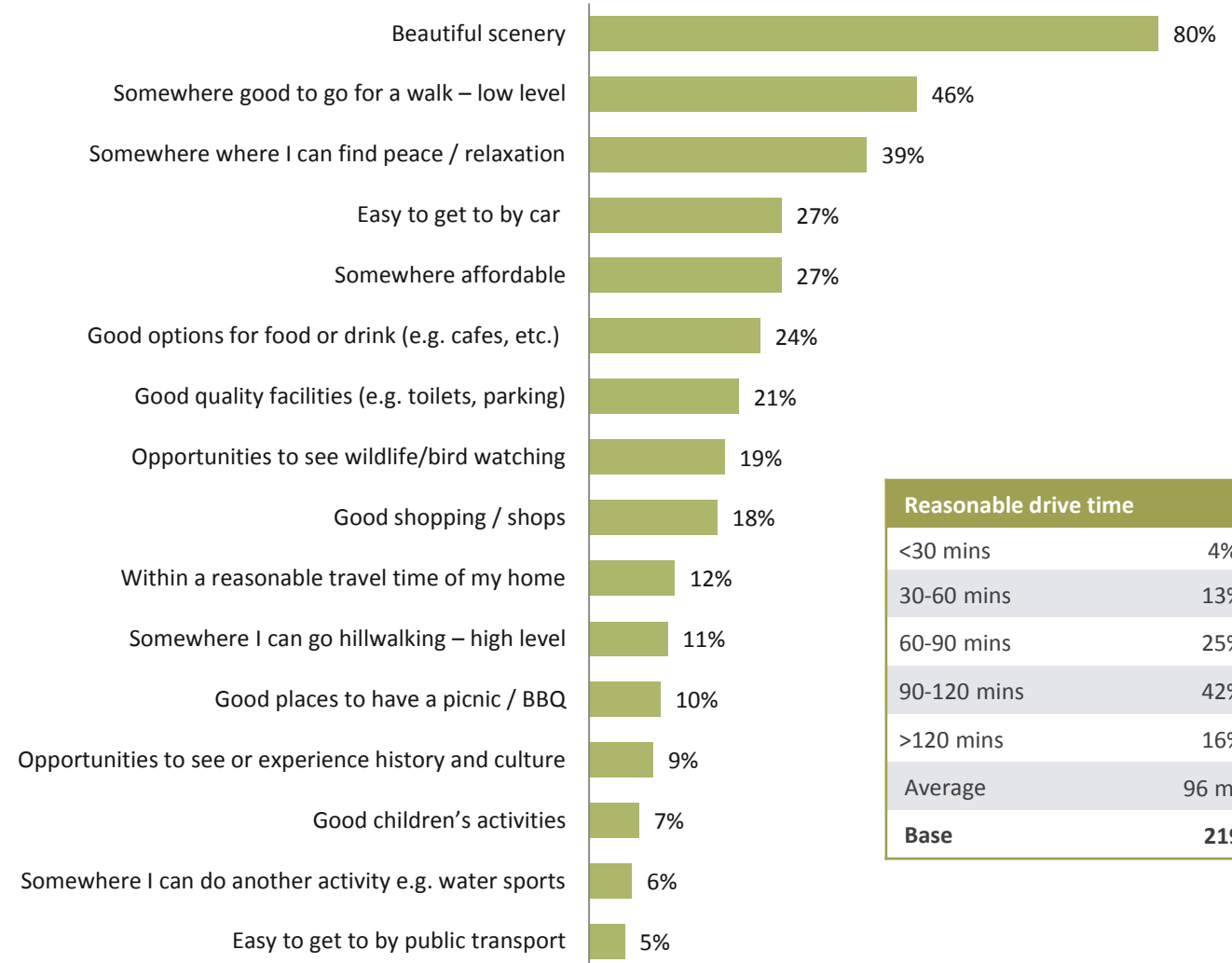
# Considerations when planning a trip



# Choosing a day trip

- When thinking about planning a day trip, by far the most frequently mentioned factor was beautiful scenery (80%).
- Somewhere good to go for a low level walk (46%) and somewhere to find peace and relaxation (39%) were also commonly mentioned.
- Around a quarter mentioned needing to be able to get there easily by car (27%), somewhere affordable (27%) and being able to find good options for food or drink (24%).
- Other considerations included the weather (mentioned by 11 respondents), somewhere easy to meet friends / easy to get to (9), and somewhere dog friendly (7).
- Around one in ten (12%) highlighted being a reasonable travel time from home – the average time thought to be reasonable was about an hour and a half (96 minutes).

## Planning a day out



Reasonable drive time	
<30 mins	4%
30-60 mins	13%
60-90 mins	25%
90-120 mins	42%
>120 mins	16%
Average	96 mins
Base	219

# Why this location

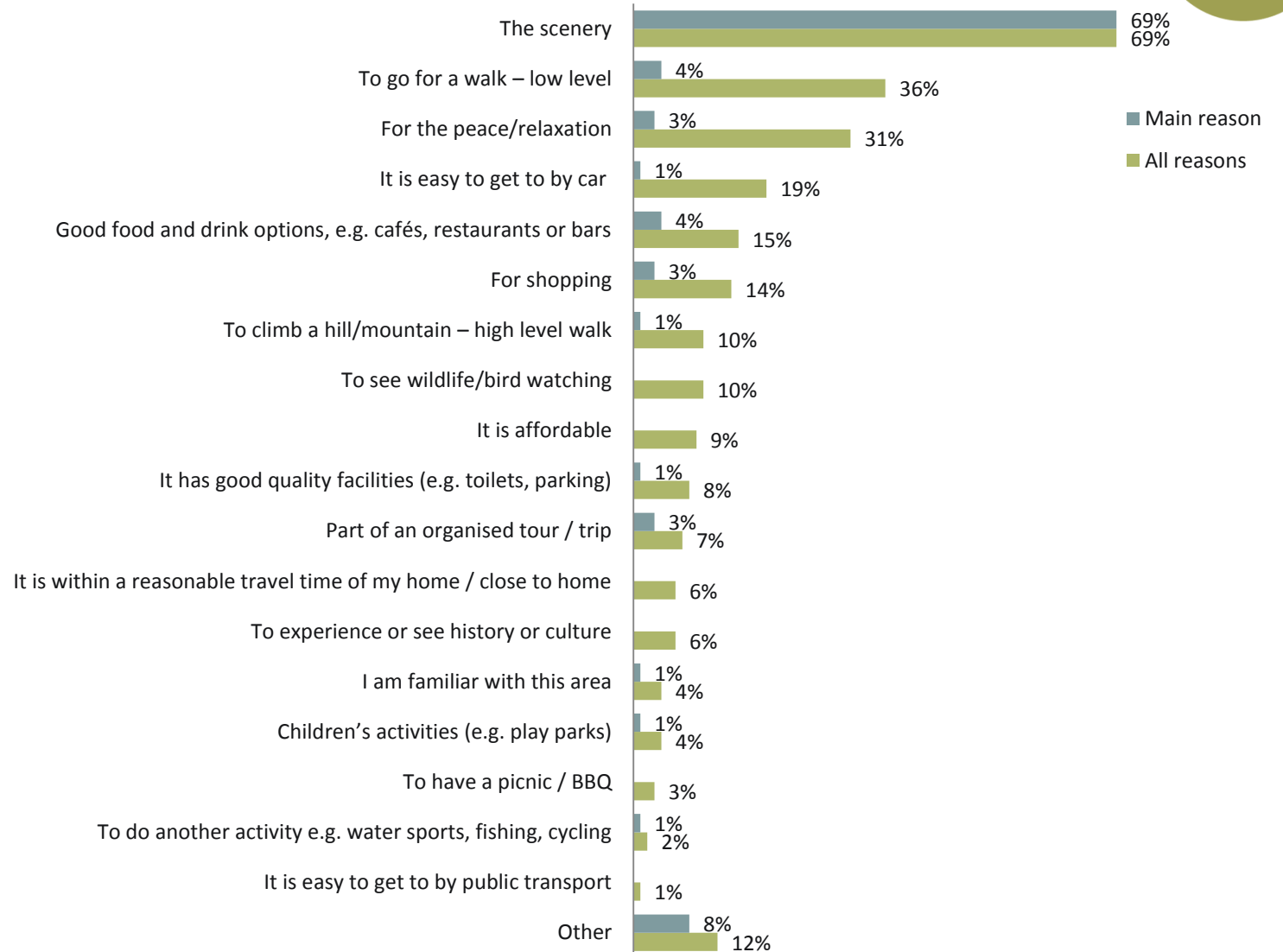
- Respondents were asked why they had chosen this particular location for their visit. The most common response was the scenery (mentioned by 69%), followed by to go for a walk (36%) and for the peace and relaxation (31%).
- When asked to select the main factor influencing their choice to visit this location, the scenery was by far the most commonly mentioned (69% - the same proportion as mentioned it as 'any' reason, i.e. these respondents either gave this as the only reason, or went on to say it was the most important reason).
- Of the 'other' responses given, the most common related to visiting a dog market (6 respondents) or passing through on their way to another location (5).

Respondents who were on a short break or holiday were more likely to mention hill walking than those on a day trip from home.

Visitors to Callander were more likely than others to mention shopping (30% all reasons; 16% main reason), while those at Balloch were most likely to mention the scenery (82% all/main). Luss visitors were most likely to mention peace/relaxation (52% all) or food and drink options (30% all). Those at Balmaha were most likely to mention high level walks (32% all).

The youngest age group (16-34) were more likely than the oldest (55+) to mention scenery as the main reason for choosing this location (78% v 64%).

## Reasons for choosing this location



Q12: Thinking specifically about your trip here today, which of the following factors influenced your decision to visit [interview location] today? / Q13: What would you say was the main reason for visiting [interview location] today?

# Other locations

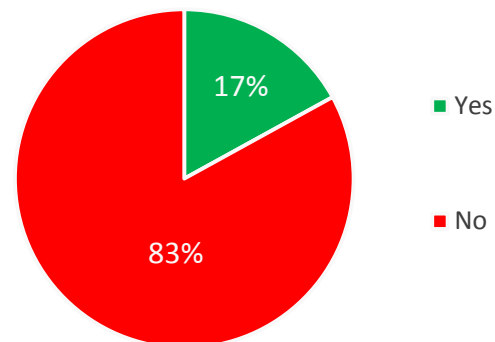
- Most respondents (83%) had **not** considered another location when planning their trip.
- Even among those who did consider somewhere else, it is worth noting that the most common location mentioned was one of the honey-pot sites (12 people had considered Balloch).
- Luss and Callander also featured on the list of most common suggestions. Very few considered other places within the National Park, although 5 mentioned Loch Lomond itself.

88% of repeat visitors had not considered any other locations, compared to 79% of first time visitors – repeat visitors tend to keep coming back without considering alternative locations.

## Other locations considered



Whether other locations were considered for this trip



Most common locations considered	No.
Balloch	12
Stirling	6
Loch Lomond	5
Luss	4
Callander	4
Aberfoyle	4
Lochearnhead	3
Oban	3
Base (all who considered)	66

# Information sources

- Half of the sample (51%) had not used any information to find out about the location before visiting.
- The most commonly mentioned sources of information were friends/relatives (18%), while one in ten used general internet searches and/or the VisitScotland website (both 10%).
- When asked about sources of information they generally find most useful, the most often mentioned sources were general internet searches (28%), advice from friends/relatives (19%), Trip Advisor (18%) and the VisitScotland website (15%).
- Very few people gave an 'other' response, the most common of which was maps (maps, Google maps or online maps – mentioned by 6 respondents as being used this trip, and by 10 respondents as a preferred information source).

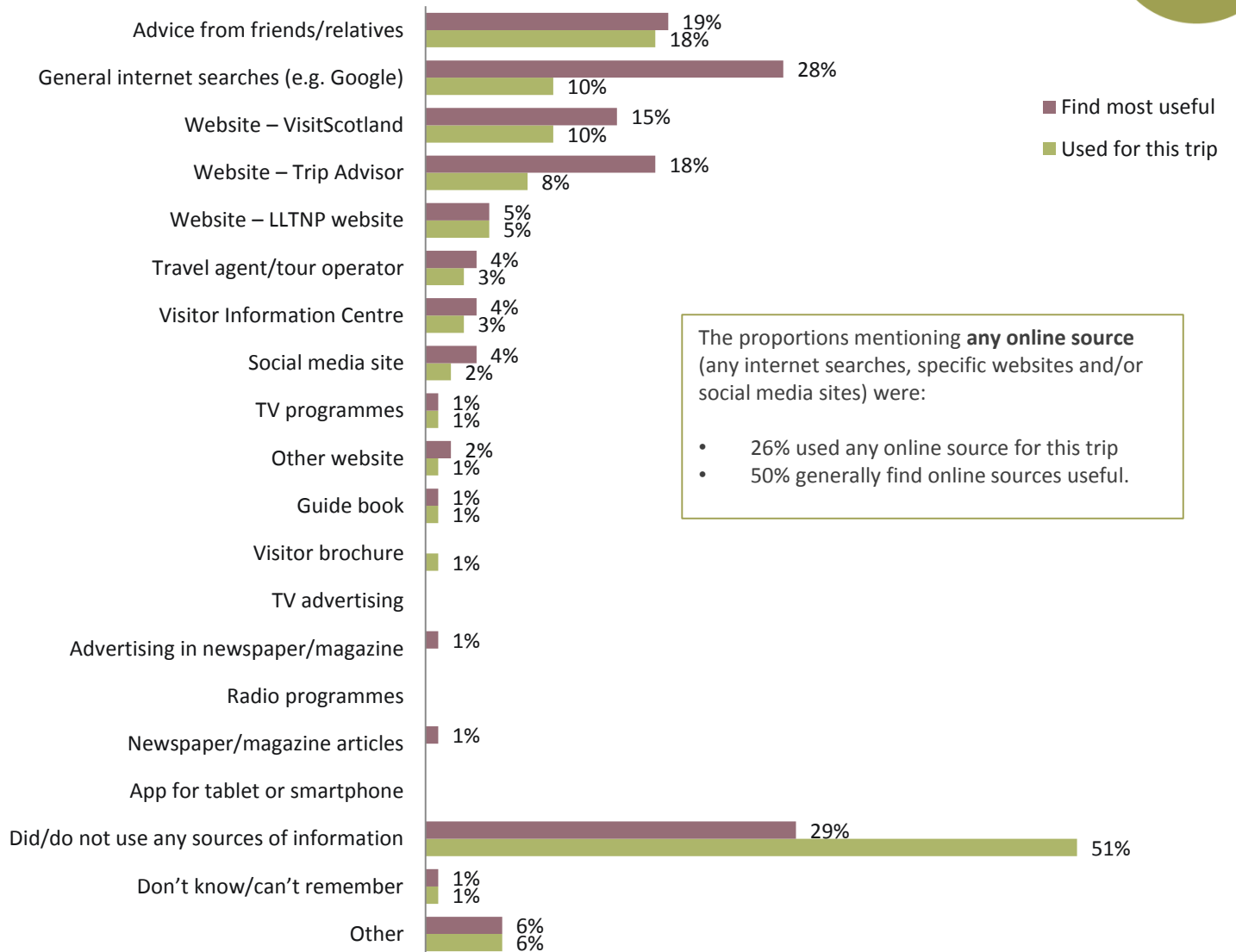
Those visiting Balmaha were most likely to have used any information source – e.g. 31% of these visitors had advice from friends/relatives and 21% had made an internet search.

Unsurprisingly, first time visitors were more likely to have used any information sources (only 31% said they hadn't used any, compared to 75% of repeat visitors).

Younger respondents were more likely than the oldest group to have used Trip Advisor (14%) or the VisitScotland website (17%).

Scottish residents were least likely to have used information before visiting, as were those on a day trip rather than a short break or longer holiday. It is worth noting that 38% of Scottish respondents said they do not tend to use any information sources for planning their trips in Scotland.

## Information sources used & preferred



Q14: Which sources of information, if any, did you use, to find out about [location] prior to this visit? / Q15: Which sources of information do you generally find most useful when planning a day trip, short break or holiday in Scotland?

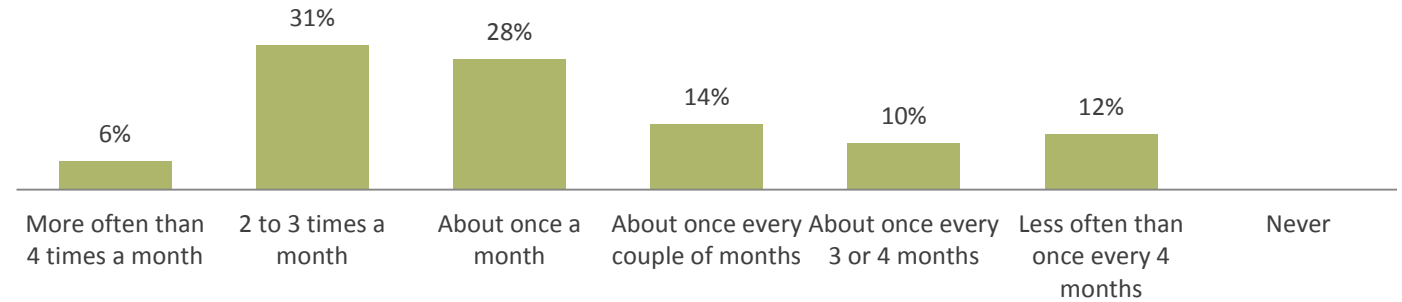
# Frequency of day trips & holidays

- Overall, the frequency of going on leisure day trips was fairly high – 31% said they do this 2 to 3 times a month and 28% do so monthly. Two thirds of the sample overall (64%) said they go on day trips at least once a month, and 75% of those living in Scotland said this.
- Although a fifth (22%) said they never go on holidays or short breaks with at least one overnight stay in Scotland, around half (49%) said they do this once a year or more.
- Among Scottish residents, this figure was 67% – i.e. two thirds of Scots said they go on trips with an overnight stay in Scotland at least annually.

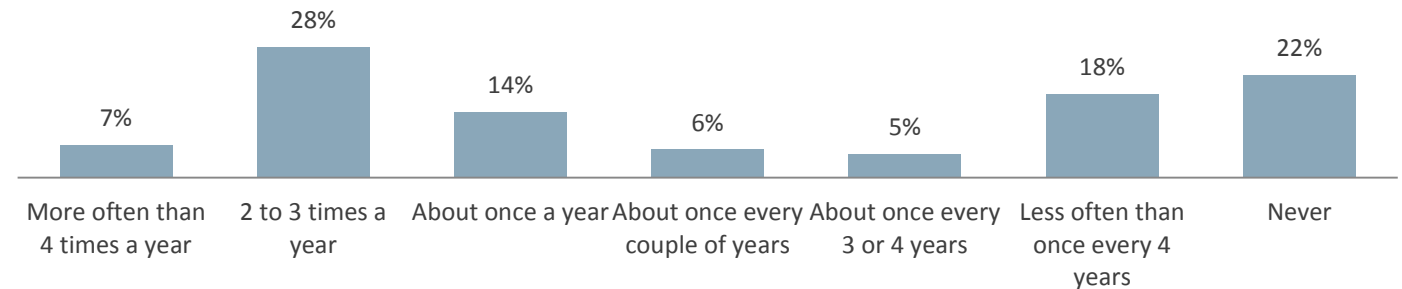
## Frequency of leisure trips / holidays



### Leisure day trips



### Holidays / short breaks



Q18: How often do you tend to go on leisure day trips generally?

Q19: How often do you tend to go on holidays or short breaks with at least one overnight stay in Scotland?

# Other locations for breaks / holidays

- Respondents who said they ever go on short breaks or holidays in Scotland were asked where they tend to go. A wide range of places was mentioned, the most common of which were Edinburgh and Glasgow, followed by Oban, Inverness, Skye and the Highlands.

## Other locations for short breaks or holidays in Scotland

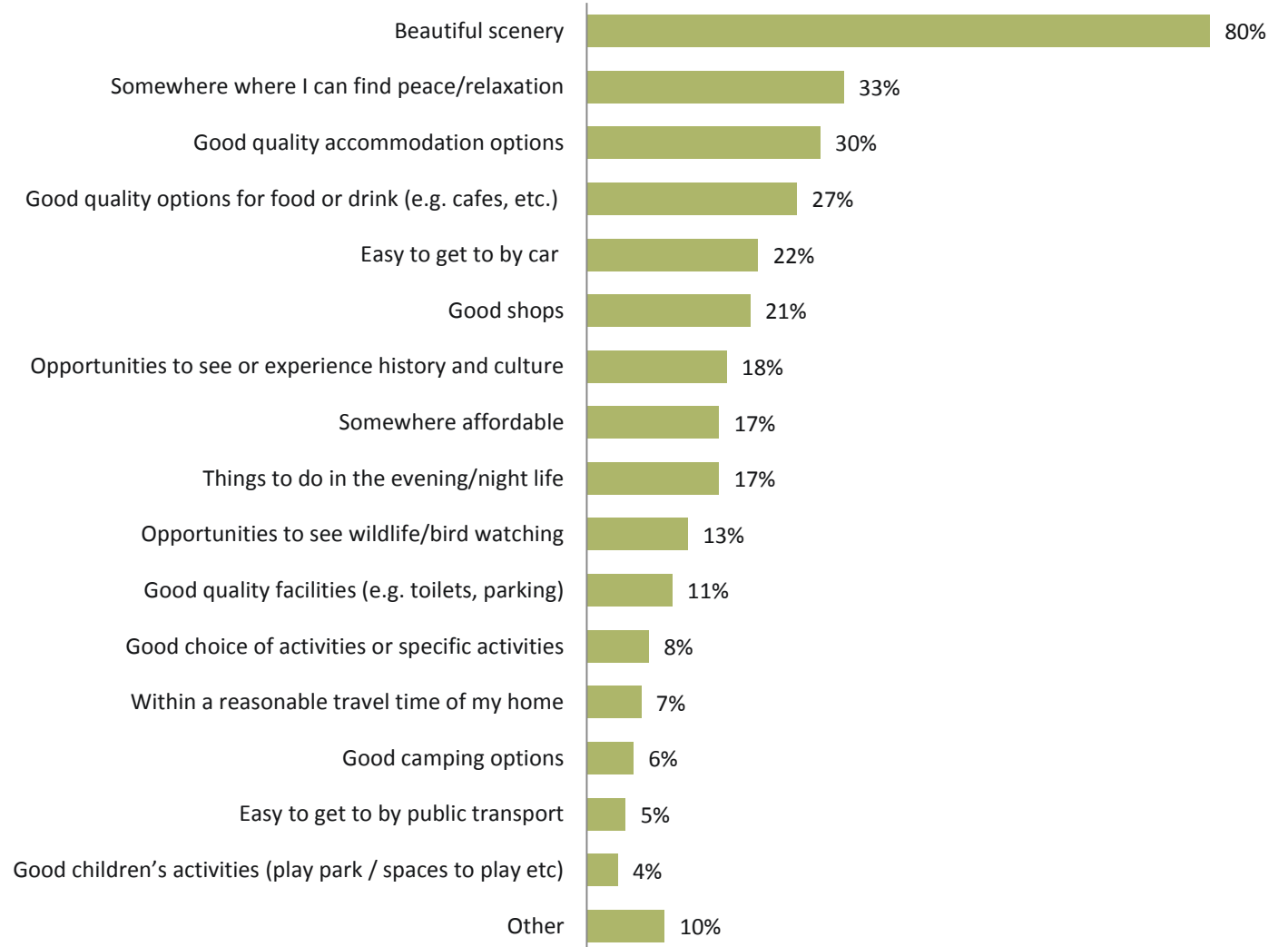


Most common locations	
Edinburgh	15%
Glasgow	10%
Oban	8%
Inverness	8%
Skye	7%
Highlands	7%
Perth(shire)	6%
Fort William	4%
Pitlochry	3%
Aberdeen	3%
Ayr	3%
Stirling	3%
Arran	3%
Loch Lomond	2%
St Andrews	2%
West Coast	2%
Base	298

# Choosing a short break / holiday

- Similar to factors influencing choices of day trip location, beautiful scenery was the most commonly mentioned factor important when choosing somewhere in Scotland for a short break or holiday, mentioned by 80%.
- Between a quarter and a third also mentioned somewhere to find peace / relaxation (33%), good quality accommodation options (30%) and good quality options for food and drink (27%).
- Around a fifth also want to go somewhere easy to get to by car (22%), with good shops (21%) and/or with opportunities to experience history or culture (18%).
- 'Good choice of activities or specific activities' was identified by 8%, most commonly walking/hillwalking (mentioned by 8 of the 24 respondents) or fishing (3).
- 10% gave an 'other' response – these tended to relate to being able to visit friends or family (mentioned by 16 respondents), or going somewhere dog friendly (6).

## Planning a short break in Scotland



Q21: Which of the following factors are most important to you when choosing somewhere to go in Scotland for a short break or holiday?

Base (all who ever go on short breaks): 298



# Reasons for not venturing further

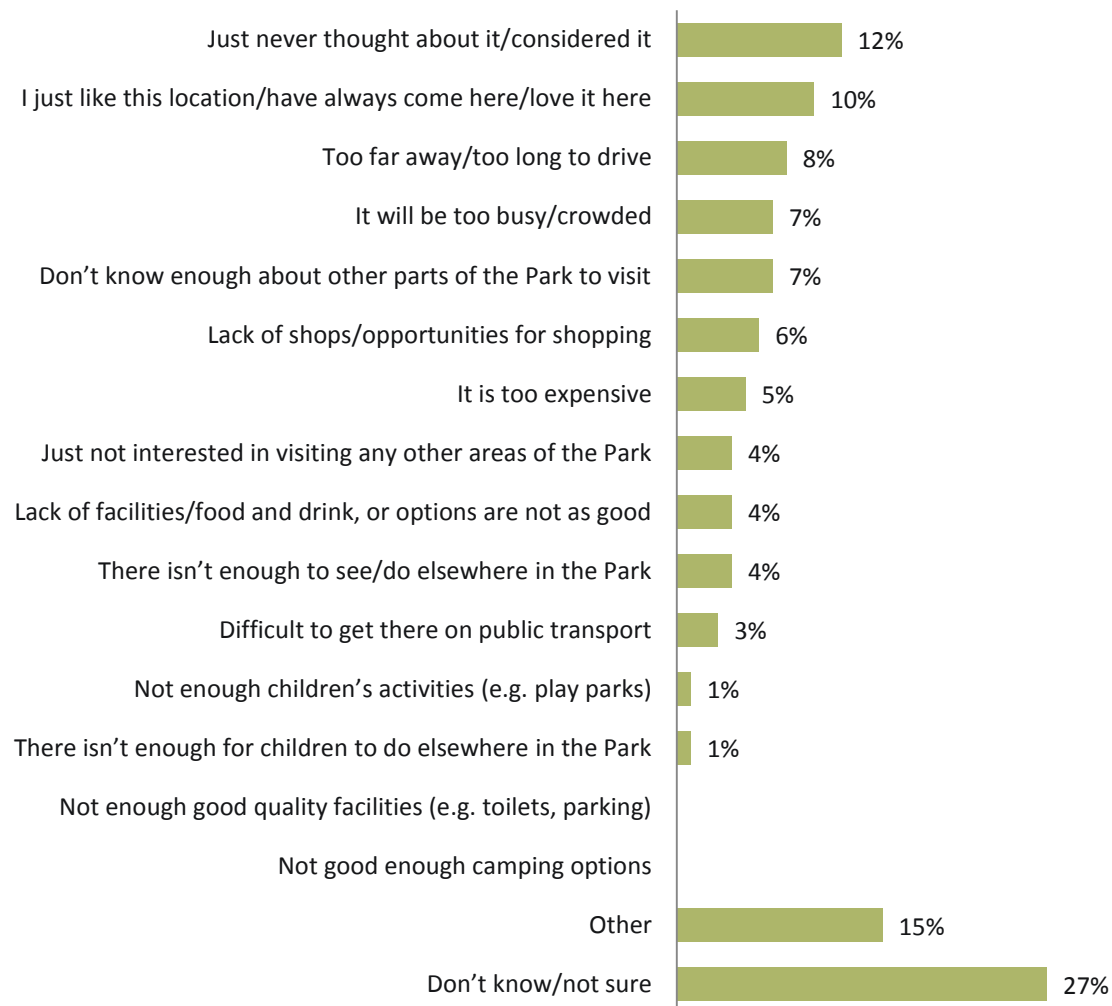


# Reasons for not venturing further



- Scottish residents were asked why they had not visited other areas of the National Park for a day trip in the last 2-3 years.
- **Very few people gave specific reasons that were actively putting them off going to other parts of the Park** – e.g. 8% mentioned the distance and 7% thought it would be too busy/crowded.
- The most common response was 'don't know' (27%). The most often mentioned reasons were they had just never thought about it (12%), or they just like the place they were visiting today (10%).
- Other reasons, mentioned by 15% overall, included they have only just moved here so don't know the area yet (5), it is too close to home (4) they were just passing through so not stopping anywhere else (4), or they have not had time (4).

## Reasons for not making day trips to other parts of the Park (Scottish residents)



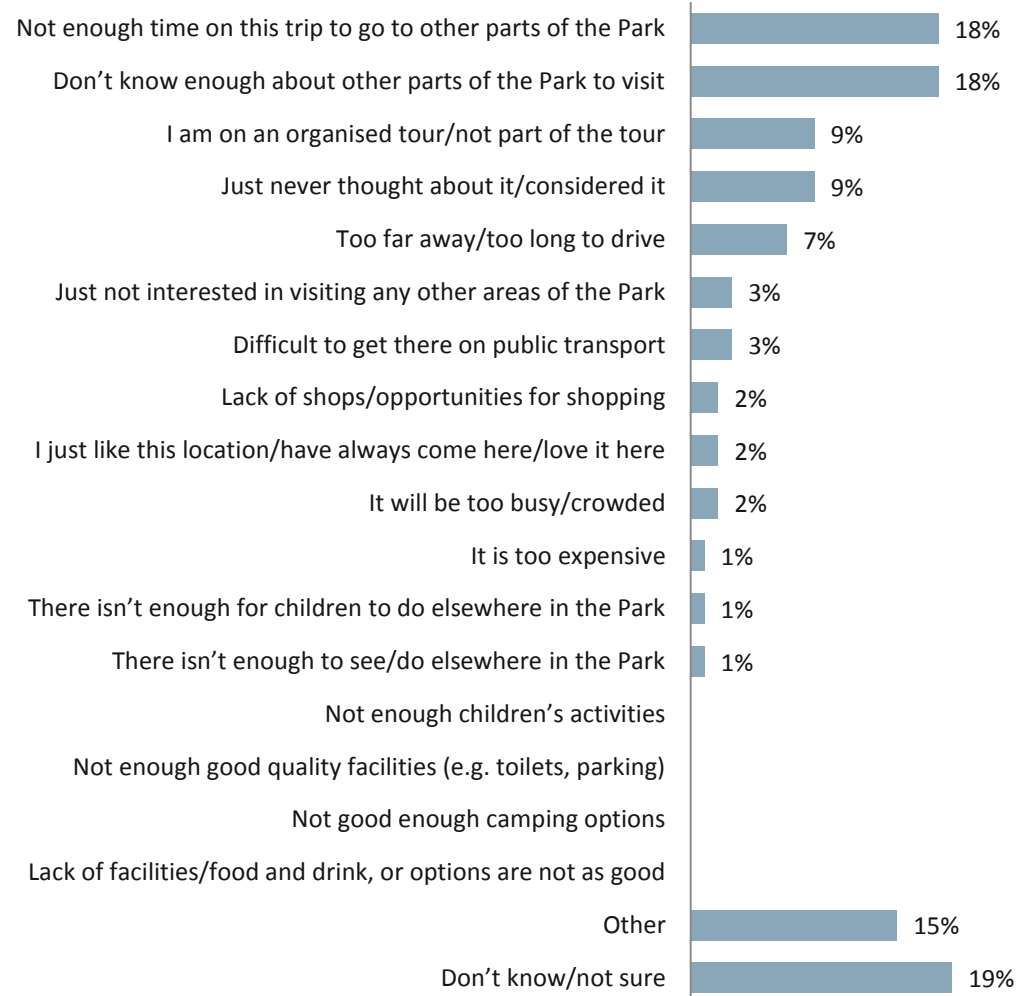
Q22: You said earlier that you had not visited other areas of the National Park for a day trip in the last 2-3 years, other than here in [location] or [other locations]. Are there any particular reasons for this?

Base (all living in Scotland): 219

# Reasons for not venturing further

- Respondents who did not live in Scotland were asked why they had not visited other areas of the National Park as part of their trip. The most common responses were that they had not had time on this trip (18%) or they don't know where to visit / don't know enough about other parts of the Park (18%) – although a fifth (19%) said they didn't know.
- Around one in ten had just never considered it (9%) and the same proportion were on an organised tour which did not include other areas of the Park (9%).
- Other reasons, given by 15%, were fairly varied. The only things mentioned by more than one person were they prefer to go somewhere else (4), lack of time/holiday available (3) or they have only just arrived in Scotland (2).
- **Again, very few gave specific reasons that had put them off visiting other areas of the National Park** – 7% mentioned the distance but very few mentioned any other specific issues.

## Reasons for not visiting other parts of the Park on this trip (non-Scottish residents)



Q23: You said earlier that you had not visited other areas of the National Park on this trip, other than here in [interview location] or [other locations]. Are there any particular reasons for this?

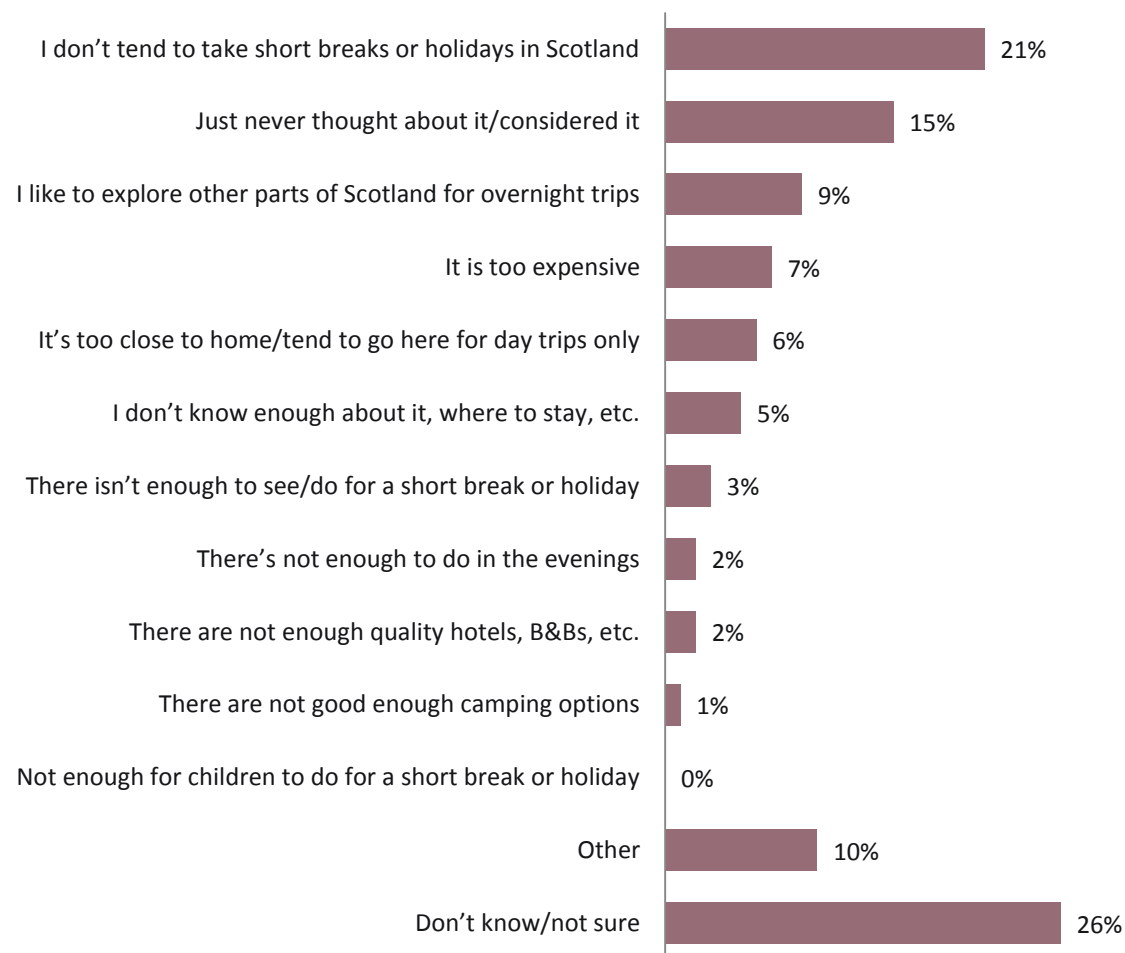
Base (all who do not live in Scotland): 162

# Reasons for not venturing further



- All respondents were asked about their reasons for not making an overnight trip in the National Park in the last 2-3 years.
- A quarter said they were not sure (26%), a fifth (21%) said they just don't tend to take short breaks or holidays in Scotland and 15% had just never thought about it.
- One in ten (9%) said they like to explore other parts of Scotland for overnight trips, and 6% said it was too close to home.
- The only specific issues raised were cost (7% thought it is too expensive) and that respondents don't know enough about it (5%).
- 'Other' reasons given included: the distance/it is too far (7 respondents), they prefer to stay with family (4), or they have only just arrived in Scotland/the area (3).

## Reasons for not staying overnight



Q24: You said earlier that you have not had an overnight trip within the National Park in the last 2-3 years. Are there any particular reasons for this?

# National Park status and future visits

progressive



# National Park status

- Awareness that they were visiting a location within the National Park was relatively high at 78% - 20% said they were not aware and 1% said they didn't know.
- Among those who were aware they were visiting part of the Park, responses were split in relation to how important this was in influencing their decision to visit. Although the most common response was that this was 'quite important' (31%), overall 44% said it was important and 43% said it was not important (12% said neither/nor).

Awareness was higher among Scottish (86%) than European (52%) or rest of world respondents (69%). There was no difference by country of origin in terms of the importance of National Park status, however.

Younger respondents were also less aware the area they were visiting was part of the National Park (68% of 16-34s).

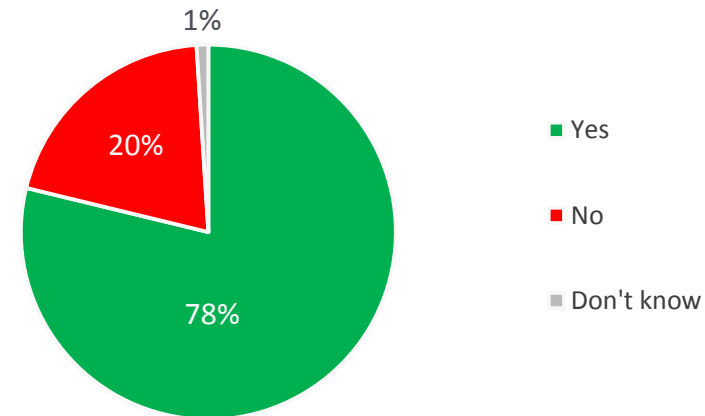
Visitors to Balmaha were least likely to be aware they were in a national park (68% were aware, compared to 89% of Callander and 87% of Luss visitors). First time visitors (69%) were less aware than repeat visitors (91%).

Balloch visitors who were aware of NP status were most likely to say it was important in their decision to visit: 69% said it was very or quite important, v sample average of 44%.

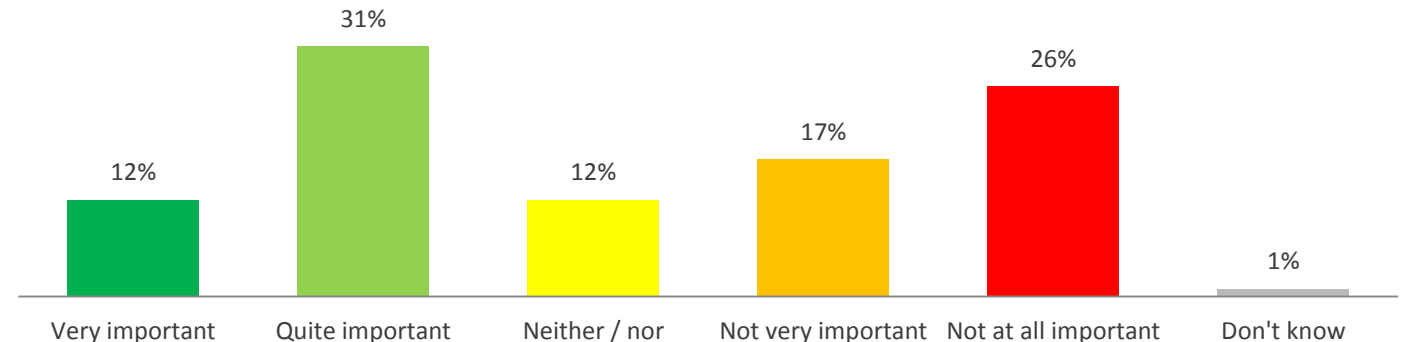
## Awareness and views of NP status



Aware location is part of the National Park?



How important was NP status in deciding to visit?



Q25: Before today, were you aware that [interview location] is part of the Loch Lomond and The Trossachs National Park? / Q26: In your decision to visit [interview location] today, how important was the fact that this area is a National Park?

Base (all): 381  
Base (all aware of NP status): 299

# Likelihood of visiting in future

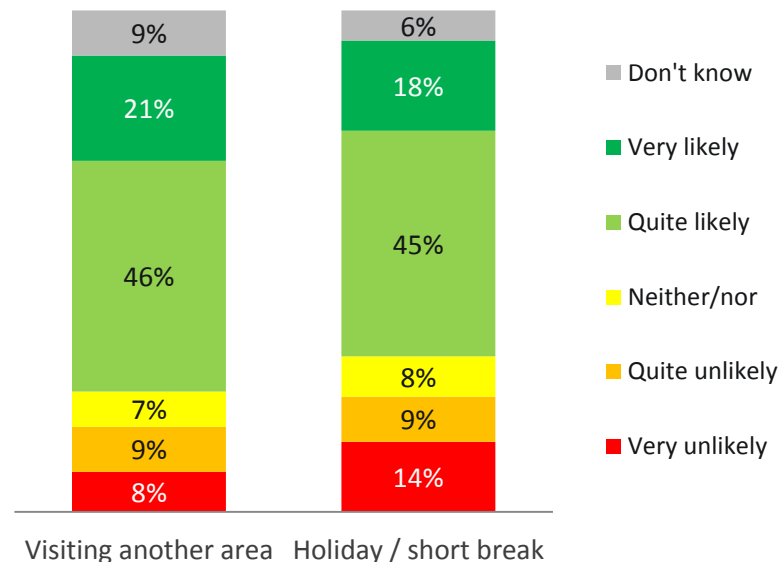
- Just under three quarters overall (73%) said they were very or quite likely to visit another area of the National Park (other than the honey-pot sites) in the next two years – 21% said this was very likely.
- Two thirds (67%) said they were very or quite likely to visit the Park for a short break or holiday within the next two years – 18% said this was very likely.
- Reasons given for not being likely to do either tended to focus on distance / location rather than anything actively putting them off visiting the National Park.

Scottish residents were more likely than any other group to say they would be likely to visit another area of the Park (85% said this, compared to sample average of 73%).

Visitors to Balloch were most likely to say they would visit another area (88%) or stay for a holiday (86% v 67% average).

Repeat visitors were also more likely to say they would visit a different area (84%) or stay for a holiday (76%).

## Likelihood of visiting another area in the National Park / for a holiday



### Main reasons for not being likely to visit another area:

- Live too far away (18)
- Planning to go somewhere else (14)
- Don't come very often / not coming back (13)
- No time (7)

### Main reasons for not being likely to stay for a holiday / short break:

- Live too far away (23)
- Too close (19)
- Planning to go somewhere else (12)
- Don't come very often / not coming back (9)
- Not much to do / too remote (4)

Q27: What is the likelihood of you visiting another area within the National Park, other than Balmaha, Luss, Balloch or Callander, in the next two years? / Q29: What is the likelihood of you visiting the National Park for a short break or holiday in the next two years? / Q28/Q30: Why would you be unlikely to visit another area of the National Park [for a short break or holiday]?

# What would encourage more visits

- All respondents were asked what, if anything, would make them more likely to visit another area within the National Park in the future.
- No single response was mentioned by a large proportion of the sample – indicating that visiting other areas is not something that people have actively thought about.
- The most common response was better weather (10%).
- Some responses highlighted positive aspects that would make them likely to visit (e.g. the scenery, mentioned by 6%, or the walking opportunities mentioned by 4%) while others suggested improvements (e.g. cheaper/better accommodation or more things to do/places to visit, both mentioned by 7%).
- However, a quarter said that nothing would make this more likely (27%).

## What would encourage more visits to the National Park – open-ended



	%
Better weather	10%
Cheaper/better accommodation	7%
More to do/places to visit/things to see	7%
The scenery	6%
If I'm back	6%
More/better food and drink options	5%
Walking/hiking	4%
Improved facilities	4%
Make it more dog friendly	2%
Cost/make it cheaper	2%
More/better shops	2%
If I had more time	2%
Deals/offers/promotions (e.g. Groupon deals)	2%
Improve parking	2%
Influence of friends/family (e.g. if they recommended it, or came with me)	2%
If it was closer	2%
More info/advertising	2%
<b>Nothing</b>	<b>27%</b>
<b>Don't know</b>	<b>6%</b>
<b>Base (all)</b>	<b>381</b>

\* Only comments made by 2% or more of the sample are detailed



# Conclusions and recommendations



# Conclusions



## Overview

- This survey achieved a **robust quantitative sample** of visitors to honey-pot sites who do not venture further into the National Park.

## Sample profile and type of visit

- Just over half of visitors were from Scotland (57%), with 19% from the rest of the UK and 24% from overseas. Visitors tended to be day trippers (56%) rather than holiday makers visiting as part of a trip away from home (44%).
- There was a slightly older age profile across the sample as a whole – 38% were aged 55+, 34% were aged 35-54 and 27% were aged 16-34 – the age profile of respondents living in Scotland was reflective of the Scottish population as a whole. Visitors tended to be in the higher socio-economic groups (64% ABC1), although non-UK residents tended to be higher SEG than Scottish respondents.
- Around half (56%) were on their first visit to the interview location in the last 2-3 years, while 44% were repeat visitors. Some had visited numerous times (e.g. 13% had visited more than 20 times). Over half of the sample (54%) had been to more than one honey-pot site without venturing further into the National Park.





## Key attractions – why are people visiting the honey pot sites?

- Factors influencing decisions to visit these locations focused on the scenery – the number one reason for seven in ten visitors (69%). Other attractions included being able to go for a walk, and the peace and relaxation. Being easy to get to by car and good food and drink options also contributed to decisions to visit these locations.
- The most common activities undertaken during their visit were low level walks (60%), visiting cafes, restaurants or bars (44%), looking at scenery (44%), shopping (25%) and high level/hill walking (14%).
- There seems to be a tendency to visit the honey-pot locations based on habit, rather than because other locations have been considered and rejected – eight in ten visitors (83%) had **not** considered another location when planning their trip. Even among those who did consider somewhere else, the most common location mentioned was another honey-pot site, Balloch.
- Nearly nine in ten **repeat visitors** (88%) had not considered alternatives – i.e. people keep coming back without really thinking about other possible locations.

## Why are visitors not venturing further, or staying longer?



- Visitors found it difficult to pinpoint specific reasons they had not visited other areas of the National Park.
- Day trippers based in Scotland tended to say 'don't know', they had just never thought about it, or they just like the place they were visiting today. Only small proportions mentioned specific reasons putting them off, e.g. 8% mentioned distance and 7% thought it would be too busy/crowded.
- Among those on holiday who had not ventured further into the Park, the most common responses were a lack of time on this trip, or they don't know where to visit/don't know enough about other areas – although again a substantial minority said they didn't know. Seven per cent mentioned the distance but very few identified any other specific issues.
- Reasons for not making an overnight trip to the National Park included 'don't know' (26%), they just don't take short breaks in Scotland (21%) or they had just never thought about it (15%). The only specific issues raised were cost (7% thought it is too expensive) and that respondents don't know enough about it (5%).

# Conclusions



## Is there potential to increase visits to other areas and encourage overnight trips?



- Findings suggest there is potential to increase visits to other areas and overnight stays – e.g. 75% of those living in Scotland said they go on day trips at least monthly, and 67% said they go on trips with an overnight stay in Scotland at least annually.
- Responses were also positive in relation to likelihood to visit other areas (73% were very or quite likely to do so) or stay in the National Park for a short break or holiday (67%). There were also very few specific barriers to visiting other areas of the Park or to stay overnight.

## What could be done to persuade visitors to explore more of the Park?



- Very few respondents identified specific problems that would need addressing in order for them to visit in future. The key appears to be in promotion of other areas, rather than improvements in services / facilities etc.
- When planning day trips or short breaks, key considerations are beautiful scenery, finding peace/relaxation, being able to go for a walk, accessibility by car, good quality food and drink, good quality accommodation, good shops, and opportunities to experience history/culture. Promotion of these aspects of the National Park could help encourage more visits and longer stays.
- Distance and cost are the only two potential areas that could help reassure visitors – any information highlighting good value options / deals and/or accessibility of other areas of the Park could help address this – although the proportions mentioning these issues were relatively low.
- Some said they did not know enough about other areas of the Park to visit – so promoting what is available could help encourage people to try new areas.
- The most commonly used information sources include general internet searches, the VisitScotland website and Trip Advisor. However, it is worth noting that 38% of Scottish respondents said they do not tend to use any information sources for planning trips in Scotland. Word of mouth recommendations / advice from friends and relatives will also be important in promoting the area.
- Although awareness of the area's National Park status was relatively high (78%), it is possible that improving awareness will generate additional visits – although views were split on the importance of this in influencing visitors' choice of location.

# Recommendations



## Scottish visitors / day trippers



- The key issue for domestic visitors is that they habitually visit the same locations and do not go through an active decision making process when choosing somewhere to go for a day out. The other challenge is that this means they do not consult sources of information in order to inform the decision.
- However, there are no strong barriers to visiting other areas on the Park. Most also travel by car, so limitations of public transport are not preventing visits.
- To encourage visiting further afield and overnight stays, it is the habitual selection of the honey-pot sites that needs to be challenged.
- Give people a reason to visit other areas, for example:
  - Highlight and promote things to do and see in other parts of the Park – e.g. good walks, historical sites, beautiful views
  - Demonstrate how easy these areas are to reach – e.g. provide drive times from Glasgow, or public transport options
  - Provide example itineraries for a day out or a weekend break – e.g. towns with lovely cafes, hotels, etc.
  - Provide itineraries based on themes – a family day out, a romantic break, an active holiday, etc.
  - Highlight the beauty, peace and tranquillity of other areas of the Park with stunning photography
  - Highlight the accessibility of the Park for a holiday compared to other destinations, such as the Highlands, Lake District, islands, etc.

## Visitors from the rest of UK and overseas / holidaymakers



- The decision making process is likely to be far more considered for these visitors. However, many will decide their itinerary long before they arrive in Scotland, and/or may be on a touring holiday with many locations in Scotland to visit.
- The challenge is therefore to influence decisions at the time of planning and booking. For example:
  - Ensuring the Park is well represented on tourism information sites such as VisitScotland and Trip Advisor
  - Promoting the Park to tour operators generally and to coach tour operators etc.
  - Promoting the Park at entry points to Scotland.
- Other aspects of the area to promote are likely to be similar to those outlined above for day trippers, e.g. highlighting things to do and see, emphasising natural beauty, suggesting itineraries etc.

# Contact info



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# Technical appendix



## Data collection

- The data was collected by face-to-face CAPI interview.
- The target group for this research study was visitors to specific areas of the National Park who had not visited elsewhere / stayed overnight in the Park in the last 2-3 years.
- The target sample size was 350 and the final achieved sample size was 381. The reason for the difference between these two samples was interviewers achieving higher numbers than their targets.
- Fieldwork was undertaken between 9<sup>th</sup> September and 8<sup>th</sup> October 2017.
- Respondents were selected using probability random sampling, where interviewers selected every nth person passing their pre-selected sampling point. The sample is judged to represent the target population well.
- In total, 10 interviewers worked on data collection.
- Each interviewer's work is validated as per the requirements of the international standard ISO 20252. For this project validation was achieved by re-contacting (by telephone or email) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where telephone/email details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.

## Data processing and analysis

- The overall sample size of 381 provides a dataset with a margin of error of between  $\pm 1.00\%$  and  $\pm 5.02\%$ , calculated at the 95% confidence level (market research industry standard).
- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
- For CAPI Questionnaires these checks include:
  - Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
  - Using our analysis package SNAP, data received via over-the-air synchronisation is imported from our dedicated server.
- A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
- Where 'other' type questions are used, the responses to these are checked against the parent question for possible up-coding.
- Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
- A SNAP programme set up with the aim of providing the client with useable and comprehensive data. Crossbreaks are discussed with the client in order to ensure that all information needs are met.
- None of this project was sub-contracted.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.



# Progressive's services



## **Core qualitative techniques**

A full range of qualitative research methods



## **Language and behaviour**

Gets communications right in tone and content



## **Mobile ethnography**

Captures real consumer behaviour in real time



## **The View on Scotland**

Glasgow city centre viewing facility provides comfort convenience and first class facilities



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Discovers core brand values, benchmarks and maps progress



## **Core quantitative techniques**

A full range of quantitative research methods



## **Progressive Scottish Opinion**

Offers fast and inexpensive access to over 1,000 Scottish consumers



## **Progressive Business Panel**

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## **Field and tab**

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## **Data services**

We have a wide range of analytical services