



progressive

**Loch Lomond and Trossachs National Park  
Authority**

Visitor Survey 2019-20

Final Report

December 2020



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# Project background

The Loch Lomond & The Trossachs National Park was established in 2002, the first of Scotland's two National Parks (the second being the Cairngorms National Park).

The National Park Authority co-ordinates the delivery of four statutory aims: to conserve and enhance the area's natural and cultural heritage; to promote the sustainable use of the area's natural resources; to promote understanding and enjoyment of the Park's special qualities; and to promote sustainable economic and social development of local communities.



To make sure these aims are met and to support future decision-making, the bodies responsible for the Parks' management require information regarding visitor profile and behaviour, volumes of use, visitors' knowledge and attitudes, and the impacts of information provided to visitors.

Previous visitor surveys have been conducted at the National Park – in 2003/04, summer 2011 and 2015/16. The 2019/20 Visitor Survey was commissioned to continue to inform the sustainable management of the Park. This report provides data and analysis pertaining to the 11 months from May 2019 to March 2020.

# Research objectives

The overall aim of the research was to understand visitors to Loch Lomond & The Trossachs National Park, in terms of their profile, visiting behaviour and visitor experience.

Specific research objectives were to:

1: Supply information about visitors and their type of visit, to guide future tourism policy and activity

2: Gather data which can be updated in future studies to enable changes to be tracked over time

3: Analyse and compare with previous Visitor Surveys and between the two National Parks

4: Better understand visitors' experience and motivations segmented by demographic and protected characteristics

# Method



- The research data was gathered using face-to-face interviews conducted with visitors and residents at key points throughout Loch Lomond and The Trossachs National Park. All visitors and residents who were interviewed were on a leisure trip at the time of the interview.
- Interviews were conducted using Computer Aided Personal Interviewing (CAPI) technology.
- The objective at the outset of the study was to gather data over 12 months – from May 2019 to April 2020. However, due to the coronavirus outbreak in 2020, face-to-face interviewing was no longer appropriate and was therefore concluded in March 2020.
- All data within this report refers to the 11 month period from May 2019 to March 2020. Data for the 2015/16 wave of research has been adjusted to exclude April 2016 to ensure valid comparisons.
- The target sample for the year was 2,400. Across the 11 months 2,265 interviews were achieved. Sample size targets were set each month to ensure a representative spread across the year, with 23 sample points across the Park. The number of sampling points used in 2019/20 was higher than in 2015/16.
- At each sampling point, a random sampling approach was used (no quotas set) – to ensure accurate visitor profiling.
- Each interview lasted approximately 12 minutes.

# Method



## - Differences in data collection in 2015/16 and 2019/20

- The method of data collection in 2019/20 differed from the data collection method used in 2015/16. A larger number of sampling points was also used in 2019/20 compared to previous years.
- For the 2015/16 survey, small self-completion cards (snap cards) were distributed to visitors and residents (on a leisure trip) at sampling points across the Park. These cards were given out by LLTNP rangers in the summer months and Progressive interviewers in the winter months. This meant that sampling could not be tightly controlled during the summer months as rangers were often focussed on the core aspects of their job rather than distributing the cards. The final 2015/16 data set was therefore weighted to adjust for lower sample sizes in the summer months.
- The snap cards collected a limited amount of data, focussing on key profiling questions. The majority of the survey data was collected via a follow-up online survey sent to respondents who provided their email addresses on the snap cards. This means that respondents to the 2015/16 survey were self-selecting and completed the survey without the assistance of an interviewer.
- The follow-up online survey also meant that people provided responses to questions retrospectively, after completing their trip, whereas the face-to-face interviewer led interviews in 2019/20 were conducted 'in the moment' during the trip.
- These changes in method and sampling mean that caution should be exercised in comparing data between the two waves of research.

# Analysis

## Statistical validity



- The margins of error associated with the data are detailed below. These are calculated at the 95% confidence interval (market research industry standard).

Sample type	Sample size	Margin of error
Total sample	2,265	+/- 0.41% to +/- 2.06%
Visitors*	2,196	+/- 0.42% to +/- 2.09%
Residents	69	+/- 2.34% to +/- 11.77%

- Comparisons to 2015/16 data are based on 11 months – May 2015 to March 2016 – to ensure comparability to 2019/20.
- Only statistically significant differences are reported.
- Bases vary by question depending on routing.
- Where figures do not add to 100% this is due to multi-coded responses or rounding.
- In commentary where net figures are reported these may differ slightly from the added figures in the chart. This is due to rounding and using absolute figures to calculate nets.
- On some charts figures of <1% and 1% are not shown for ease of reading.
- Updates to the questionnaire in 2019 mean that direct comparisons to previous years are not possible for some questions. This is noted where relevant throughout the report.

\* For some questions asked of visitors only the base size is slightly lower. This is due to some residents classifying themselves as visitors during the pilot phase of interviewing. This issue was resolved by checking the postcode of every respondent at the start of the survey to ensure accurate classification of residents and visitors.

# Analysis

## Sub-sample analysis



- The analysis detailed in this report includes highlighting statistically significant differences between sample sub-groups.
- These sub-groups are:
  - Season – Summer (Jun, Jul, Aug 2019); Autumn (Sept, Oct, Nov 2019); Winter (Dec 2019, Jan, Feb 2020); Spring\* (May 2019, March 2020)
  - Origin 1 – Scotland; rest of UK; all overseas
  - Origin 2 – Scotland; rest of UK; Europe; North America; other overseas
  - Gender – male; female
  - Age – 16-34; 35-44; 45-54; 55-64; 65+
  - Locations – Trossachs, East Loch Lomond, West Loch Lomond, Breadalbane, Balloch, Cowal
- The sample sizes for each sub-group are detailed below:

Season	Base
Summer	1,089
Autumn	492
Winter	256
Spring	428

Origin	Base
Scotland	1,376
Rest of UK	425
Europe	294
North America	113
Other overseas	57
All overseas	464

Demographics	Base
Male	1,034
Female	1,229
18 – 34	499
35 – 44	380
45 – 54	459
55 – 64	482
65+	441

Location	Base
Trossachs	499
East Loch Lomond	417
West Loch Lomond	432
Breadalbane	448
Balloch	384
Cowal	85

\*Spring excludes April data – the Coronavirus outbreak meant no interviewing could take place in April 2020



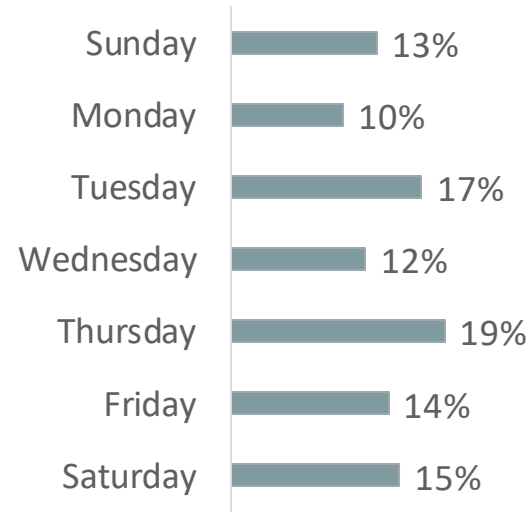
# Sampling

## Day and month

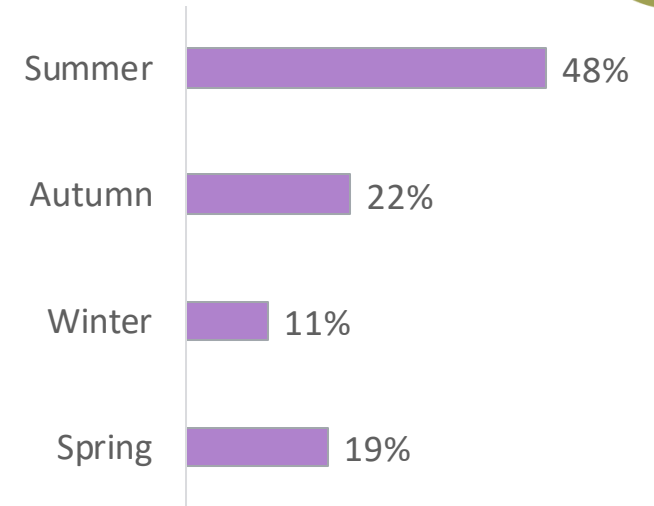
- Sampling was spread across days of the week and the months of the year.
- A sampling plan was prepared at the project outset to allocate interviewing across the 23 sampling points and across the months of the year.
- The largest proportion of interviewing was conducted in the summer months of June, July and August (48%). The autumn months (September, October, November) and spring months (March, May) accounted for approximately one fifth of interviews and 11% were conducted in winter (December, January, February).



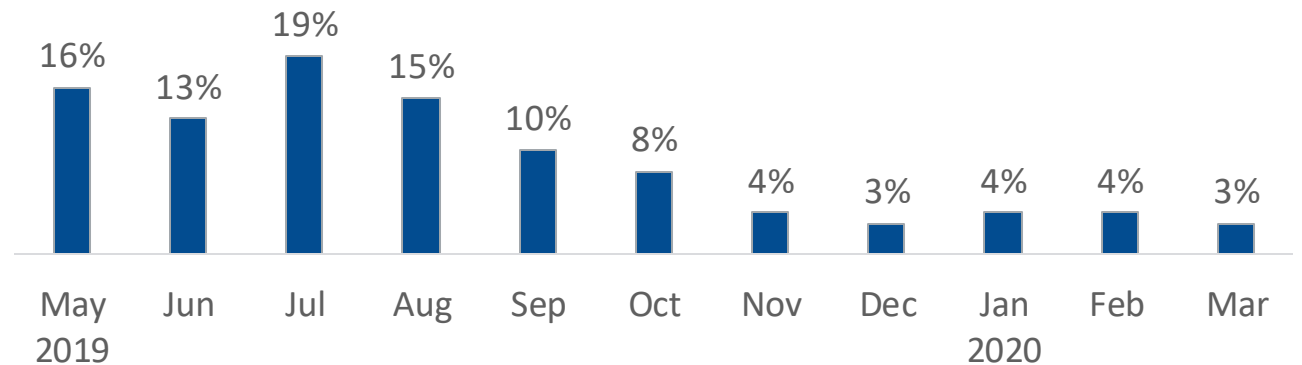
### Weekday



### Season



### Month



Base (All): 2,265

# Sampling Locations

Area	Sampling location	Number	%
East Loch Lomond – 18%	Balmaha	246	11%
	Drymen	116	5%
	Rowardennan	55	2%
West Loch Lomond – 19%	Luss	225	10%
	Duck Bay	96	4%
	Tarbet	70	3%
	Inveruglas	28	1%
	Ardlui	13	1%
Trossachs – 22%	Callander	177	8%
	Aberfoyle	167	7%
	Loch Katrine	97	4%
	Lake of Menteith	58	3%

Area	Sampling location	Number	%
Breadalbane - 20%	Tyndrum	189	8%
	Killin	99	4%
	Balquhidder	58	3%
	St Fillans / Loch Earn	35	2%
	Crianlarich	34	2%
	Strathyre	31	1%
	Loch Lubhair	2	<1%
Balloch – 17%	Loch Lomond Shores	226	10%
	Balloch	158	7%
Cowal – 4%	Arrochar	45	2%
	Benmore Gardens / Puck's Glen	40	2%



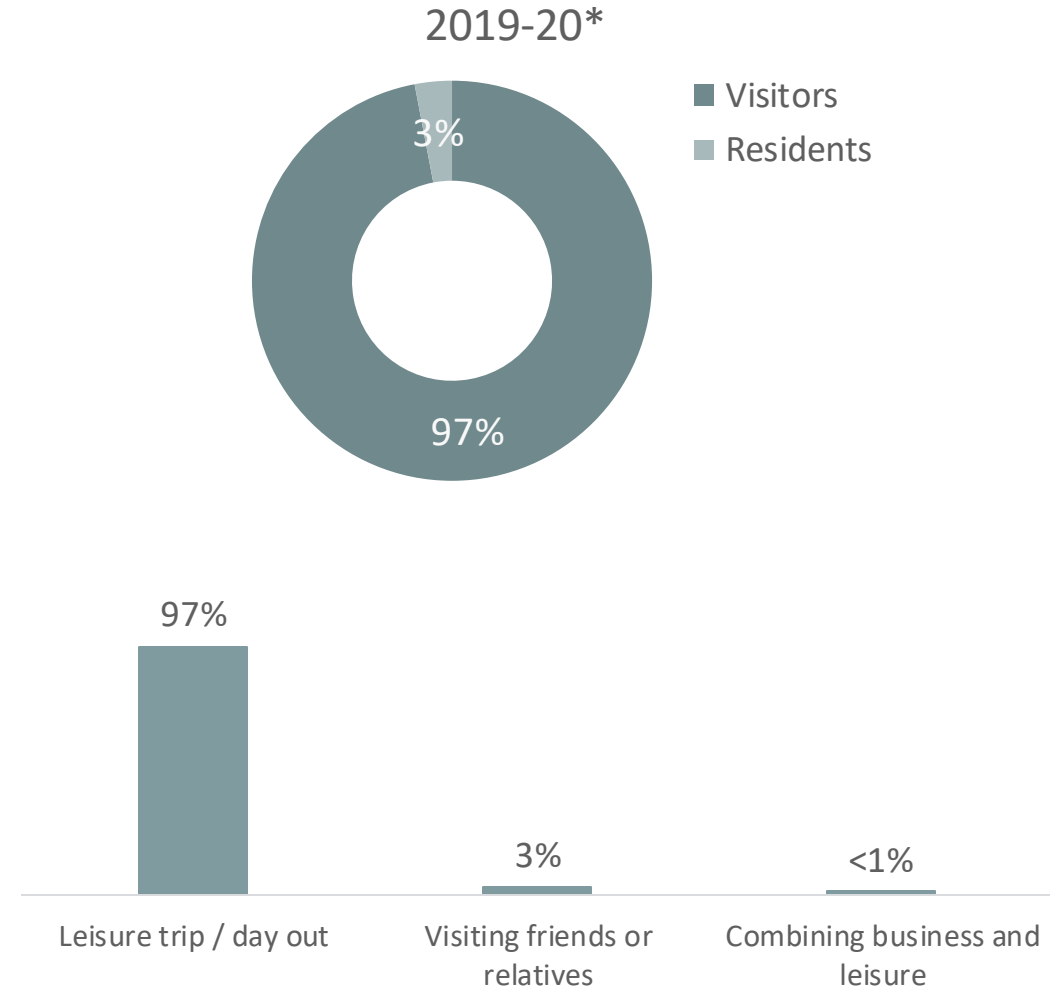
# Visitor profile

# Visitor profile

## Visitors and residents

- The vast majority of respondents interviewed were visitors to Loch Lomond and Trossachs National Park (97%).
- Similarly, the majority were on a leisure trip (97%) rather than visiting friends or relatives (3%) or combining business or leisure (0.5%).
- It should be noted that anyone on a business trip or residents who were on personal business (such as shopping, visiting post office, etc.) were excluded from the sample.

## Visitors vs residents



\*Question not asked in 2015/16.

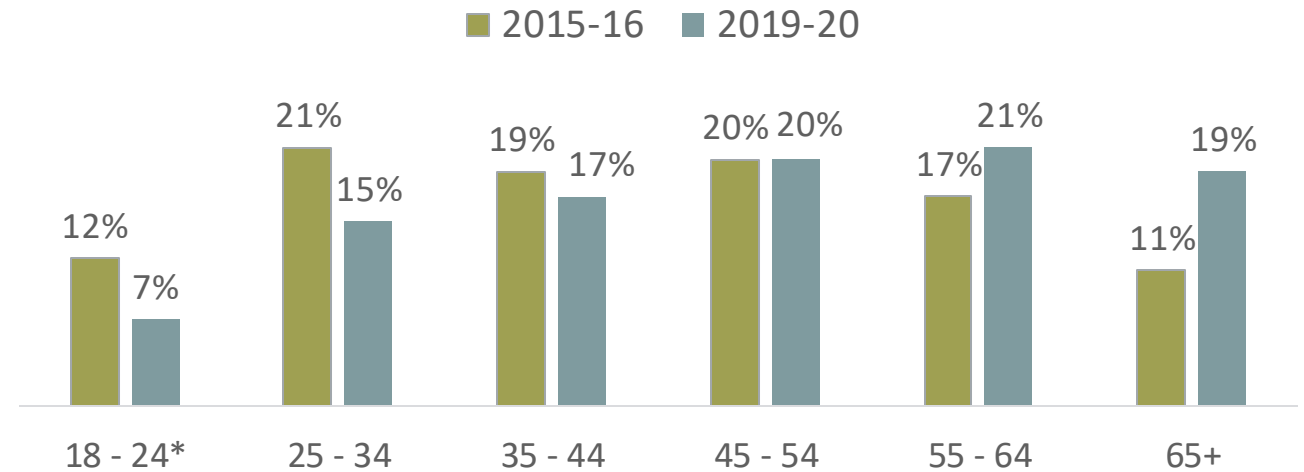
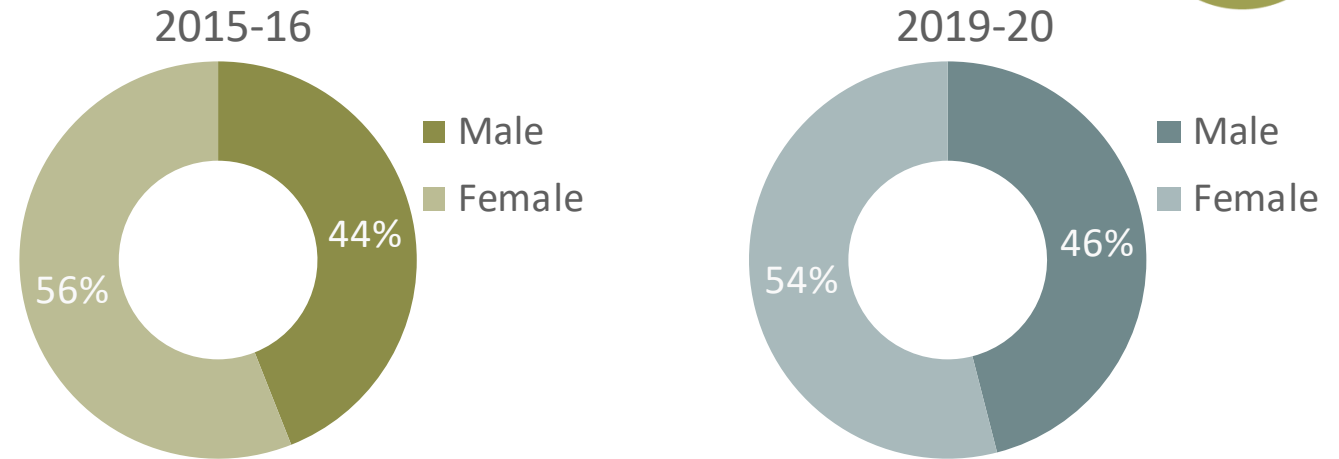
Base (All): 2019/20 2,265

# Visitor profile

## Demographics

- The total sample included slightly more females (54%) than males (46%). This reflects a very similar gender profile to 2015/16.
- There was an approximately even spread across the age groups from age 35 and older with around one fifth of respondents falling into each band. Just over one fifth were also in the under 35 year old age group, with 7% aged 18 to 24 and 15% aged 25 to 34.
- The age profile of the sample in 2019/20 was broadly similar to the profile in 2015/16; however, there were fewer respondents in the younger age groups in 2019/20 (22% 18 to 34 yrs) than in 2015/16 (33% 16 to 34 yrs). The 2019/20 sample had a higher proportion in the older age groups – 41% aged 55+ compared to 28% in 2015/16.

## Age and gender



\*16-24 years in 2015/16.

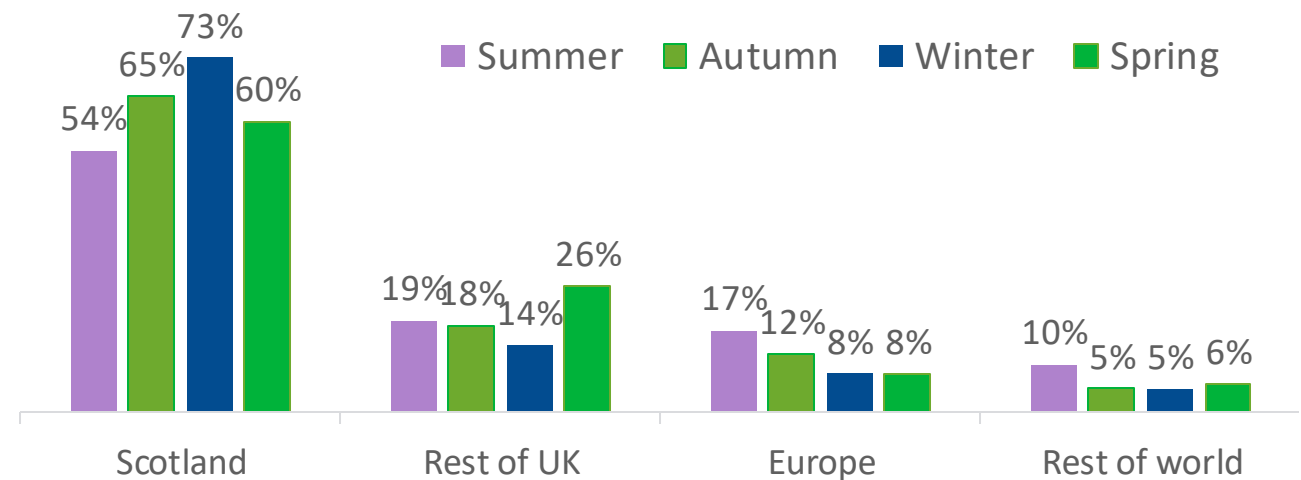
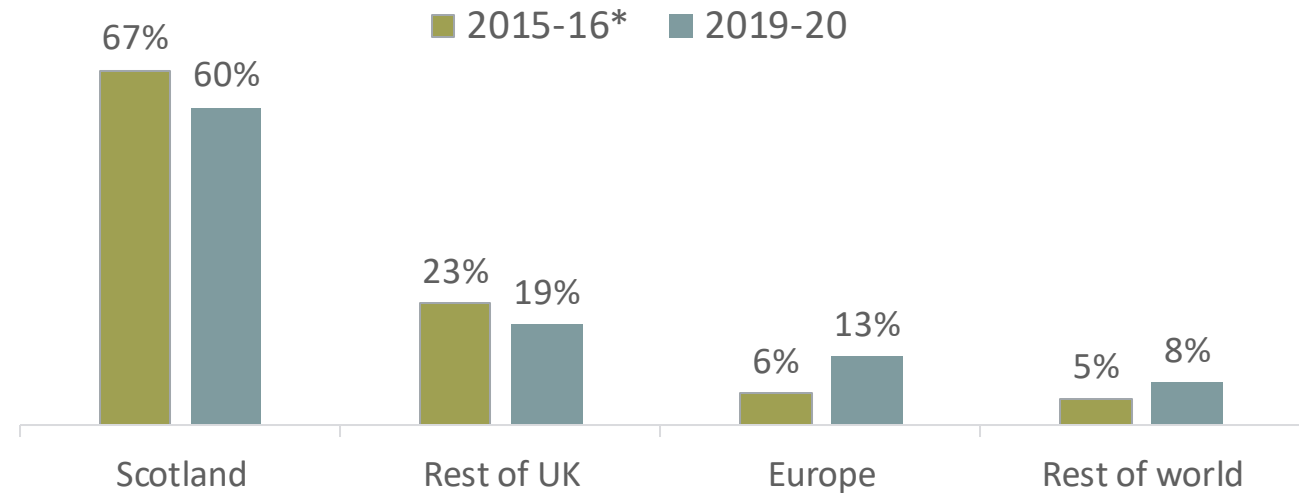
Base (All): 2015/16 Gender - 4,261, Age - 4,319; 2019/20 2,265

# Visitor profile

## Origin

- The majority of visitors to the Loch Lomond and Trossachs National Park in 2019/20 were from the UK (79%), with 60% from Scotland and 19% from the rest of the UK.
- Of the 21% overseas visitors, the largest proportion was from Europe (13%).
- The origin profile of visitors in 2019/20 was similar to the profile in 2015/16, when the majority of visitors was also from Scotland (67%) or other parts of the UK (23%). There were, however, fewer visitors from the UK in 2019/20 and more visitors from overseas. In particular, there has been an increase in visitors from Europe (from 6% to 13%).
- The proportion of visitors from overseas peaked in summer, with over a quarter of visitors (27%) in June to August coming from Europe (17%) or the rest of the world (10%). In contrast, during the winter months almost three quarters of visitors were from Scotland.

## Origin of visitors



Base (All visitors, excluding residents for 2019/20): 2015/16 709; 2019/20 2,196

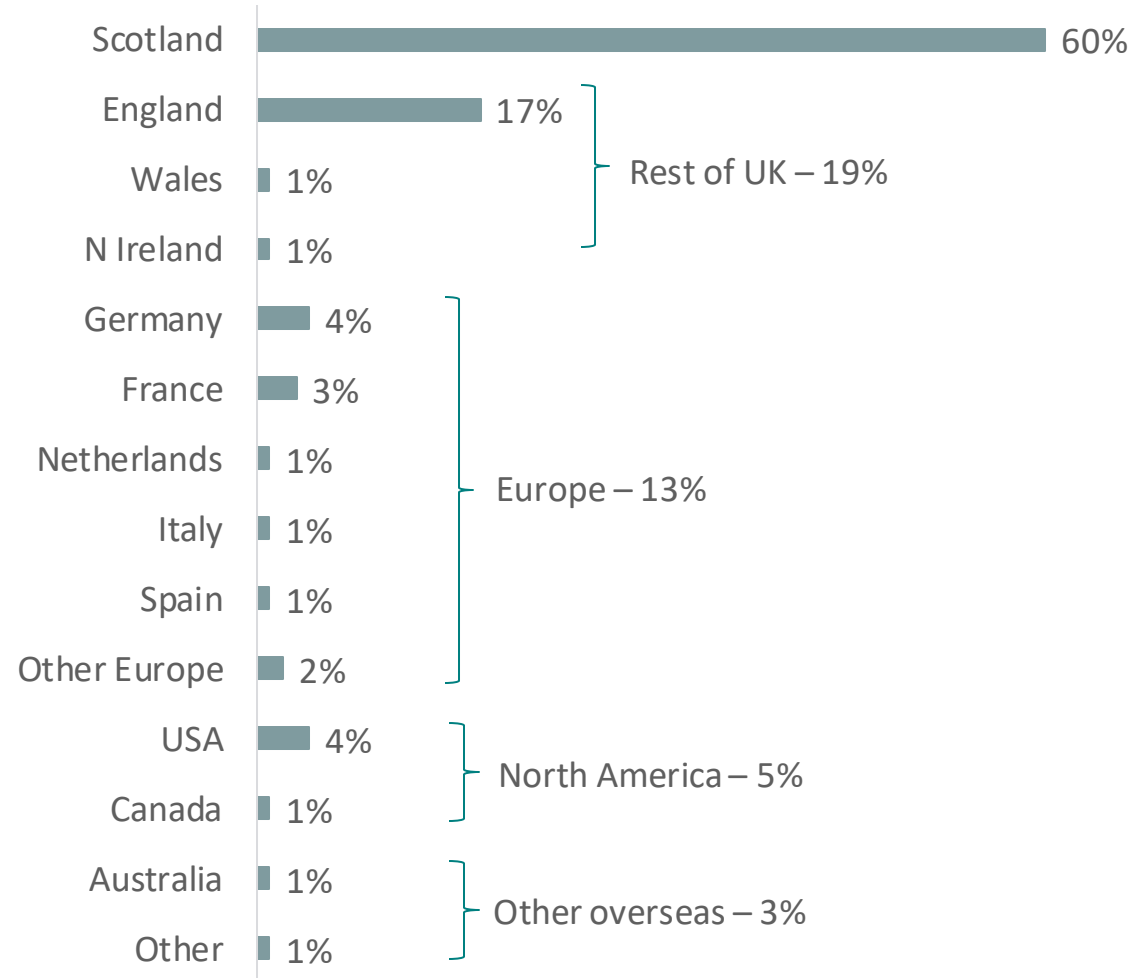
\*2015/16 data includes residents

# Visitor profile

## Origin

- Outside of the UK, the largest market for visitors is Europe. In total, 13% of visitors to the Loch Lomond and Trossachs National Park 2019/20 were from Europe.
- The most prevalent European countries were Germany (4%) and France (3%).
- The USA accounted for 4% of visitors, while 1% were from Canada and 1% from Australia.
- Visitors from Europe tended to be younger than those from elsewhere – 31% were aged 18 to 34 compared to 22% of visitors from Scotland, 16% of those from the rest of the UK and 16% from North America.

## Origin of visitors

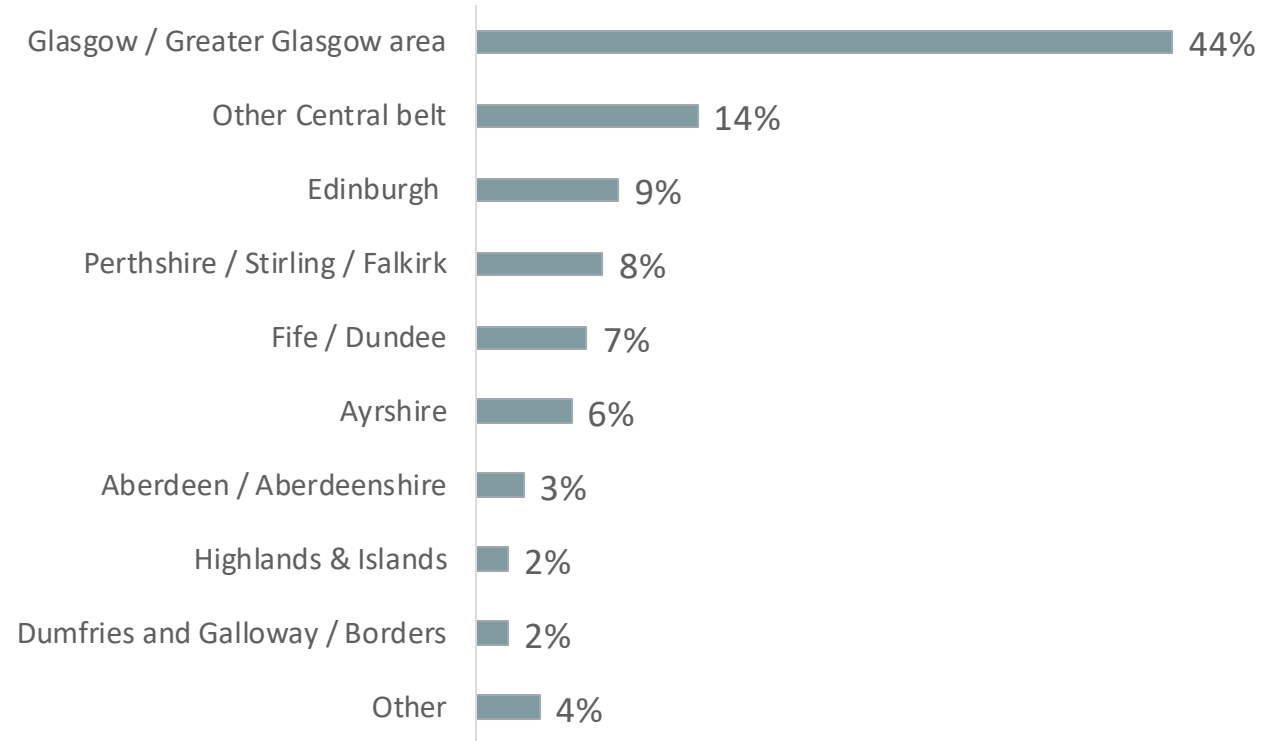


# Visitor profile

## Origin

- The largest proportions of visitors from Scotland came from areas within a close proximity of the Park, especially the Greater Glasgow area (44%).
- One in seven Scotland visitors were from other central belt locations, while around one in ten came from Edinburgh or from the Perthshire/Stirling/Falkirk area.

## Origin – Scotland visitors



Base (All Scotland visitors, excluding residents): 1,307

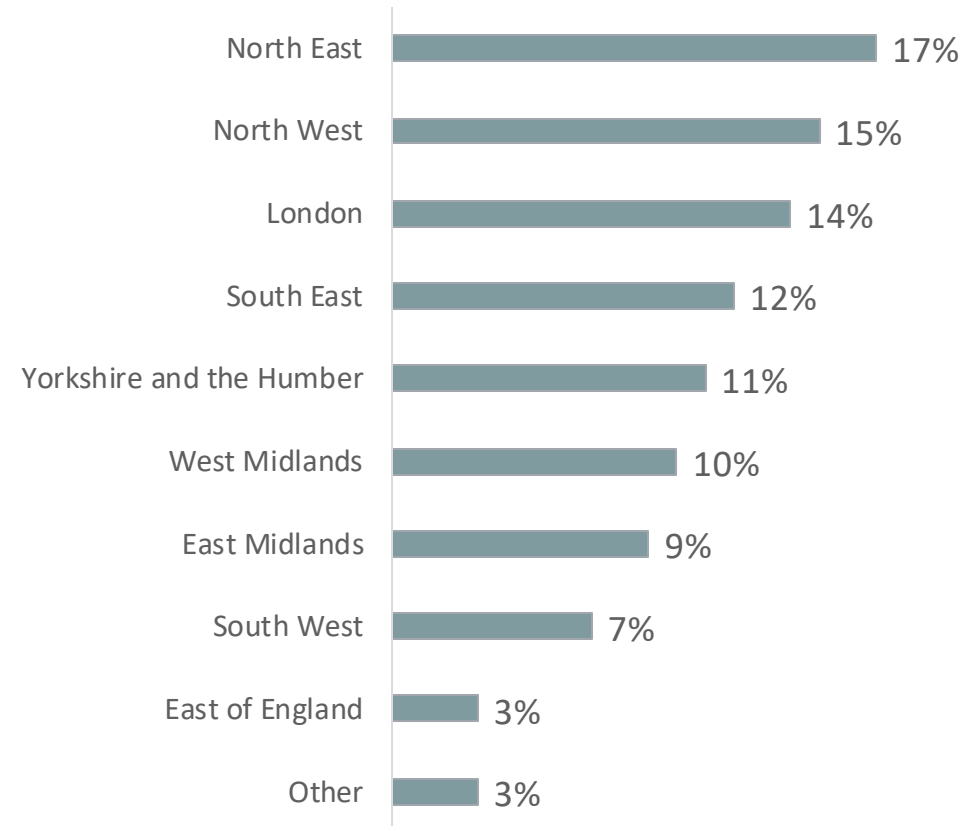


# Visitor profile

## Origin

- Visitors from England came from a variety of regions.
- The top origin locations were those closest to Scotland – the North East (17%) and the North West (15%). However, a significant proportion also came southern England, including London (14%) and the South East (12%).

## Origin – England visitors



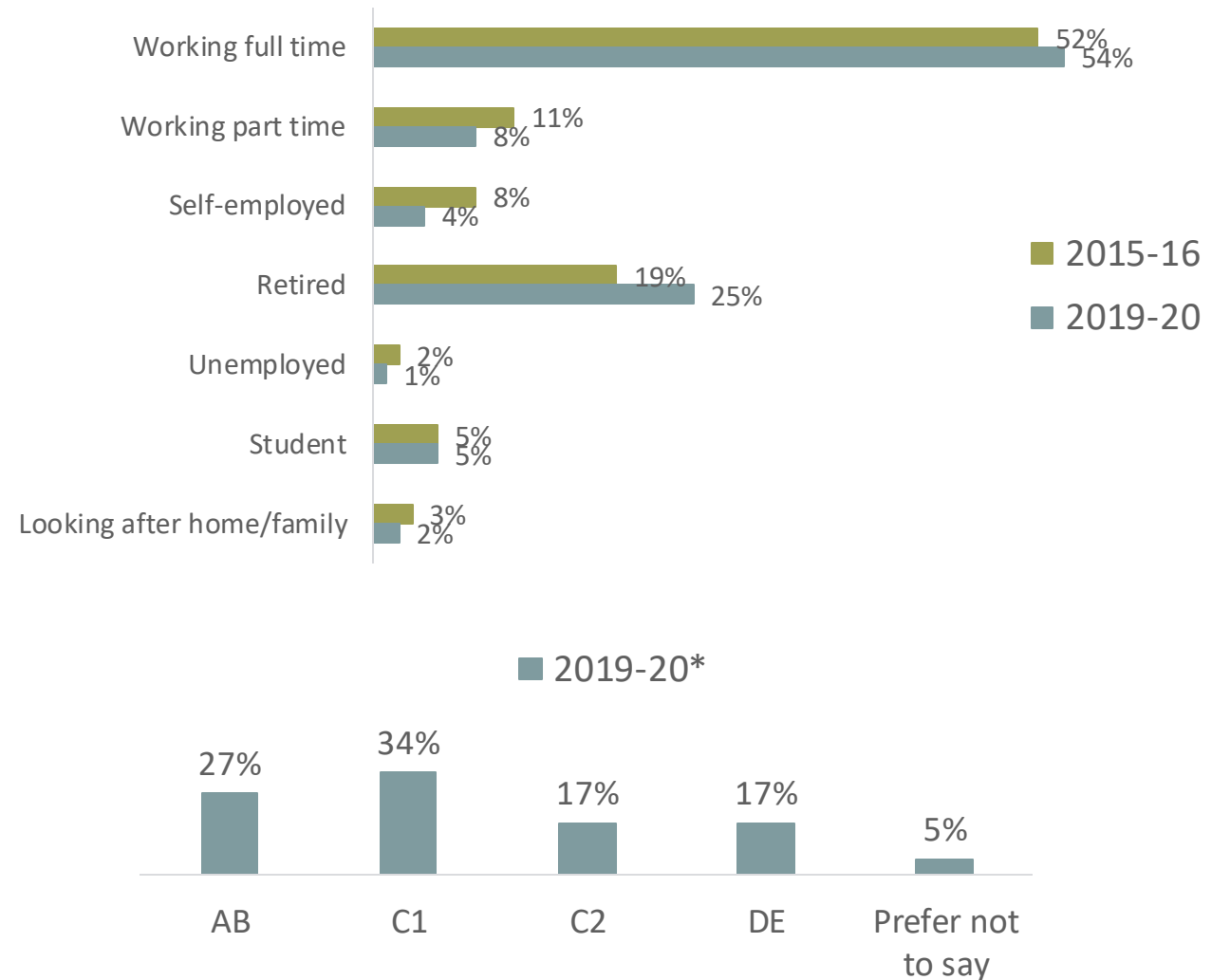
Base (All England residents): 377

# Visitor profile

## Economic

- There was a higher proportion of respondents within the more affluent socio-economic groups in the total sample of visitors and residents, with 27% within the AB group and 34% in C1.
- Visitors from overseas were more likely to be in the higher ABC1 socio-economic groups (76%) than those from Scotland (56%) or the rest of the UK (61%).
- Two thirds (66%) of respondents were in employment while one quarter were retired. Very few were unemployed, students or looking after home/family.
- Visitors from Scotland (25%), the rest of the UK (30%) and North America (36%) were more likely to be retired than those from Europe (10%).
- The working status findings were very similar to 2015/16 with a slight decrease in the proportion in employment (71% in 2015/16 to 66% in 2019/20) and an increase in those retired (19% in 2015/16 to 25% in 2019/20).

## Working status and socio-economic group



\*Differences in data collection methods mean that comparisons to 2015/16 for SEG are not possible.

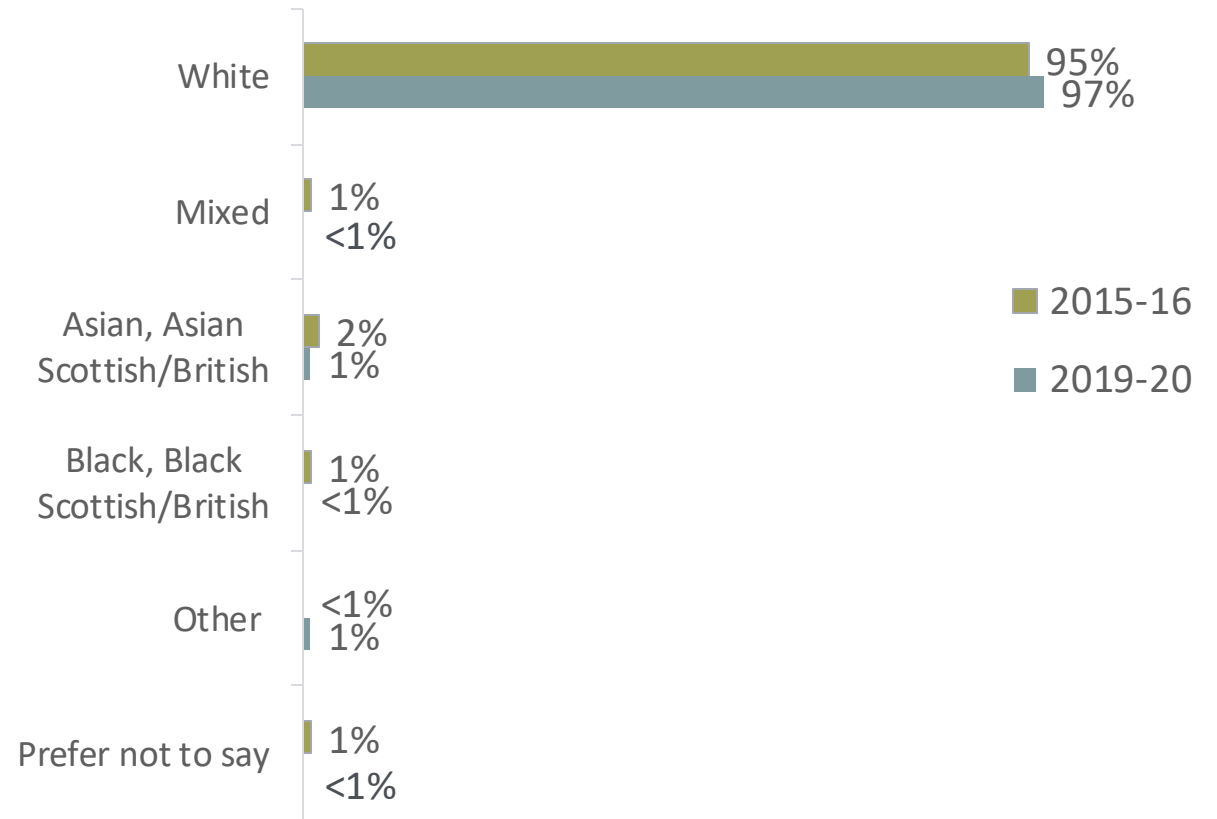
Base (All): 2015/16 709; 2019/20 2,265

# Visitor profile

## Ethnicity

- In total, 2.5% of visitors to the Loch Lomond and Trossachs National Park in 2019/20 were of Black, Asian or minority ethnic groups.
- This finding is similar to 2015/16 when 3.5% were from Black, Asian or minority ethnic groups (this difference is not statistically significant).
- The largest proportion of ethnic minority visitors was from overseas. Amongst overseas visitors, 8% were from Black, Asian or minority ethnic groups – 3% of North American visitors, 6% of European visitors and 30% of visitors from the rest of world. For Scotland and rest of UK visitors, only 1% were from Black, Asian or minority ethnic groups.

## Ethnic group

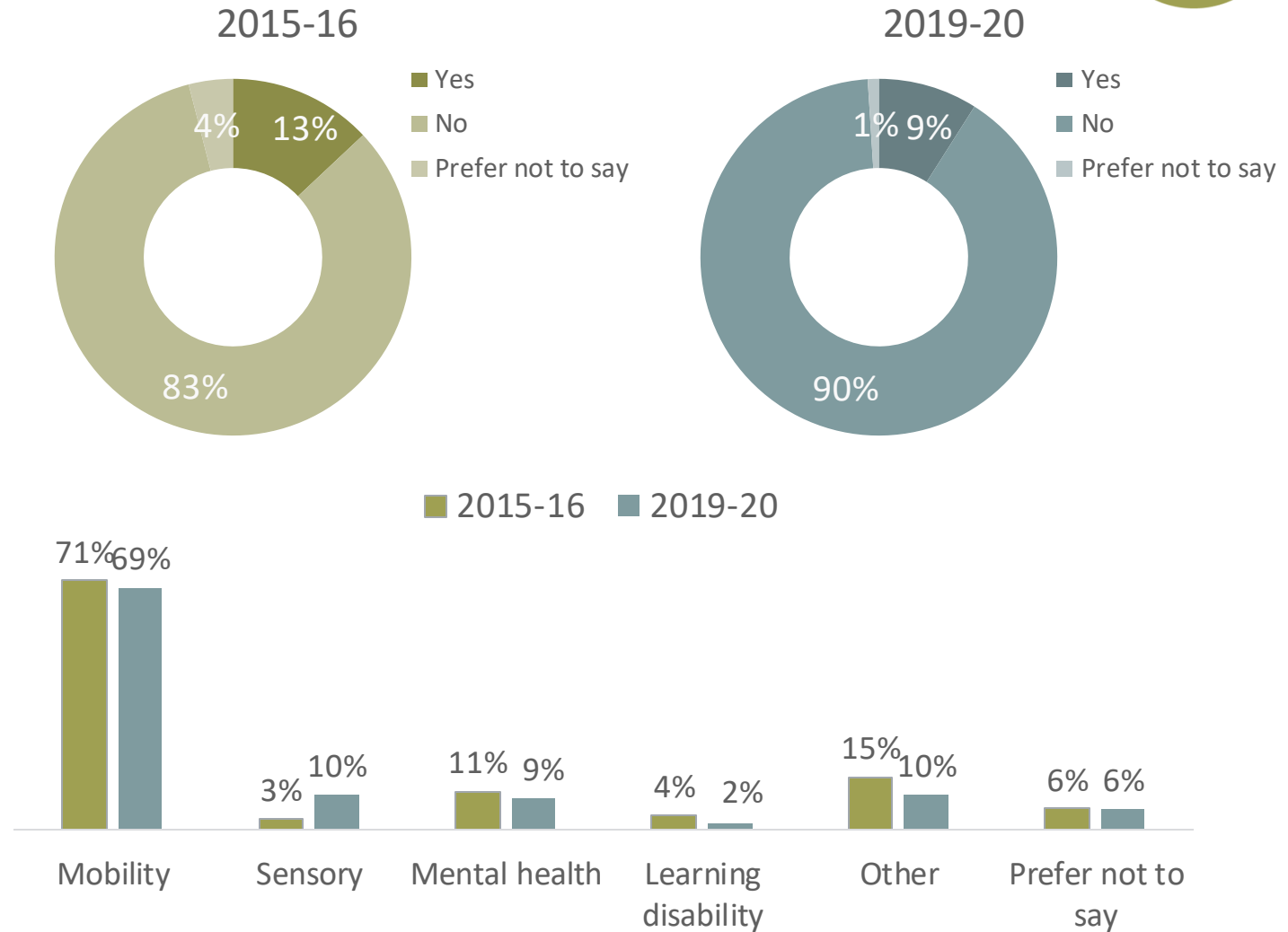


# Visitor profile

## Health

- Almost one in ten (9%) visitors to Loch Lomond and the Trossachs in 2019/20 reported that they, or someone in their group, had a long term health condition or disability.
- This proportion is slightly lower than in 2015/16 when 13% reported that they or someone in their group had a health condition or disability.
- Visitors from Scotland (10%) and the rest of the UK (10%) were more likely to have a health problem than those from overseas (5%).
- The most common health conditions were mobility related (69%). One in ten of those with a health condition reported it as being a sensory impairment and/or a mental health condition. There has been an increase in the proportion mentioning sensory impairments compared to 2015/16.

## Health problem or disability



Base (All): 2015/16 709; 2019/20 2,265

Base (Those who have health condition/disability): 2015/16 87; 2019/20 207

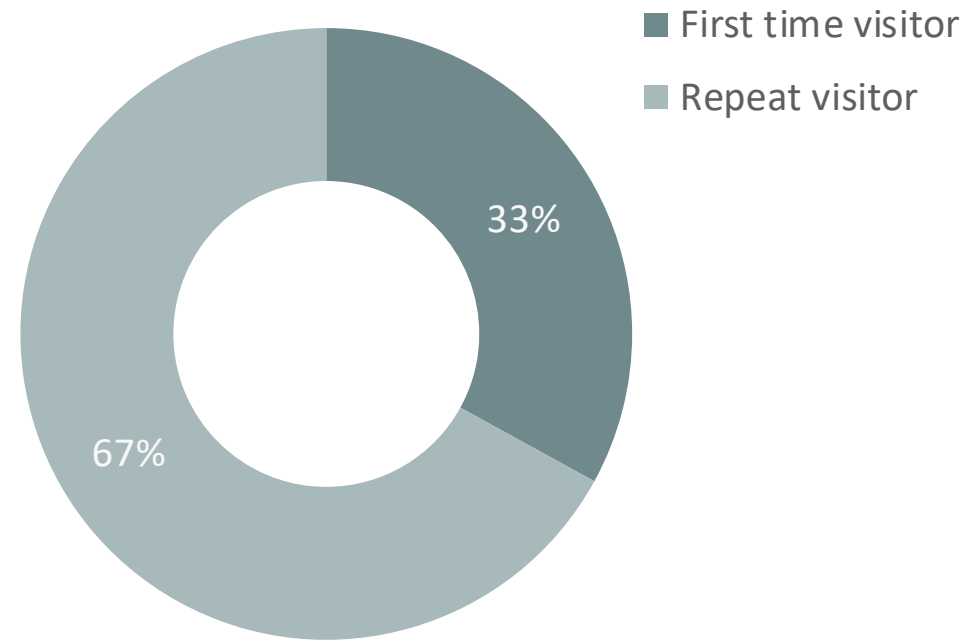
Q39. Could you tell me whether you or any of the people in your group have a long term health condition or disability that affects your / their day to day activities? Q40. How would you class this disability or long term health condition?


# Visitor profile

## First time/repeat visitors

- One third of all visitors in 2019/20 reported that it was their first ever visit to Loch Lomond and The Trossachs National Park.
- As we would expect, visitors from Scotland (12%) and the rest of the UK (42%) were less likely to be first time visitors than those from overseas (83%).
- Younger respondents were more likely to be first time visitors than those in older age groups. Within the 18 to 34 age group, 42% were visiting Loch Lomond and the Trossachs for the first time, compared to just 22% of those aged 65+.

## Ever visited Loch Lomond and The Trossachs before



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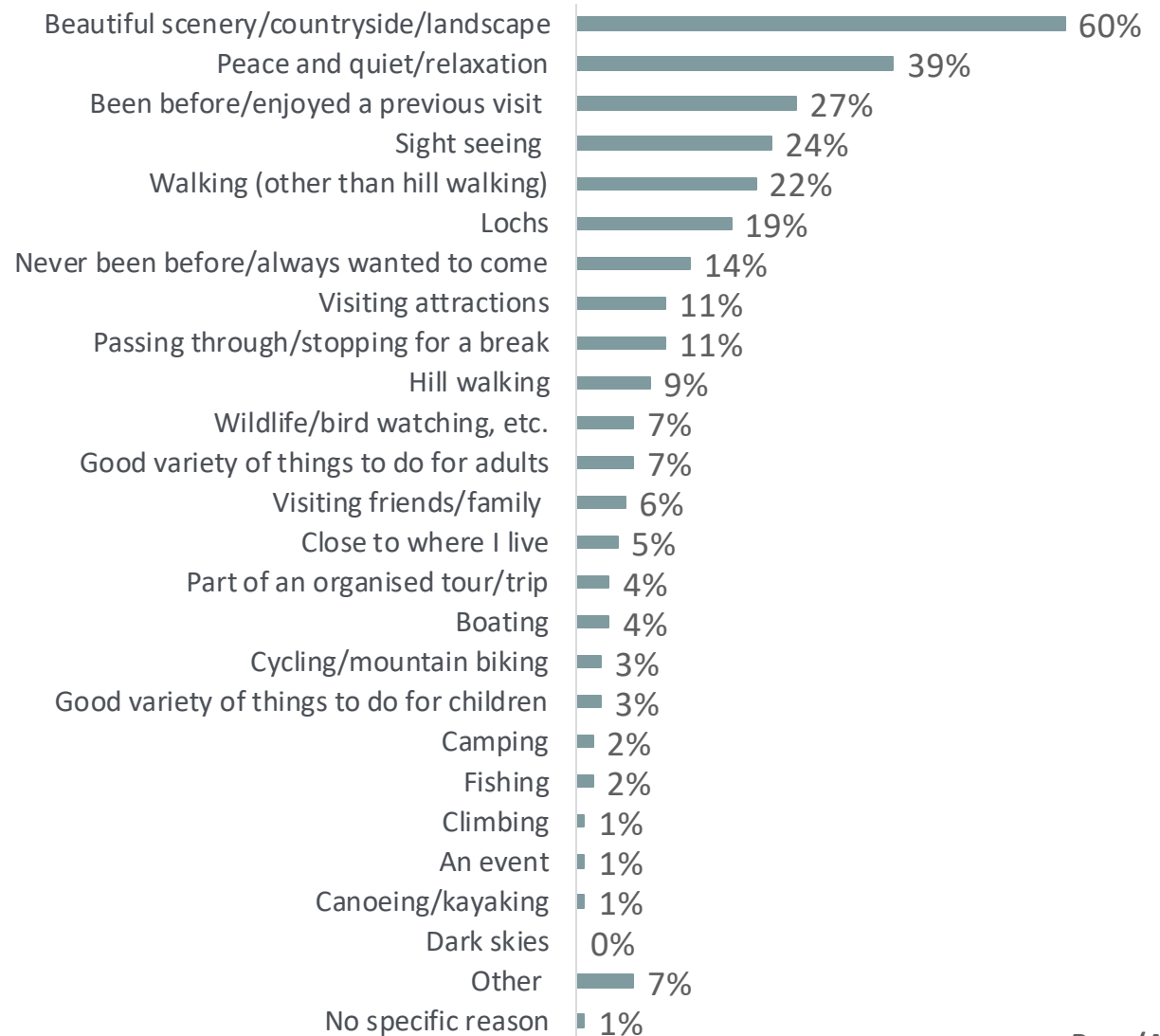
# Motivations to visit Loch Lomond and Trossachs area

# Motivations to visit

## Why visit?

- The main motivation for people visiting Loch Lomond and The Trossachs National Park was to enjoy the beautiful scenery – mentioned by 60% of respondents. The next most important reason for visiting was to experience peace and quiet (39%), while around a quarter reported that they chose LLTNP for their trip because they had enjoyed a previous visit, to do some sightseeing and/or to enjoy walking in the area.
- The beautiful scenery was particularly important to overseas visitors (73%) and those from the rest of the UK (64%) compared to visitors from Scotland (54%). Peace and quiet was more likely to be selected by visitors from Scotland (40%), the rest of the UK (43%) and Europe (37%) than those from North America (24%) or other overseas (26%). A higher than average proportion of Europeans were also attracted by walking (32%) and hill walking (20%).
- These motivations correspond with the most popular reasons for visiting Loch Lomond and the Trossachs in 2015/16. Direct comparisons of proportions mentioning each motivation are not possible due to the different ways the questions were asked in each survey.

## Reasons for visiting Loch Lomond and the Trossachs area

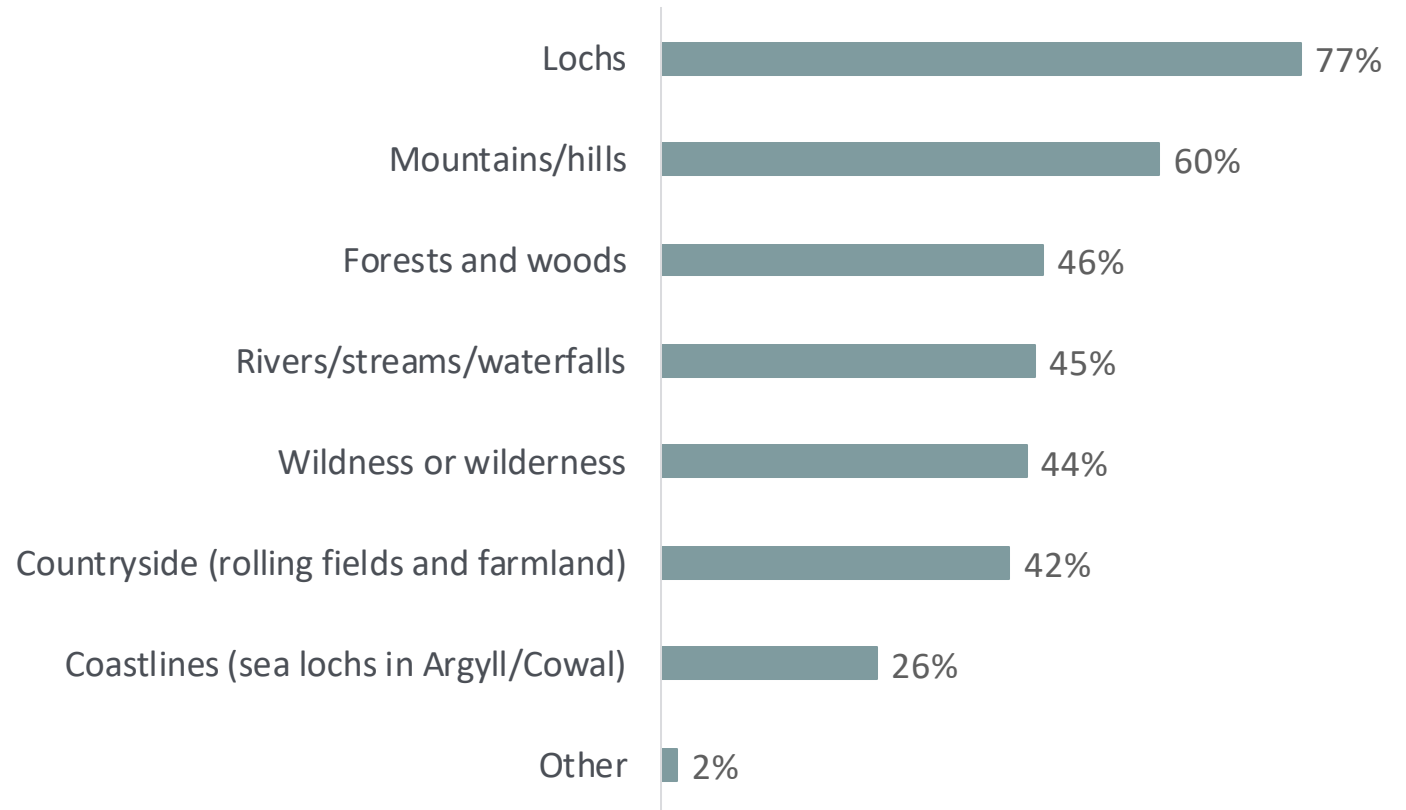


# Motivations to visit

## Why visit?

- Respondents who stated that they were motivated to visit the National Park because of the beautiful scenery/landscape were asked a follow-up question to discover more specifically what aspects of the landscape they enjoyed.
- The lochs within the National Park were the main draw – over three quarters of those visiting for the scenery stated they wanted to visit the area to see lochs.
- The mountains and hills were mentioned by 60%, while just less than half referred to forests/woods, rivers/streams/waterfalls or the general wildness of the area.
- Visitors from the rest of the UK were particularly likely to have said that the wildness/wilderness influenced their decision to visit the area – 51% stated this.

## Aspects of scenery/landscape liked



Base (Those who visited for scenery/landscape): 1,353

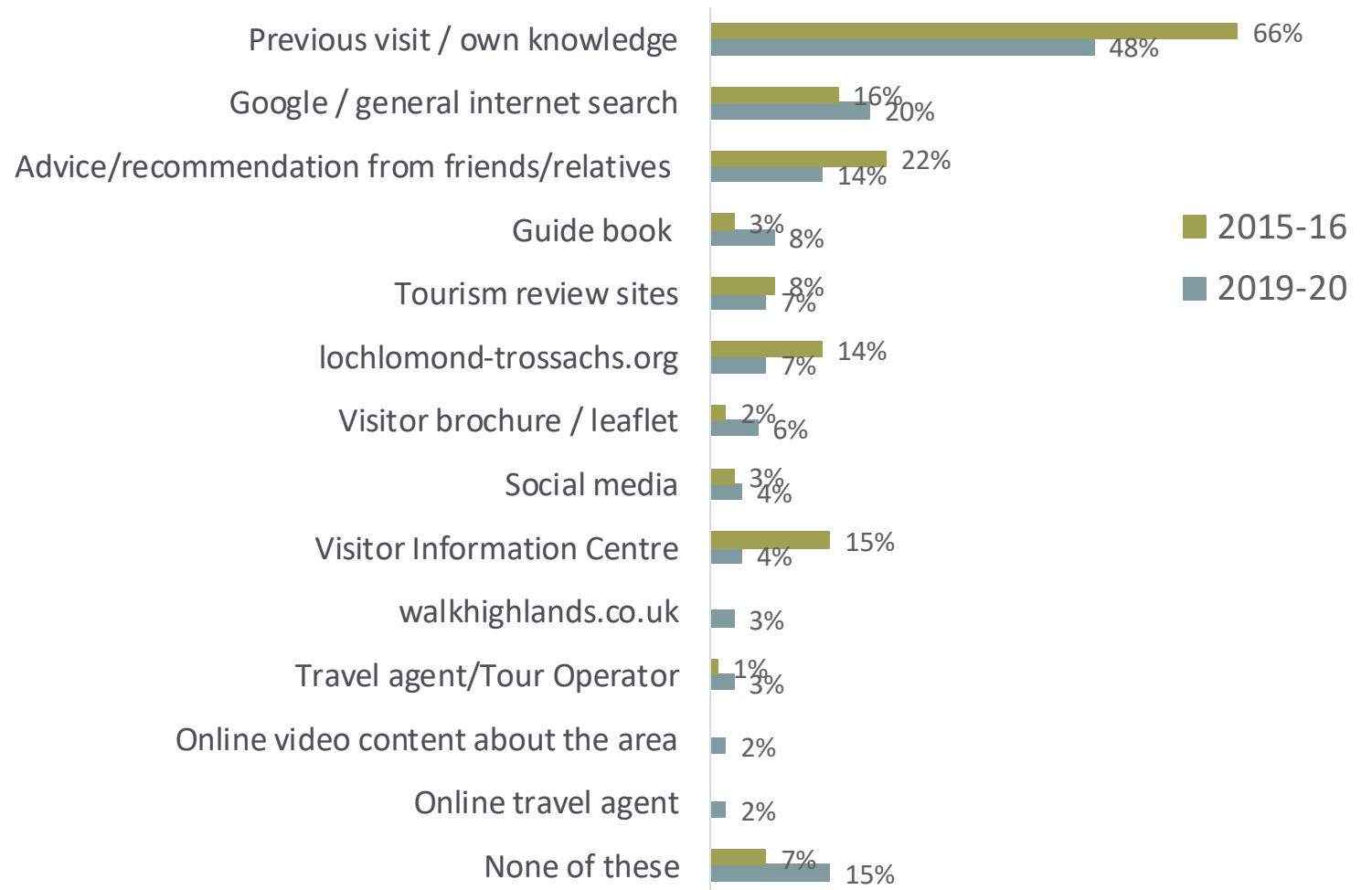


# Motivations to visit

## Information & inspiration


- When asked where they sought information or inspiration for their visit to LLTNP, almost half of respondents reported that they simply relied on their own knowledge, often from a previous visit.
- For those who did seek out information, the main source was the internet (32% in total), with 20% mentioning Google or other internet searches and 7% using tourism review websites. Some respondents also specifically mentioned lochlomond-trossachs.org (7%) or walkhighlands.co.uk (3%). A significant proportion (14%) also reported that they sought advice and recommendations from friends or relatives before their visit.
- Visitors from the rest of the UK and overseas were more likely to use a number of sources than those from Scotland, who often said they simply used their own knowledge. Overseas visitors in particular (26%) were more likely than those from Scotland (1%) or the rest of the UK (8%) to use guidebooks (particularly Europeans). They were also more likely to mention internet searches (40%), advice from friends/relatives (26%), travel agents (10%) and information centres (10%).
- A similar pattern of response was seen in 2015/16, although larger proportions mentioned some sources, such as own knowledge, advice/recommendations and lochlomond-trossachs.org. These differences are likely to be due to the different methods of data collection whereby this question appeared on the online survey in 2015/16 and was asked by an interviewer in 2019/20. It is likely to be significant, however, that there has been a large decrease in those mentioning visitor information centres in 2019/20 (4%) compared to 2015/16 (15%).

## Sources of information and inspiration for visiting



Sources cited by 1% or less not shown.

Base (All): 2015/16 709; 2019/20 2,265



# Trip profile

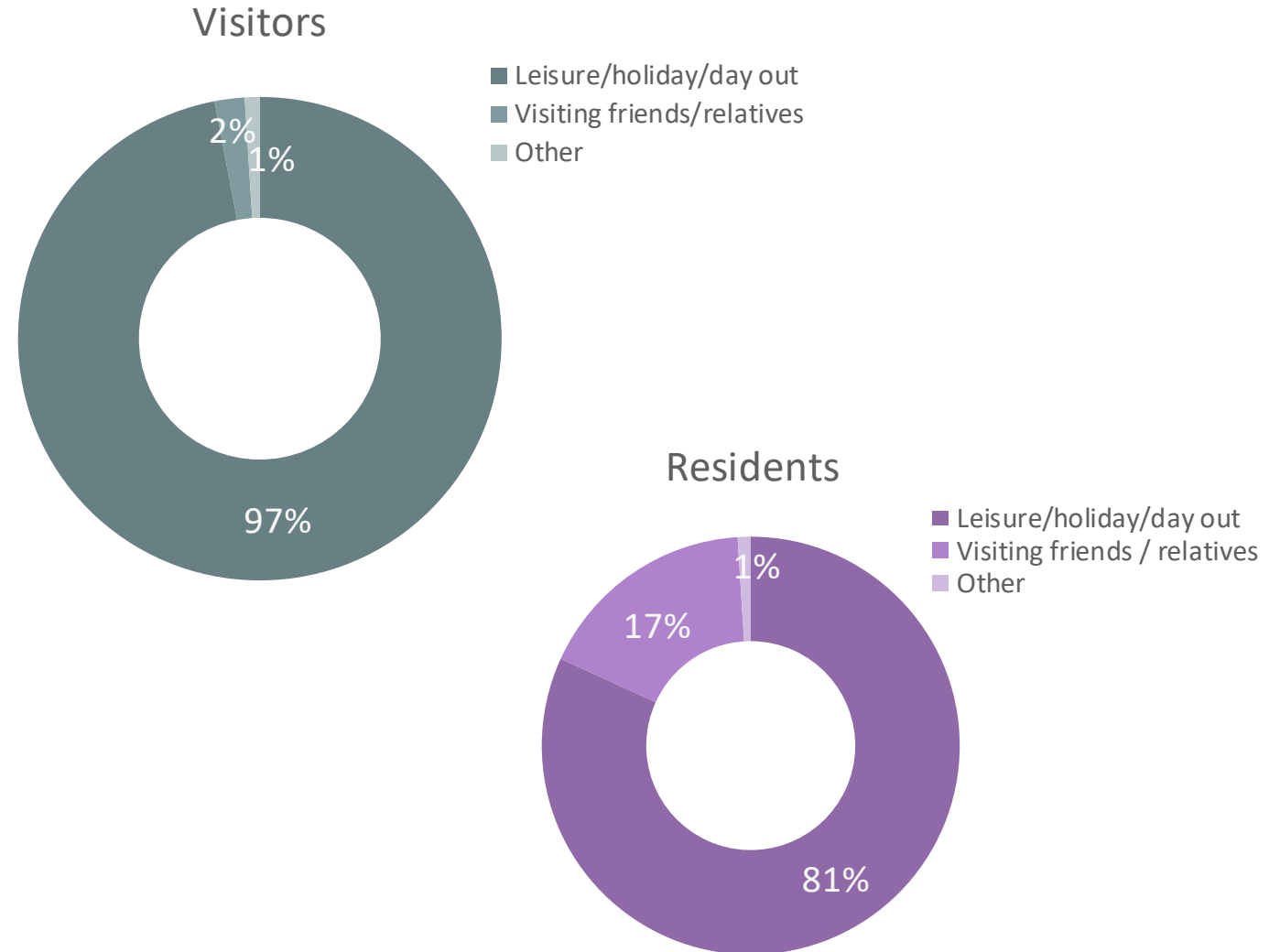
# Trip profile

## Type of trip

- Screener questions were used at the start of the survey to determine the reasons why people were visiting the area. Those visiting for business/work or for personal business (such as food shopping, post office, doctors) were screened out.
- As we would expect, the predominant reason for visiting for both residents and visitors to the Loch Lomond and the Trossachs area was a leisure trip, such as a day trip, short break or holiday.
- A number of residents were visiting friends or relatives as part of their trip (17%), while 1% were combining business and leisure in one trip.

Q1 (visitors). Which of these reasons best describes your reason for visiting the National Park today? Q2 (residents). Which of these reasons best describes your reason for visiting *[sample location]* today?

## Reason for visiting



\*Question not asked in 2015/16

Base (visitors): 2,196  
Base (residents): 69

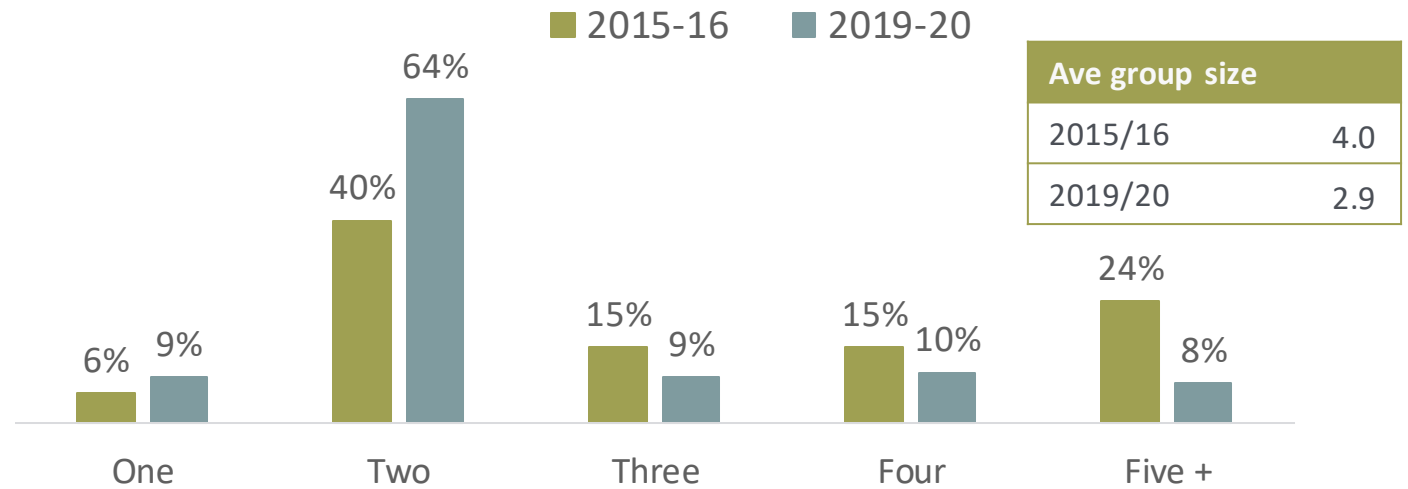
# Trip profile

## Party composition

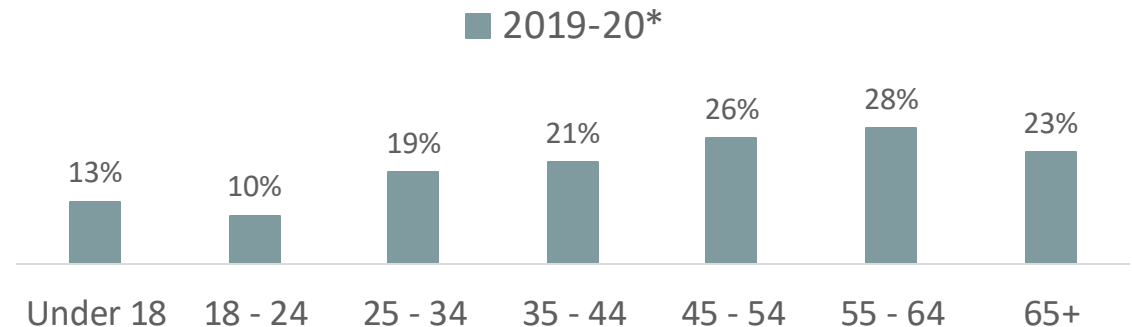
- Almost two thirds of respondents were visiting Loch Lomond and The Trossachs National Park in a group of two people, while one in ten were visiting alone, one fifth had three or four people in their group and 8% had five or more. The average total group size was 2.9 people.
- A higher proportion of visitors in 2019/20 were visiting in a group of two people and fewer were travelling in larger groups of four or more compared to 2015/16. Consequently, the average group size was lower in 2019/20 (2.9) than in 2015/16 (4.0)\*.
- The age profile of people in the group tends towards older age groups, with 26% aged between 45 and 54 years, 28% 55 to 64 and 23% aged 65 or older.
- In total, 13% of respondents reported having children or young people under the age of 18 in their group. The ages of children were evenly spread amongst those reporting having pre-school children (5% under 5 years), primary aged children (6% aged 5 to 11 years) and secondary aged young people (5% aged 12 to 17 years).

\* It is possible that the online method used in 2015/16 has resulted in more people counting all members of larger tour groups as being part of their party. The interviewer-led method used in 2019/20 meant that respondents could be prompted to only include members of their immediate party.

## Number of people in party



## Ages of people in party



\*Question asked differently in 2015/16

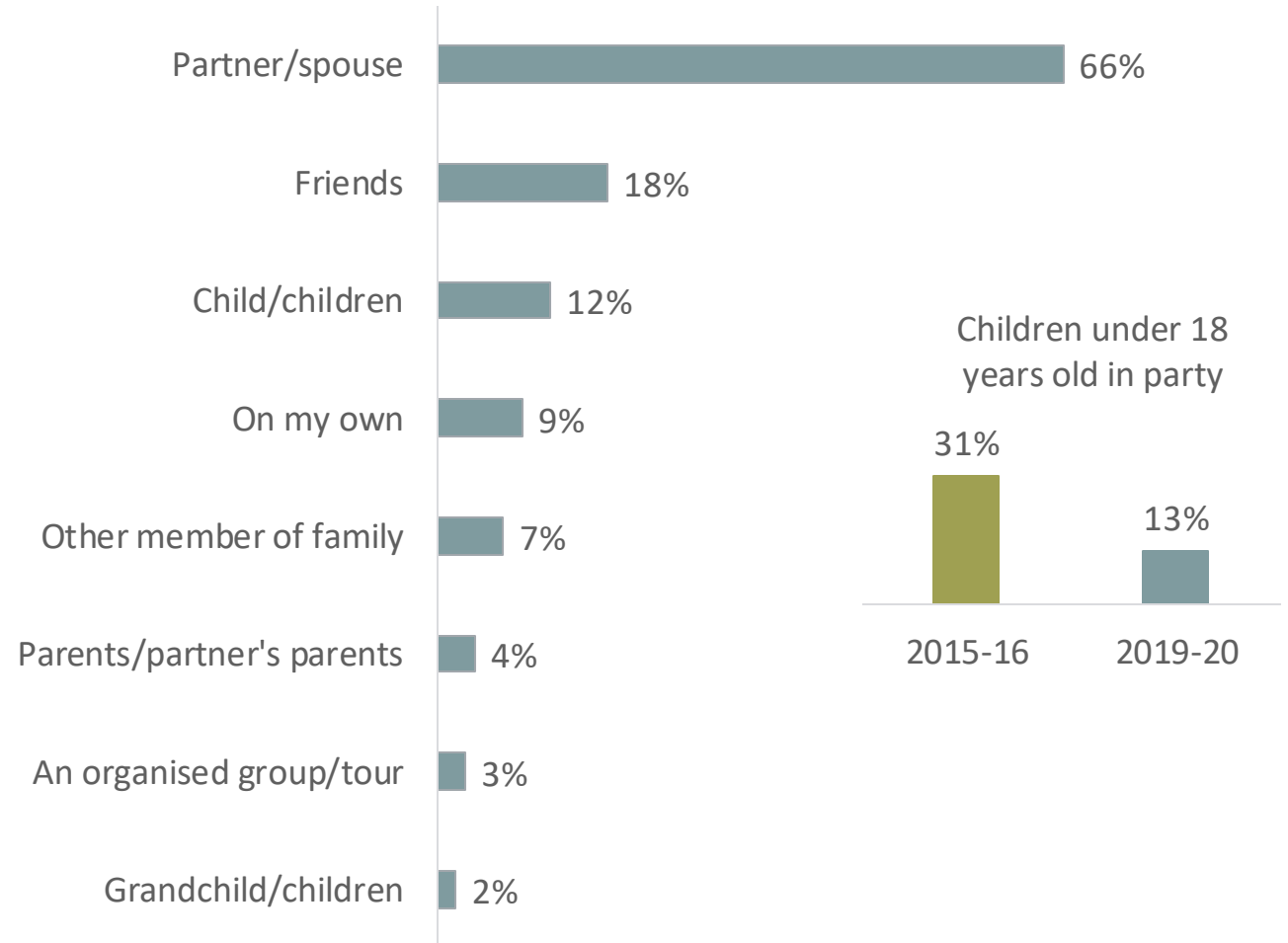
# Trip profile

## Party composition

- Two thirds of respondents reported that they were visiting the National Park with their partner/spouse, while just less than one fifth were visiting with friends.
- Just over a tenth of respondents (13%\*) reported having children aged under 18 in their party. As we would expect, visitors in the 35 to 44 (27%) and 45 to 54 (17%) age groups were more likely to be visiting with children than those in other age groups.
- Younger respondents (28% of 18 to 34 year olds) were more likely than those in older age groups to say they were visiting with friends.
- Compared to 2015/16 there has been a significant decrease in the proportion of respondents reporting that they have children in their group.

\* A slightly higher proportion of respondents reported having young people under 18 years old in their party than said they had 'child/children' in their party. This is likely to be because some respondents did not consider older teenagers (16/17 year olds) as children.

## Whom visited with



2015 data not directly comparable due to changes in codes and response type (i.e. single coded in 2015 vs multi-coded in 2019).

Base (All): 2015/16 694 (excluding no replies);  
2019/20 2,265 29

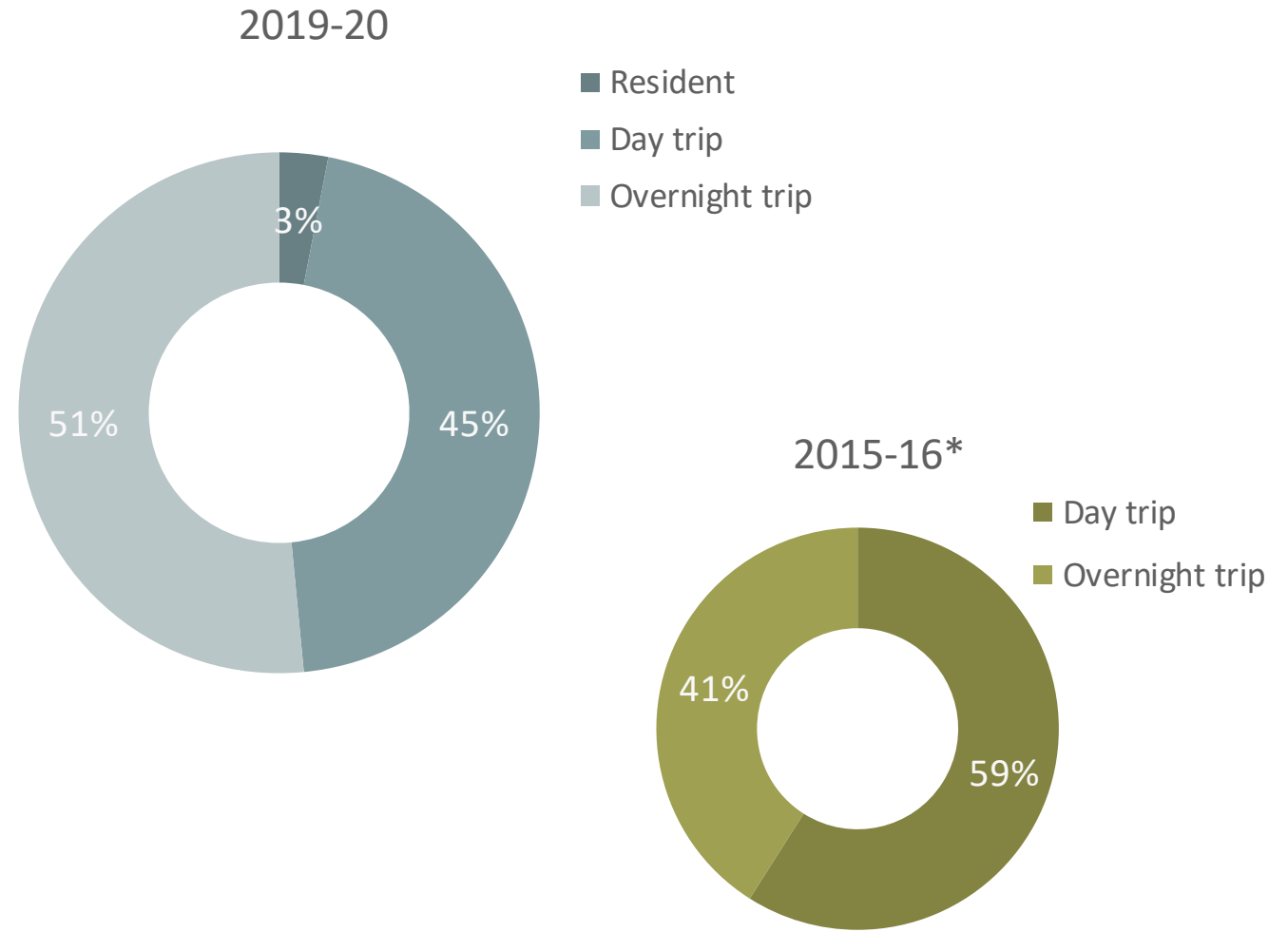
# Trip profile

## Type of visitor

- Half of respondents were overnight visitors, with 45% on a day trip from home and only 3% being residents.
- There were more overnight visitors in 2019/20 (51%) compared to 2015/16 (41%).

SQ2. Postcode; Q3. Are you on a day trip from home, or are you staying overnight or on holiday away from home? Q4. How many nights IN TOTAL will you be spending away from home on this trip?

## Type of trip



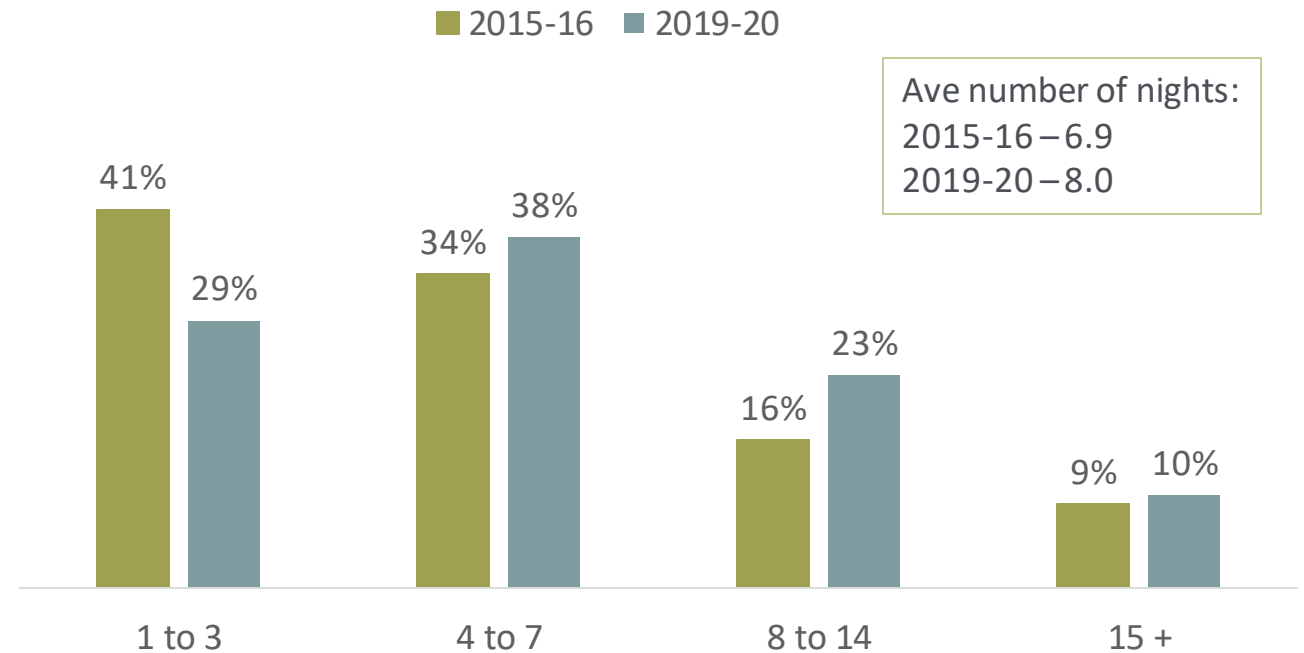
\*Difference: 'residents' not differentiated in 2015/16 so most likely included in day trippers figure

# Trip profile

## Number of nights

- Overnight visitors were asked how many nights they spent away from home in total for their trip, and in the Loch Lomond and the Trossachs area. In total, two thirds of overnight visitors were on a holiday of up to one week, with 29% on a trip of 1 to 3 nights and 38% staying away from home for 4 to 7 nights. The overall average **total trip** length was 8 nights.
- There were more people on longer holidays in 2019/20 (33% were staying more than a week) compared to 2015/16 (25%). This means the average number of nights is higher at 8.0 nights compared to 6.9 in 2015/16. This difference may be partly due to the larger number of overseas visitors in 2019/20.

## Number of nights – total trip



Base total trip (all overnight visitors): 2015/16 709; 2019/20 1,169

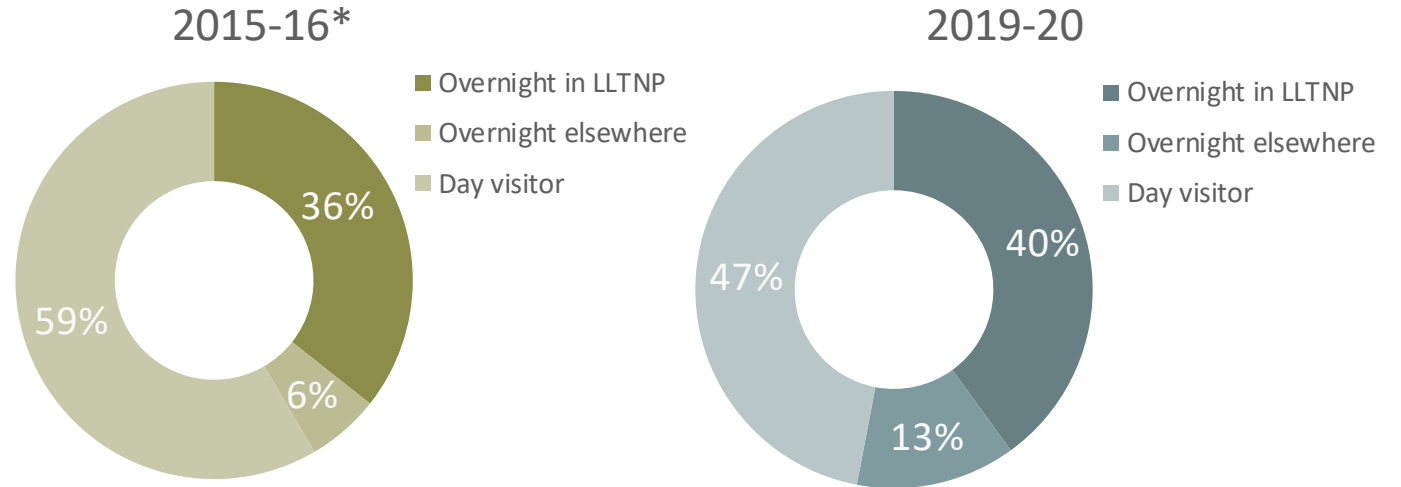
# Trip profile

## Number of nights

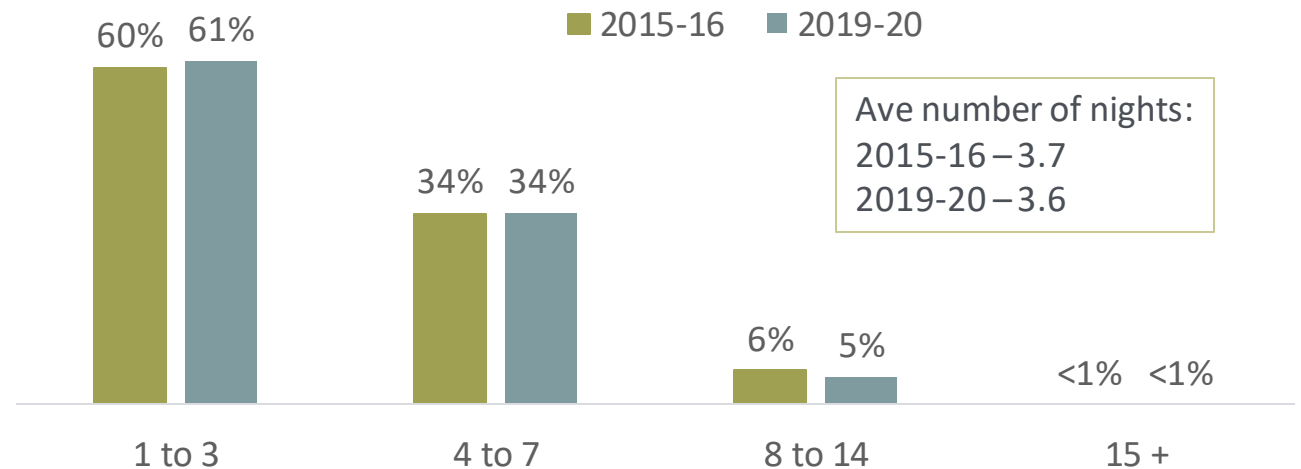
- Three quarters of those who were on a holiday or short break reported that they stayed overnight in the Loch Lomond and the Trossachs area during their trip – this is equal to 40% of all visitors. Most of these visitors stayed for a short break of 1 to 3 nights (61%), with an average 3.6 nights.
- These findings are similar to 2015/16 when 36% of all visitors reported that they were staying overnight in the Park area and the average length of stay was 3.7 nights.
- As a proportion of all visitors, rest of UK (69%) and overseas visitors (67%) were more likely to be staying in the Park area than those from Scotland (20%). The length of stay also tended to be longer – 4.2 nights for rest of UK visitors, 3.8 nights for overseas visitors and 2.9 nights for Scotland visitors.
- Visits in the summer (ave. 3.9 nights) and spring (3.6 nights) months tended to be longer than in autumn (3.2 nights) and winter (3.1 nights).



## Overnight stay in Loch Lomond and the Trossachs area – all visitors



## Number of nights – Loch Lomond and the Trossachs



\*Difference: 'residents' not differentiated in 2015/16 so day visitors figure likely to include some residents

Base overnight in LLT (all visitors): 2015/16 709; 2019/20 2,196  
 Base nights in LLT (all overnight in LLT): 2015/16 240; 2019/20 879 32

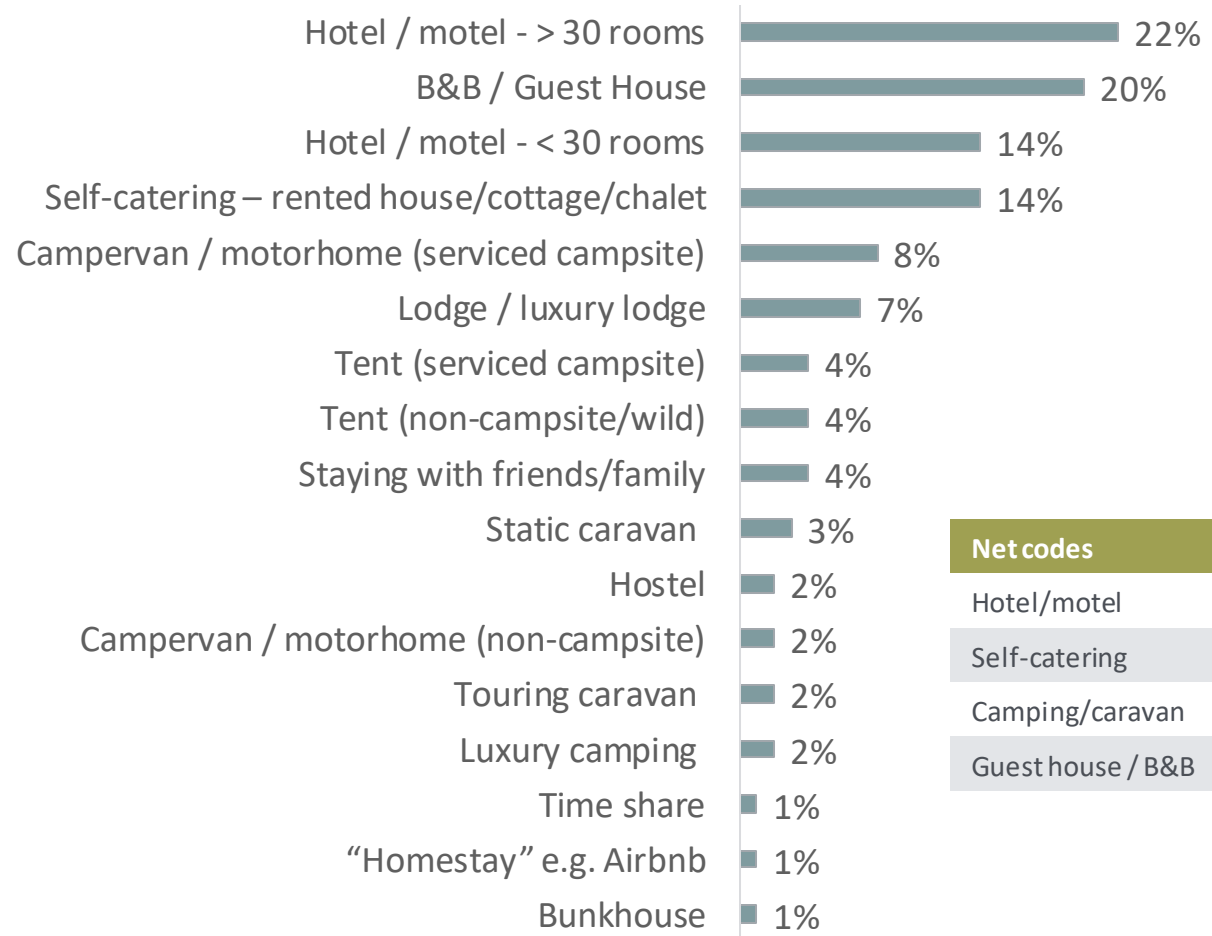


# Trip profile

## Accommodation

- Hotels was the most popular type of accommodation for people staying in the Loch Lomond and the Trossachs area – mentioned by 36% in total.
- B&Bs (20%), self-catering (22%) and camping/caravanning (21%) were all mentioned by around one fifth of those staying overnight in the area. Campervans/motorhomes (10%) and tents (8%) were the most popular type of camping/caravanning.
- Hotels were the most favoured accommodation type for visitors from both the UK and overseas, but those from North America (51%) were particularly likely to choose this option. Self-catering options were more often mentioned by those from Scotland (24%) and the rest of the UK (27%) than overseas visitors (15%). Camping/caravanning was most popular amongst visitors from Scotland (25%) and Europe (23%).
- Younger respondents were more likely to stay in B&Bs (28% of under 45s), camping (31% of under 35s) and hostels (10% of under 35s) than those in older age groups. The older the visitor the more likely they were to stay in a hotel – 51% of over 65s compared to 19% of under 35s.
- The proportions of visitors staying in self-catering accommodation, hotels and camping/caravanning were consistent with 2015/16. However, there has been an increase in those choosing to stay in a guest house / B&B.

## Accommodation in Loch Lomond and Trossachs area – Overnight visitors



Net codes	2015-16	2019-20
Hotel/motel	32%	36%
Self-catering	23%	22%
Camping/caravan	26%	21%
Guest house / B&B	14%	20%

Base (all overnight in Loch Lomond and Trossachs):  
2015/16 240; 2019/20 879

Only accommodation mentioned by at least 1% shown

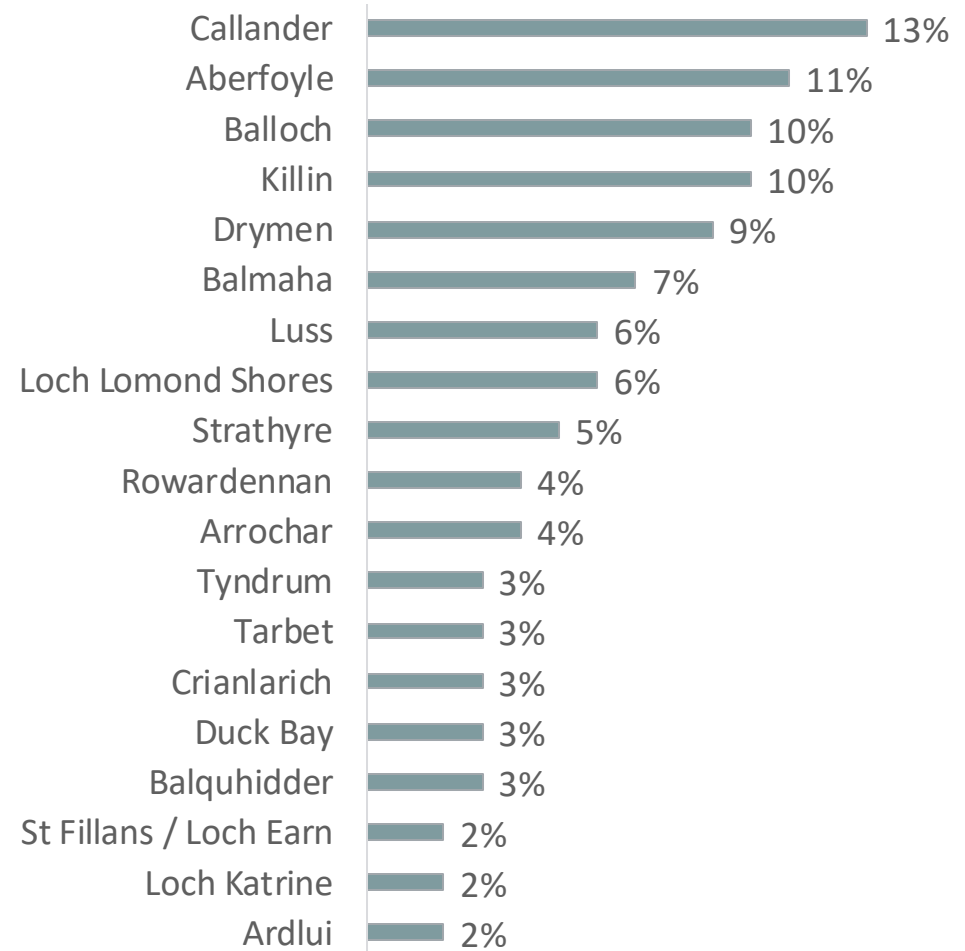
Q16. During your stay in the Loch Lomond and Trossachs area, which type(s) of accommodation have you, or will you use?

# Trip profile

## Areas visited

- The most popular locations for staying in the Park were those within the Trossachs, in particular Callander (13%) and Aberfoyle (11%). In total, 29% of those staying within the area reported they were staying in a Trossachs location.
- East Loch Lomond locations were mentioned by 18%, including Drymen (9%), Balmaha (7%) and Rowardennan (4%). In total, 13% stayed on the west side of the loch, including Luss (6%), Tarbet (3%), Duck Bay (3%) and Ardlui (2%).
- Breadalbane locations, such as Killin (10%), Strathyre (5%), Tyndrum (3%) and Crianlarich (3%) were mentioned by 19%.
- Balloch was mentioned by 10% of overnight visitors, while a further 6% reported that they stayed at Loch Lomond Shores. It is possible that respondents who said that they stayed at Loch Lomond Shores in fact stayed nearby, as there is no accommodation available specifically at this site. People who reported that they were staying at Loch Lomond Shores were interviewed at various locations including Balmaha, Luss, Drymen, Callander and Loch Lomond Shores itself.
- First time visitors were more likely than repeat visitors to stay overnight in a number of locations, including Balloch (15%), Balmaha (12%), Drymen (11%), Loch Lomond Shores (9%) and Rowardennan (6%).

## Areas of national park stayed in – Overnight visitors



Only areas mentioned by at least 2% shown

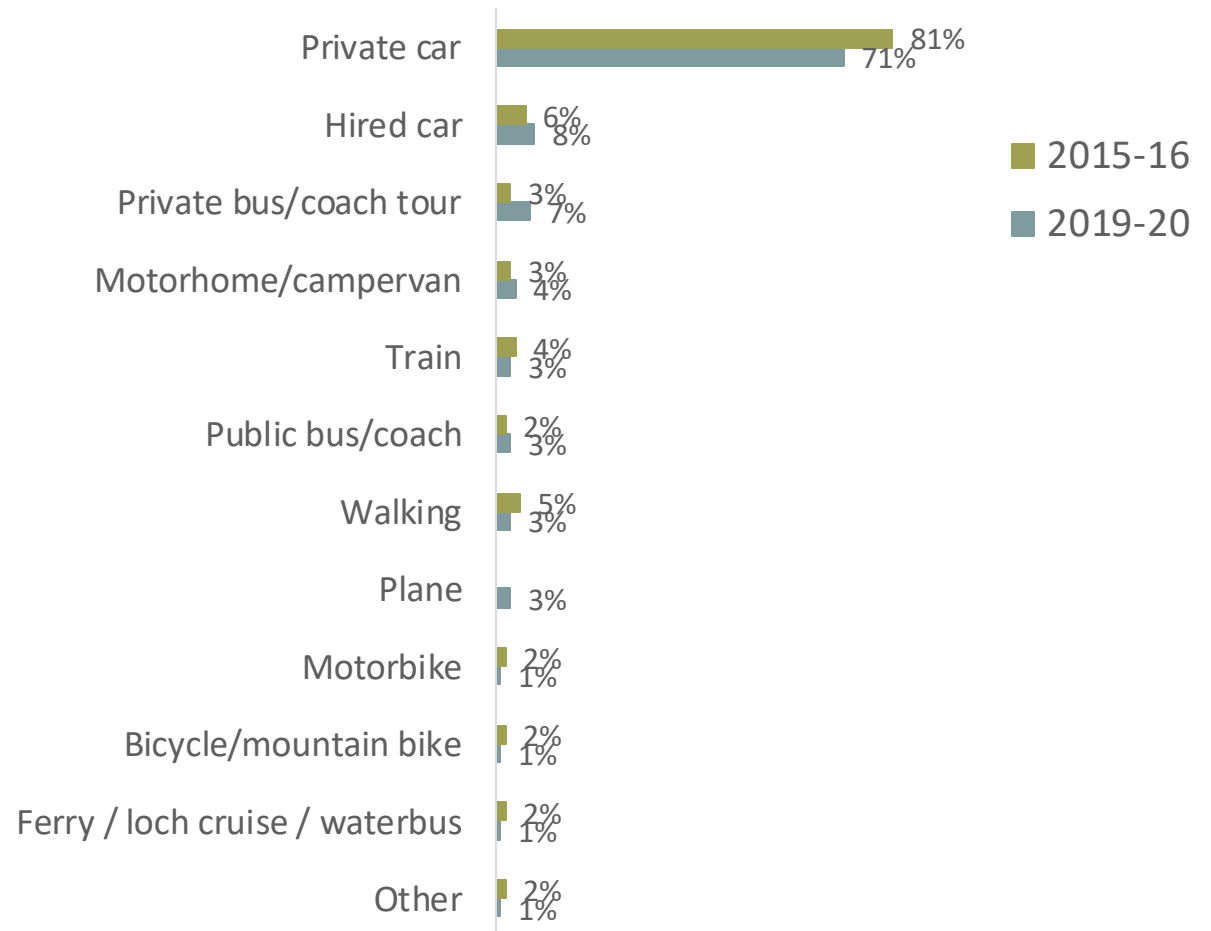
Base (all overnight in Loch Lomond and the Trossachs): 2019/20 879

# Trip profile

## Transport

- The most prevalent method of transport to travel to Loch Lomond and The Trossachs National Park was by car – mentioned by 80% of visitors to the area, with 71% travelling in a private car and 8% using a hired car.
- The next most commonly mentioned method of transport was by coach tour or private bus, mentioned by 7% of visitors.
- Mentions of hire cars were highest amongst overseas visitors – Europe (34%), North America (38%) and the rest of the world (46%). Visitors from North America (24%) and the rest of the world (23%) were the most likely to say that they travelled in a private bus or coach tour.
- Younger respondents were more likely to travel by public transport than those in the older age groups: for example, by train (mentioned by 7% of 18 to 34 year olds) or by bus (6%).
- Since 2015/16 there has been a decrease in use of private cars and an increase in private bus/coach tours, possibly as a result of the increase in overseas visitors.

## Transport to the Loch Lomond and Trossachs area

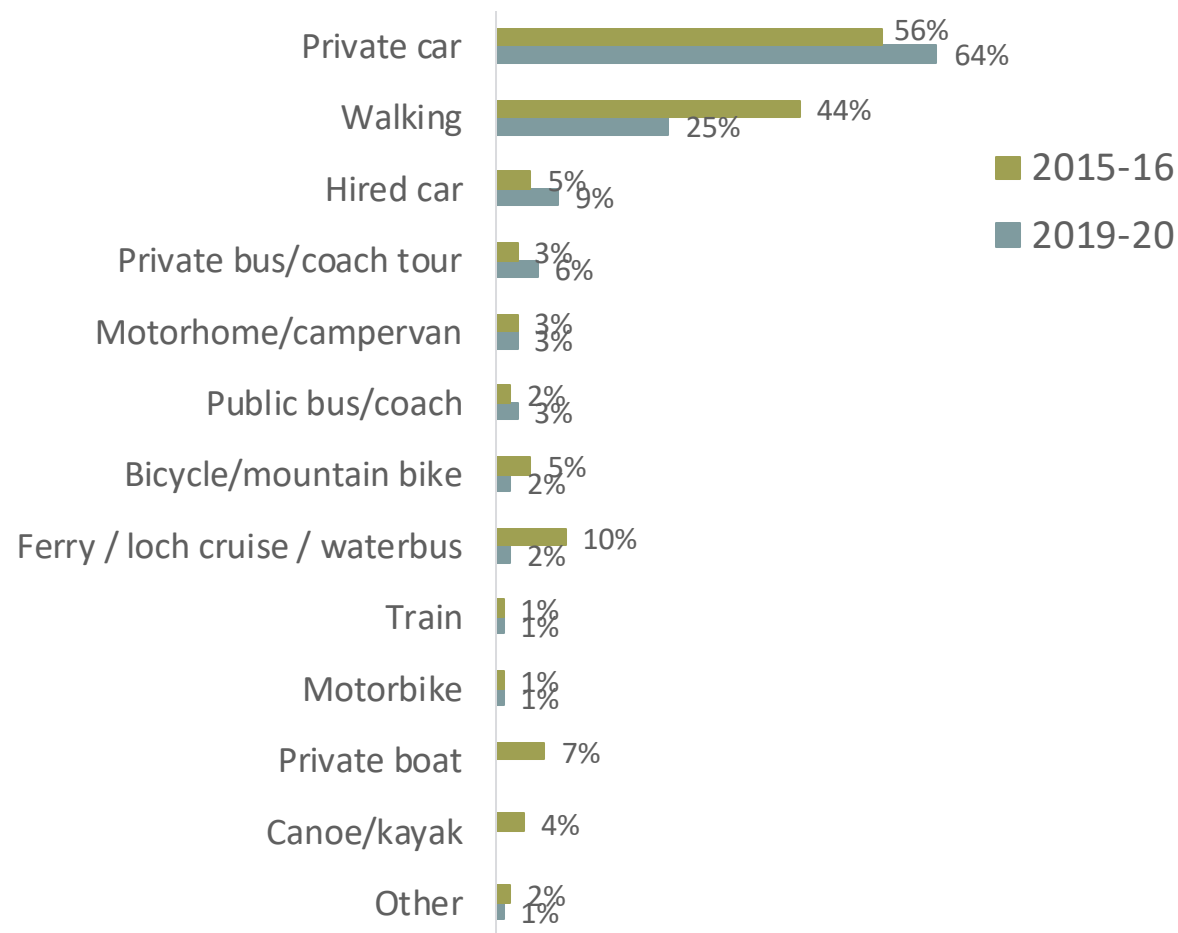


# Trip profile

## Transport

- Travel by car was also the predominant mode of transport within the Loch Lomond and The Trossachs National Park, mentioned by 73% of all respondents.
- Active travel was much more common within the Park than in travel to the Park; one quarter mentioned they travelled by walking.
- Compared to 2015/16, more respondents reported travelling around the area by car (61% in 2015/16, compared to 73% in 2019/20) and fewer walked (44% in 2015/16 to 25% in 2019/20). Fewer also reported using a ferry, loch cruise or waterbus in 2019/20 (2%, compared to 10% in 2015/16). However, **it is likely that these differences have been influenced by the sampling points used for each study**, e.g. fewer interviews were conducted along the eastern shore of Loch Lomond and in Balloch in 2019/20, where there are more likely to be people walking the West Highland Way and taking waterbuses.

## Transport within the Loch Lomond and Trossachs area



Some differences between 2015/16 and 2019/20 data are likely to be due to differences in sampling approach, i.e. sampling points were more spread out across the park in 2019/20.

# Trip profile

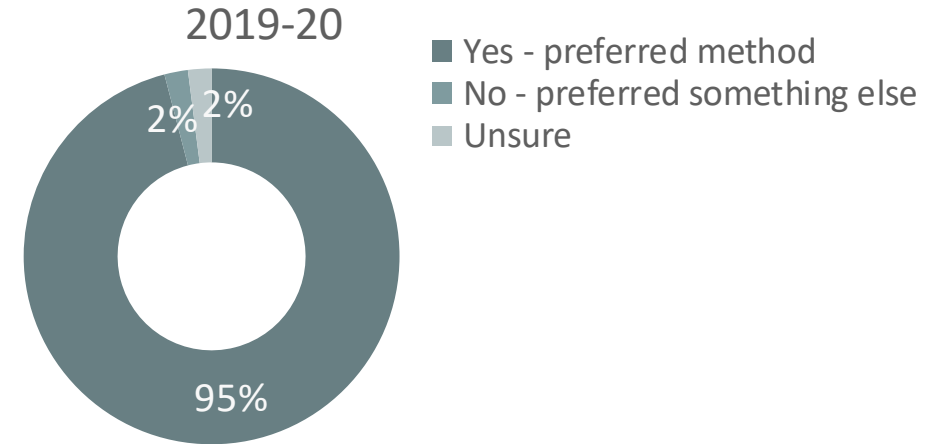
## Transport

- Only 2% of respondents reported that they would have preferred to travel around the Loch Lomond and the Trossachs area by a different mode of transport.
- The highest proportions of these respondents would prefer to travel by train (40%), car (36%) or walking (32%).

Q20. Is travelling by [response from Q19] your preferred method of transport, or would you prefer to get around in some other way? Q21. What would your preferred method of transport be?

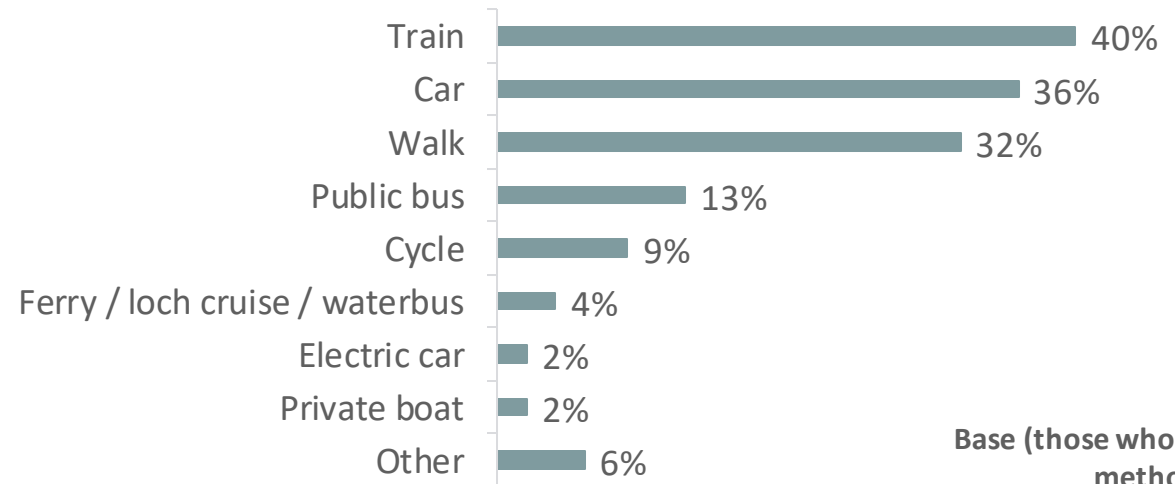


## Did you use your preferred method of transport?



Base (All): 2,265

## What would you have preferred?



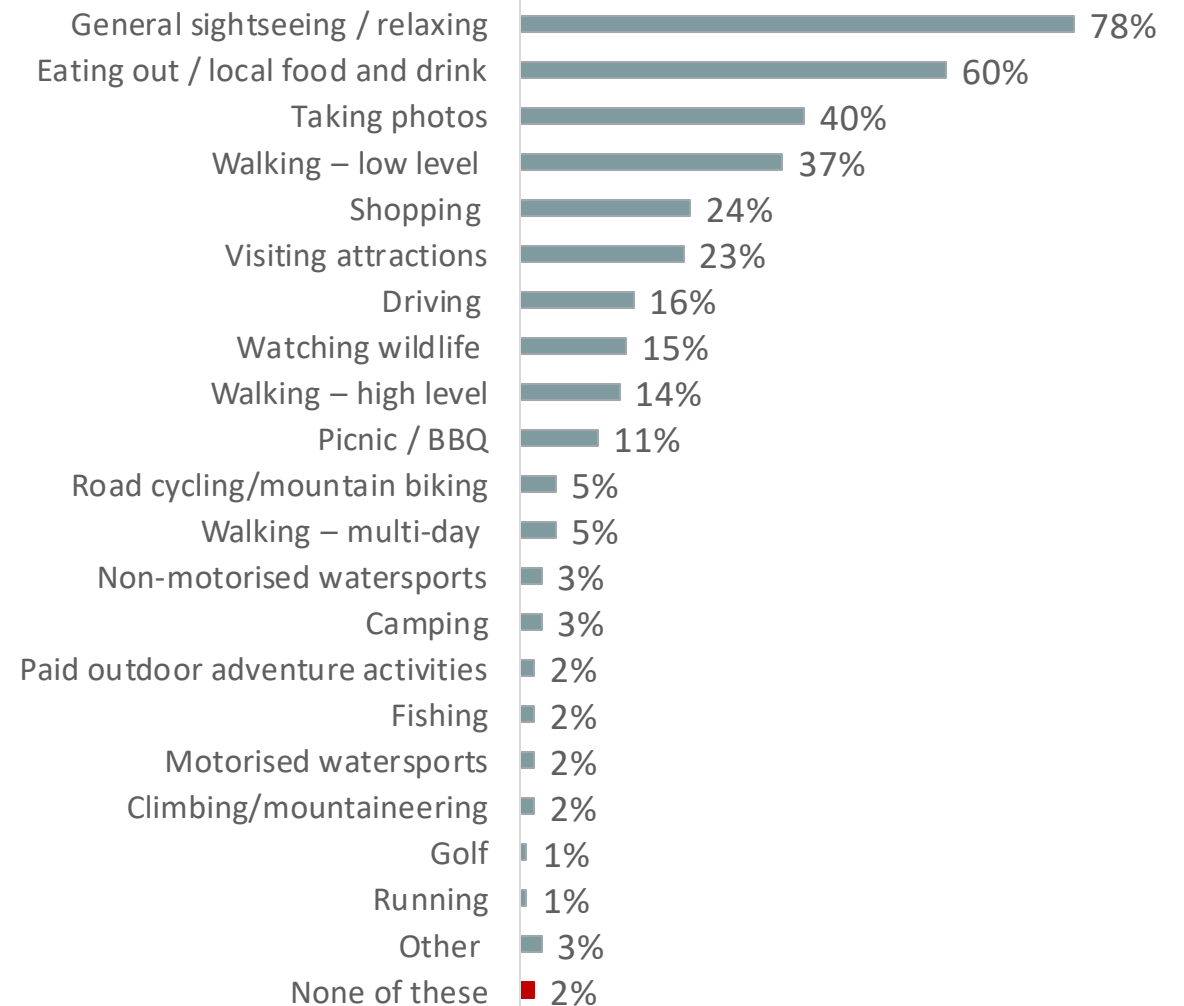
Base (those who preferred another method of transport): 53

# Trip profile

## Activities

- The most popular activities undertaken in the area were general sightseeing (78%) and eating out (60%). Two fifths also mentioned taking photos (40%) and low level walking (37%), while around one quarter did some shopping and/or visited a specific attraction.
- Sporting activities tended to be mentioned by a minority of respondents. These included high level walking (14%), cycling (5%) and water sports (5%).
- Respondents visiting the Loch Lomond and the Trossachs area from the rest of the UK and overseas were more likely than those from Scotland to mention a range of activities, such as sightseeing, walking (high and low level), taking photographs and visiting attractions. Scotland visitors tended to focus on sightseeing/relaxing (72%), eating out (56%) and low level walking (31%). Visitors from Europe were particularly likely to mention high level walking (28%) and multi-day walking (15%) compared to those from elsewhere.
- Participation in a number of activities was higher in 2019/20 than in 2015/16. For example, fewer respondents in 2015/16 mentioned sightseeing (70%), eating out (45%) and visiting attractions (14%). Participation in some other activities appears to have decreased, such as taking photos (53% in 2015/16), shopping (30%) and low level walking (48%). It is very likely that these differences are influenced by the different sampling and data collection methods in each wave.

## All activities within Loch Lomond and Trossachs area

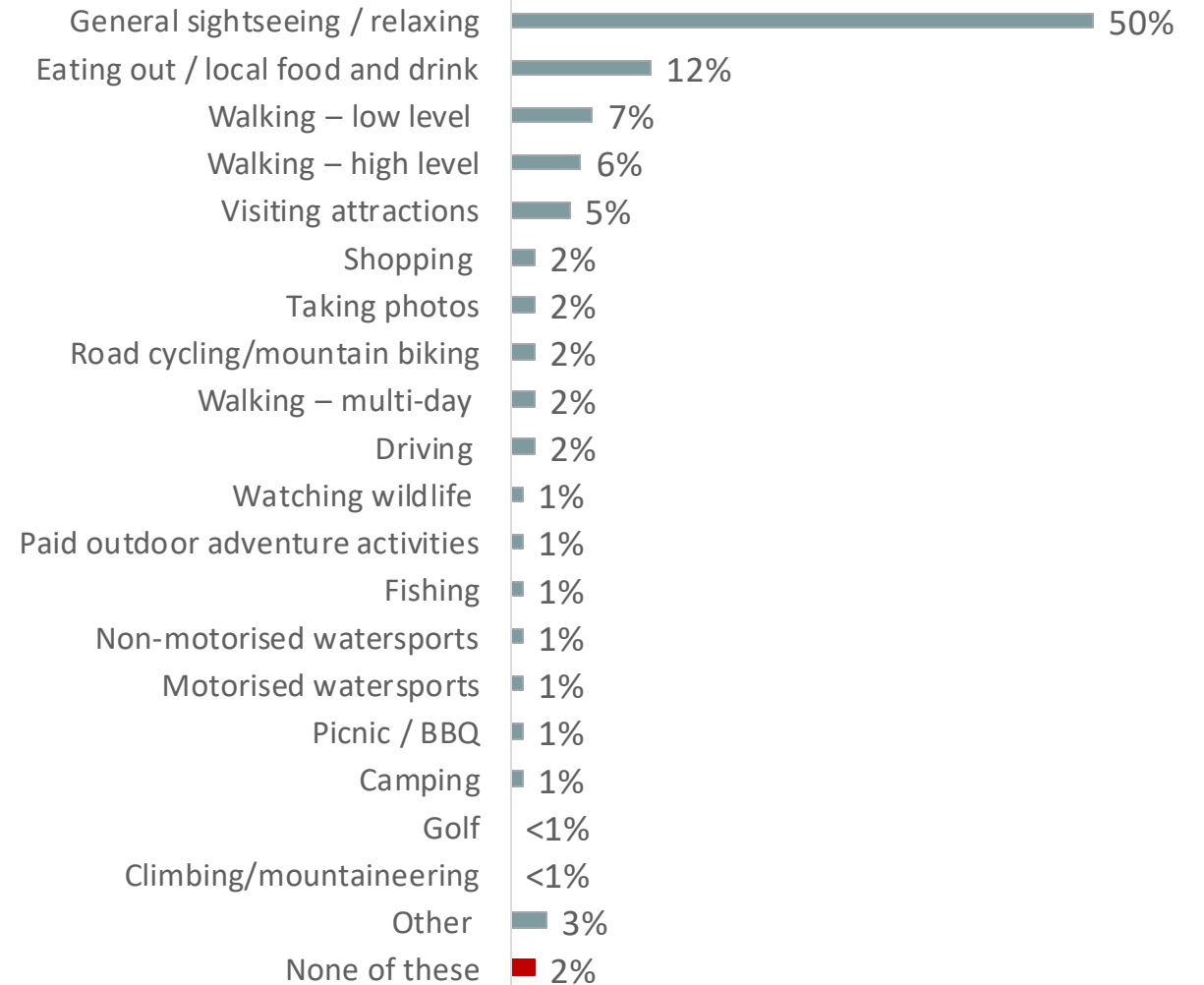


# Trip profile

## Activities

- When asked to state which one activity was the main activity they undertook in the area, half of all respondents reported that it was general sightseeing.
- 16% visited to do some walking – either low level (7%), high level (6%) or multi-day (2%) – while just over one in ten came to the National Park mainly to eat out.
- Those who were participating in a multi-day walk were asked which route they were following. Most of these 53 respondents were walking the West Highland Way (87%). Only one or two respondents were walking either the Rob Roy Way, The Loch Lomond and Cowal Way or the Three Lochs Way.

## Main activity within Loch Lomond and the Trossachs area



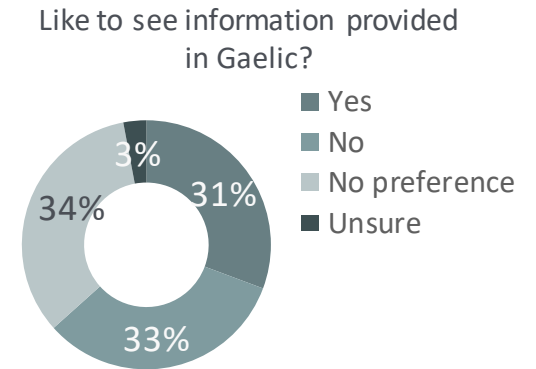
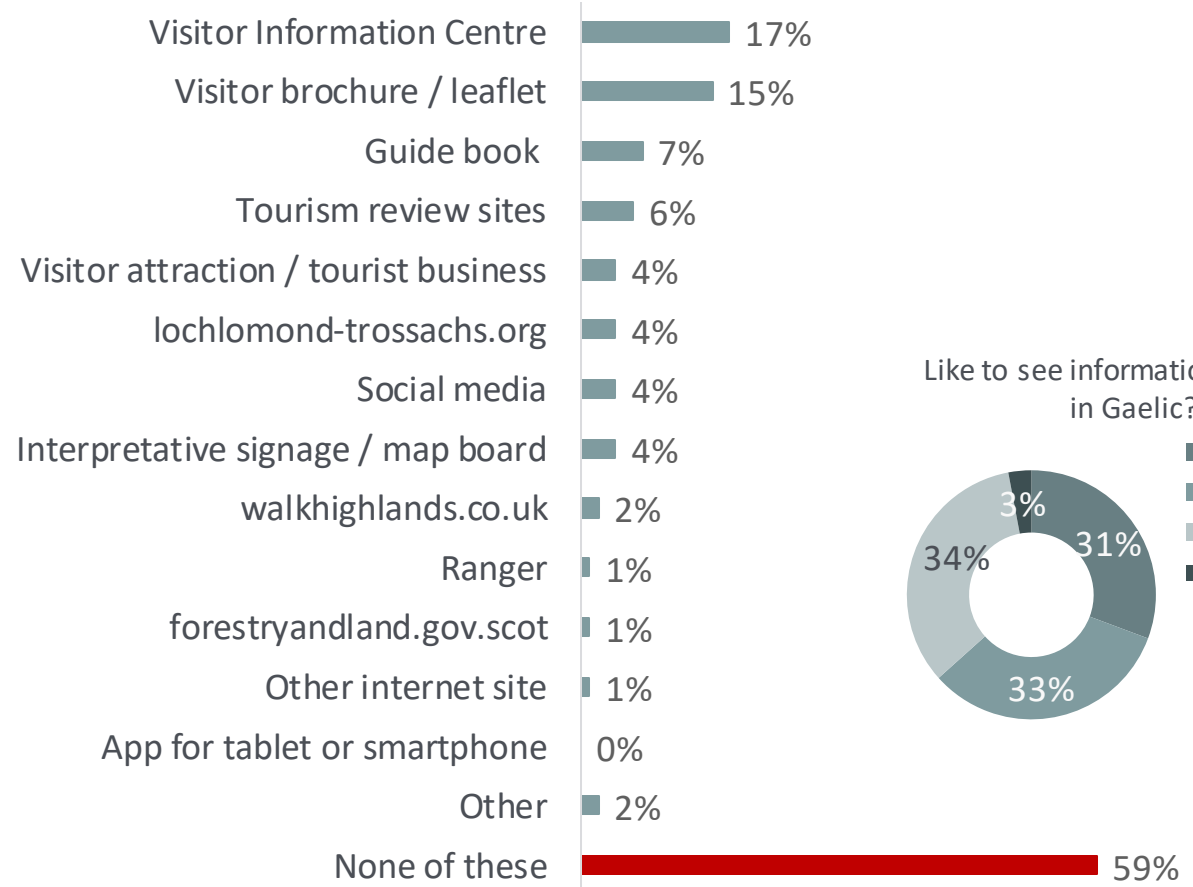


# Trip profile

## Information

- In total, 41% reported that they had used information sources during their visit. Visitors from overseas were the most likely to look for information during their trip (78% did), followed by those from the rest of the UK (60%), while Scotland visitors were the least likely to do this (23%).
- The most frequently mentioned individual sources were visitor information centres (17%) and brochures/leaflets (15%). Usage of these resources was higher for visitors from overseas (38% used visitor information centres and 33% used brochures/leaflets).
- In total, 15% mentioned online sources, such as review websites (6%), lochlomond-trossachs.org (4%), social media (4%) and walkhighlands.co.uk (2%). Visitors from Europe were particularly likely to mention online sources (36%), including review websites (14%), lochlomond-trossachs.org (12%) and walkhighlands.co.uk (7%).
- Respondents were also asked if they would prefer information about the National Park to be available in Gaelic as well as English. Opinion was split on this; approximately one third would like Gaelic to be available; one third did not feel there is a need for it and one third had no preference.
- This is an increase in the proportion of those in favour of information provision in Gaelic compared to 2015/16 when 16% stated yes; however, a far higher proportion (57%) stated no preference in the previous wave.

## Sources of information during visit



Q22. Have you accessed visitor information from any of the following sources **during** your visit to the National Park? Q23: In terms of the numerous information sources available about the National Park, **would you** prefer Gaelic to be included as well as English?

2015/16 data on sources of information is not shown as this was likely to have been heavily influenced by method of distribution of snap cards, i.e. high proportions mentioned rangers and VICs where many cards were distributed.

Base (All): 2019/20 2,265





# Evaluation of visit to Loch Lomond and The Trossachs National Park

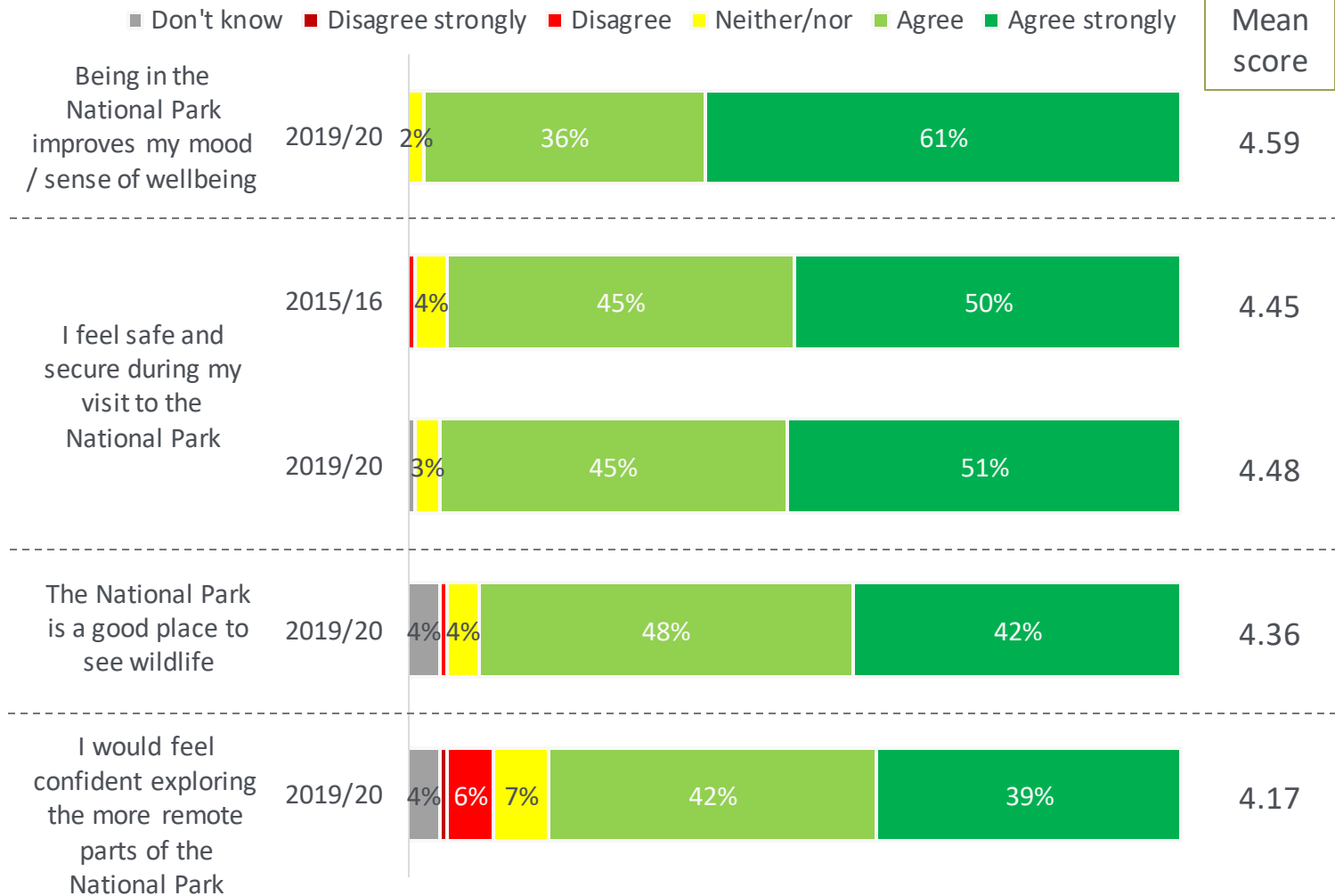
# Evaluation

## Perceptions of the Park

- Respondents were read four statements about Loch Lomond and The Trossachs National Park and asked to state how much they agreed or disagreed with each. Only one of these statements was also included in the 2015/16 survey.
- Attitudes towards the National Park were overwhelmingly positive: the majority of visitors agreed with all of the statements.
- In particular, strong agreement was highest for the sentiment that being the Park improves one's mood and sense of wellbeing – 97% agreed overall and 61% agreed strongly.
- Similarly, the majority agreed that they feel safe in the Park (96%), it is a good place to see wildlife (90%) and that they would feel confident exploring the more remote parts of the Park (81%).
- Agreement that visitors feel safe and secure in the Park was consistent between 2015/16 and 2019/20.



## Perceptions of Loch Lomond and The Trossachs National Park



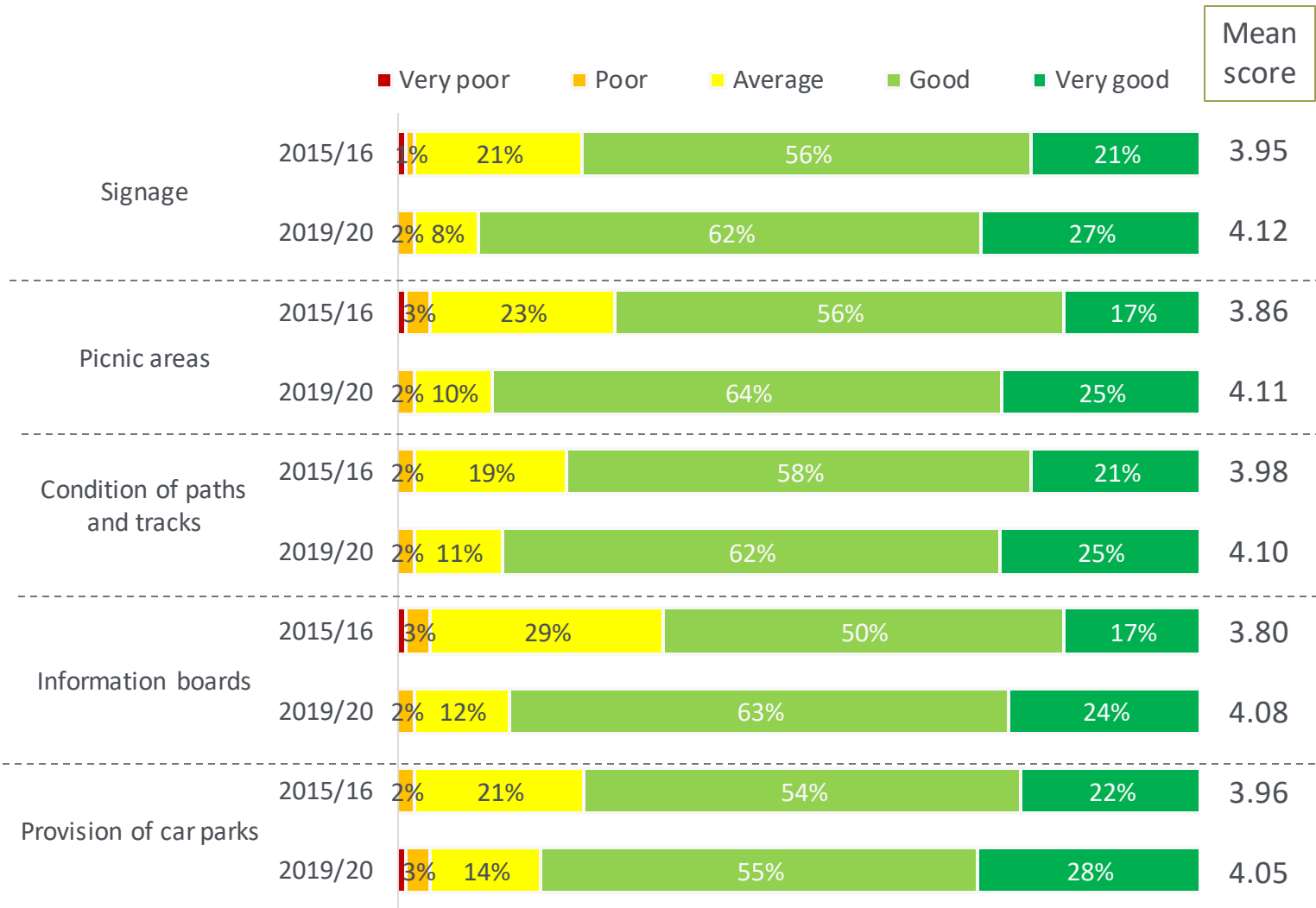
Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.

Q27. I would like to read out a number of statements which other visitors have made about the area. Please tell me how much you agree or disagree with each of these statements.

# Evaluation Facilities

- Respondents were asked to rate a number of facilities and amenities in Loch Lomond and The Trossachs National Park. The data shown here excludes those who did not use the facilities, i.e. those who responded 'not used/not applicable'.
- The data show that the majority rated signage, picnic areas, the condition of paths and tracks, information boards and car parks as good or very good, with very little differences in the ratings of these five amenities.
- There have been improvements in the scores for these facilities since 2015/16, with higher proportions rating them as 'very good' in 2019/20. In particular, there have been good improvements in ratings for signage, picnic areas, and information boards. There may, however, be some scope for further improvement by increasing the percentage 'very good' still further in future years.

## Ratings of facilities in Loch Lomond and The Trossachs National Park



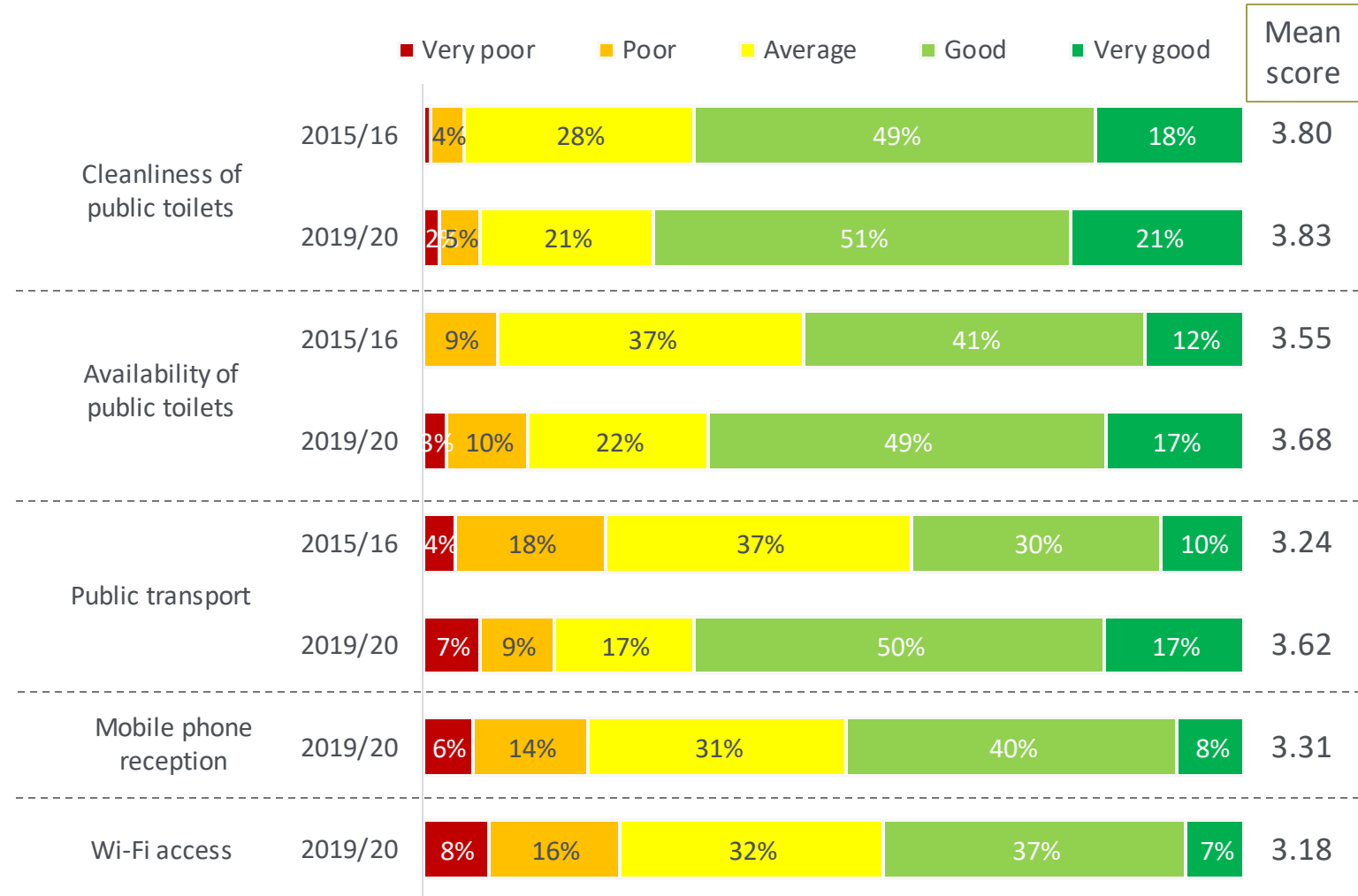
Mean score calculated, whereby 1 is very poor and 5 is very good.

Base (all excluding 'not applicable'): 2015/16 345 – 688; 2019/20 1,581 – 2,219

# Evaluation Facilities

- The cleanliness and availability of public toilets were considered satisfactory by the majority – 71% rated cleanliness as good or very good and 66% provided a similar rating for the availability. However, only a minority rated public toilets as very good and 13% considered availability to be poor.
- Two thirds of respondents also provided a positive rating for public transport; however, again only 17% described it as ‘very good’ and 16% considered it to be poor.
- Digital access received the lowest ratings, although most considered mobile phone reception and Wi-Fi access to be at least average. One fifth of respondents described mobile phone reception as poor, while 24% gave a negative rating for Wi-Fi access.
- Again, there have been some significant improvements in the ratings of facilities compared to 2015/16. In particular, only 40% rated public transport as good/very good in 2015/16 compared to 67% in 2019/20.
- There has also been an increase in satisfaction with the availability public toilets, from 53% good/very good in 2015/16 to 66% in 2019/20.
- Satisfaction for digital access was asked for mobile phone reception and Wi-Fi access in one single rating in 2015/16. However, there has clearly been an improvement for this too – only 26% rated it as good/very good and 38% provided a negative rating in 2015/16.

## Ratings of facilities in Loch Lomond and The Trossachs National Park



Mean score calculated, whereby 1 is very poor and 5 is very good.

Base (all excluding ‘not applicable’): 2015/16 345 – 653; 2019/20 591 – 1,984

# Evaluation

## Customer service

- Almost all respondents rated the customer service they received from staff in various settings as good or very good.
- The highest rating was for staff at accommodation – 53% considered the service they received to be very good.
- Customer service in pubs, restaurants and cafes, and visitor attractions was also highly praised, with 92% of respondents rating it positively and more than two fifths giving a ‘very good’ rating.
- This question was not asked in 2015/16.

## Ratings of customer service in Loch Lomond and The Trossachs National Park



Mean score calculated, whereby 1 is very poor and 5 is very good.

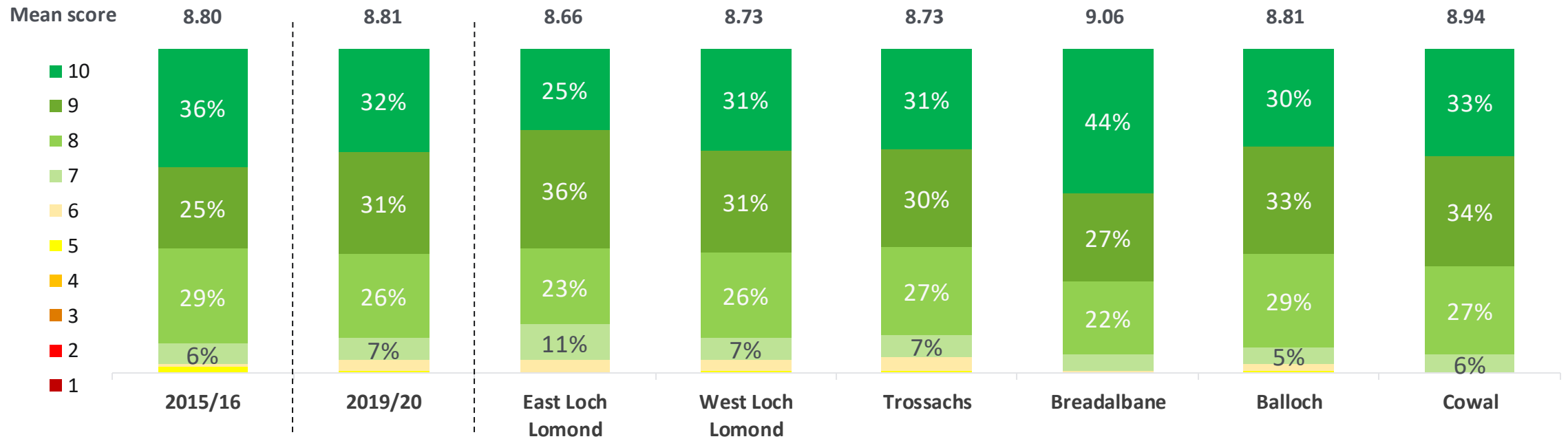
Base (all excluding ‘not applicable’): 2019/20 794 – 2,071

Q30. And please tell me how you would rate the customer service provided by staff at facilities you have used in the area this trip?

# Evaluation of visit



## Overall experience in Loch Lomond and The Trossachs – by area



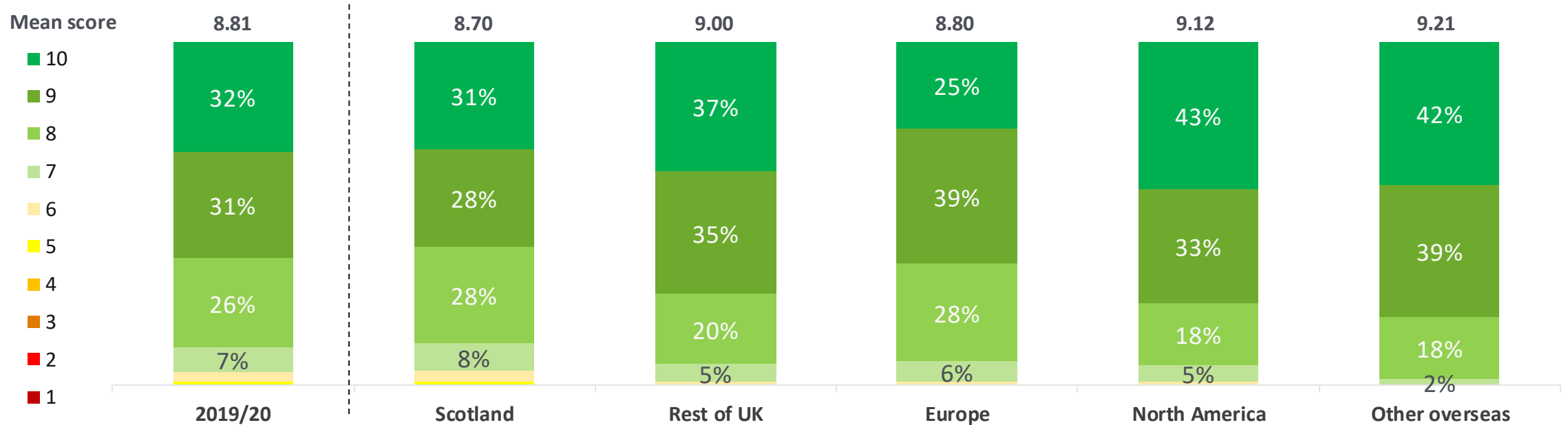
- When asked to provide a mark out of 10 for their overall experience in the Loch Lomond and Trossachs area, 64% of respondents scored it with 9 or 10 and the average score was 8.81.
- This score is very similar to 2015/16 when 61% gave a rating of 9 or 10 and the average score was 8.80.

- Scoring of the overall experience was consistently high across all areas of the Park; however, respondents interviewed in Breadalbane (mean score 9.06) were particularly positive.

# Evaluation of visit



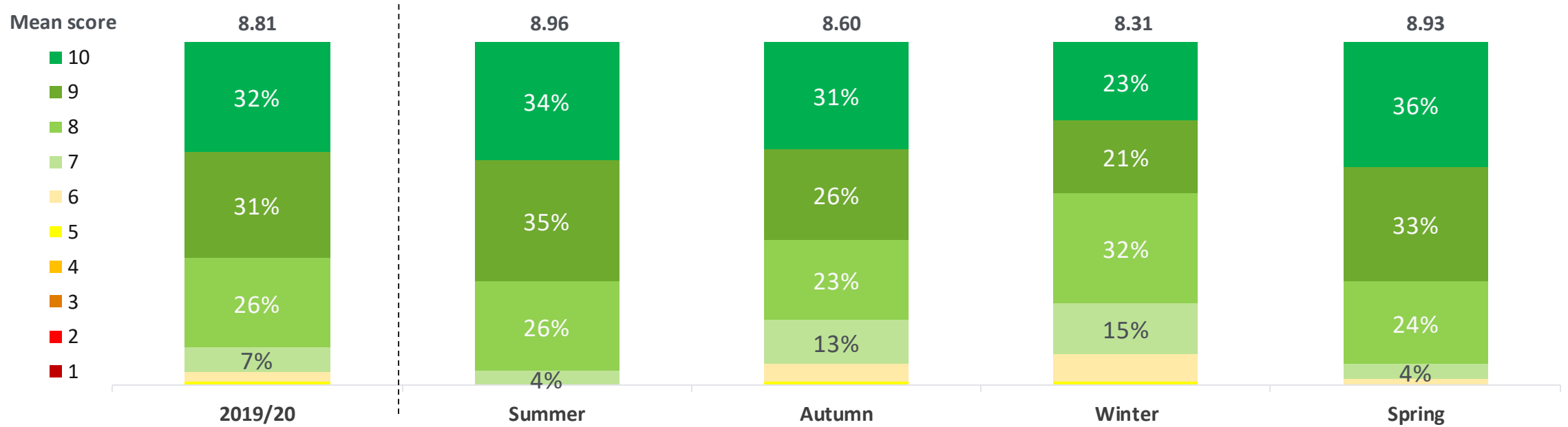
## Overall experience in Loch Lomond and The Trossachs – by origin



- Visitors from all countries provided very high satisfaction scores. North American visitors and those from other overseas regions were the most positive about their experience of the Loch Lomond and the Trossachs area – over two fifths gave a perfect 10 out of 10 score and the average was 9.12 and 9.21 respectively.
- Visitors from Europe were also overwhelmingly positive but tended to be less likely to give a score of 10 out of 10 compared to visitors from the UK, North America and other overseas regions.
- Visitors from the UK were also very positive, with around one third scoring their overall experience with 10 out of 10, and an overall average of 8.72 for Scotland visitors and 9.00 for rest of UK visitors.

# Evaluation of visit

## Overall experience in Loch Lomond and The Trossachs – by season



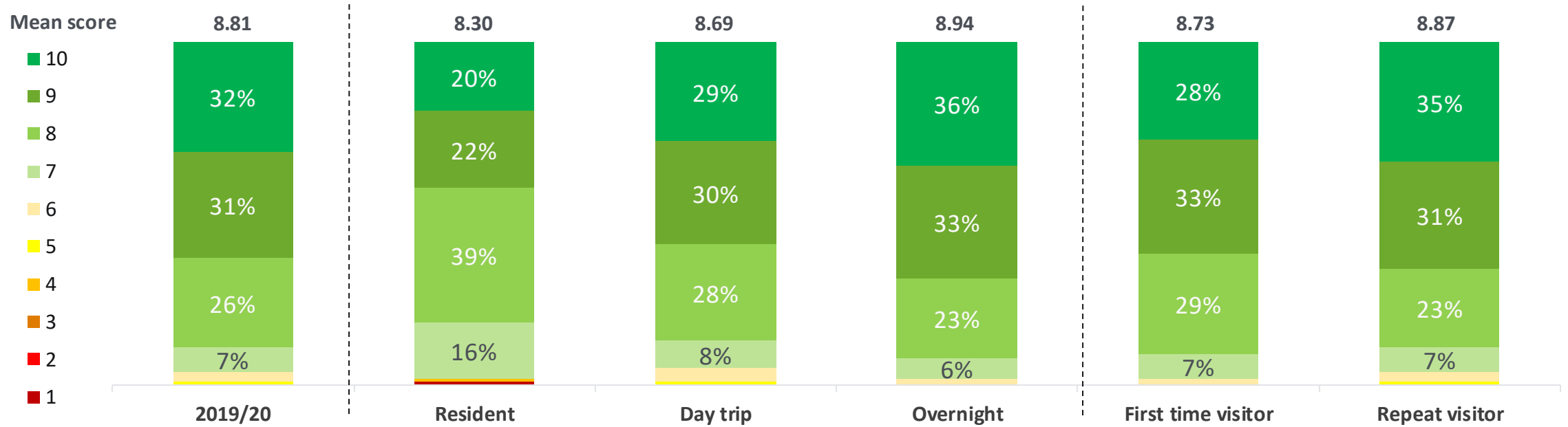
- Satisfaction ratings were generally consistently high throughout the year, although winter visitors were less likely to give a 10 out of 10 score. This may be due to weather conditions in the winter months, or perhaps less availability of local facilities for visitors, such as cafes, attractions and visitor centres.



# Evaluation of visit



## Overall experience in Loch Lomond and The Trossachs – by type

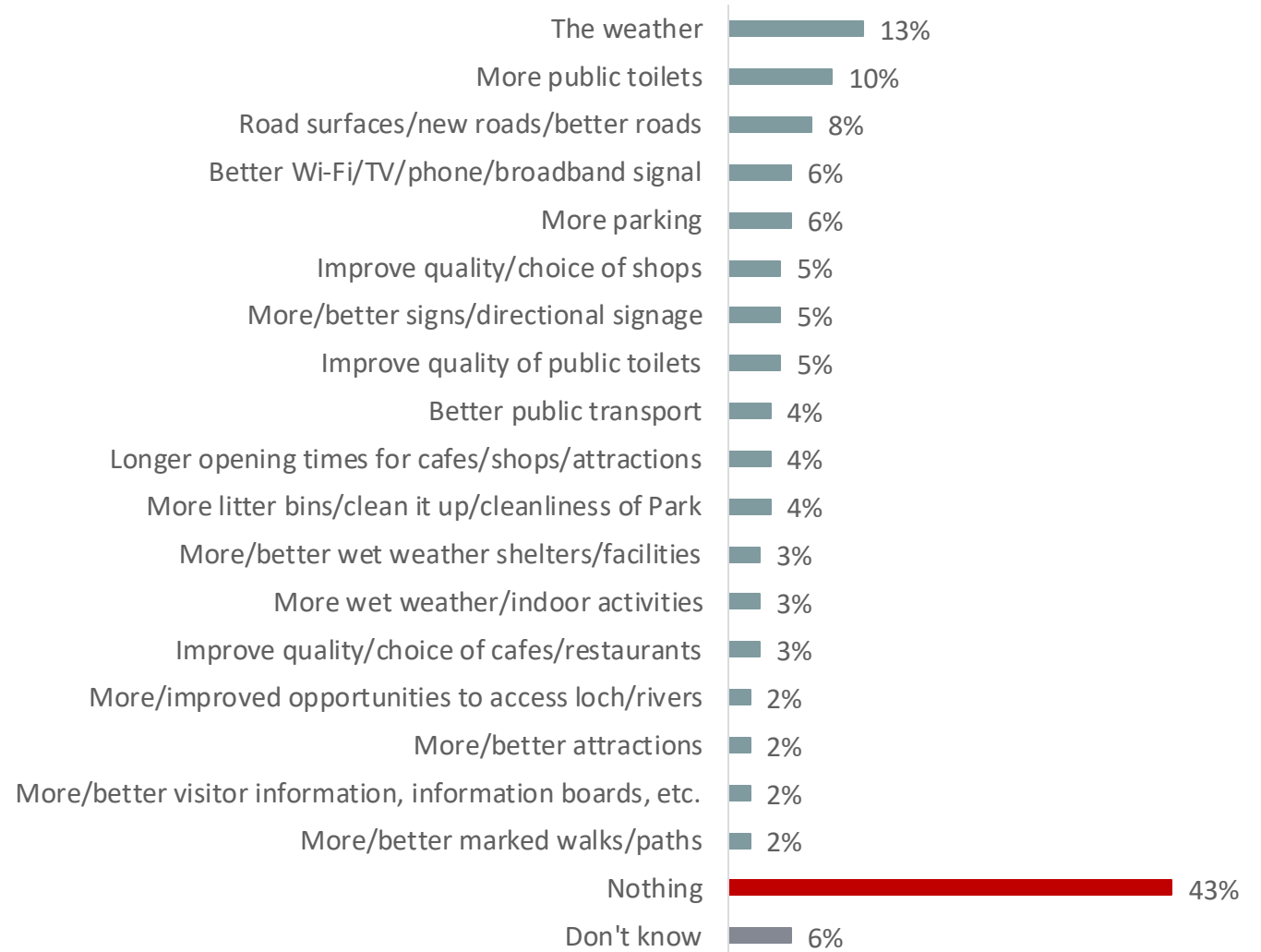


- Visitors to the Park were more likely to provide high scores than residents, particularly those who were staying overnight. Indeed, over a third of overnight visitors (36%) provided a 10 out of 10 score for their overall experience.
- Repeat visitors tended to be slightly more positive than first time visitors – 35% gave a score of 10 compared to 28% of first timers.

# Evaluation Improvements

- When asked if there was anything that could have been improved to make their visit to Loch Lomond and the Trossachs more enjoyable, 51% of respondents made a suggestion.
- No particular suggestion stood out, instead a number of different ideas were provided, the most prevalent response being to improve the weather (13%). A small number also mentioned more wet weather/indoor activities (3%) and more wet weather shelters/facilities (3%).
- One in ten said that they would like to see more public toilets. A small minority (5%) also felt the quality of public toilets could be improved.
- Almost one in ten respondents suggested that better roads would have improved their visit, while 6% were looking for better digital access.

## Suggested improvements to make visit more enjoyable



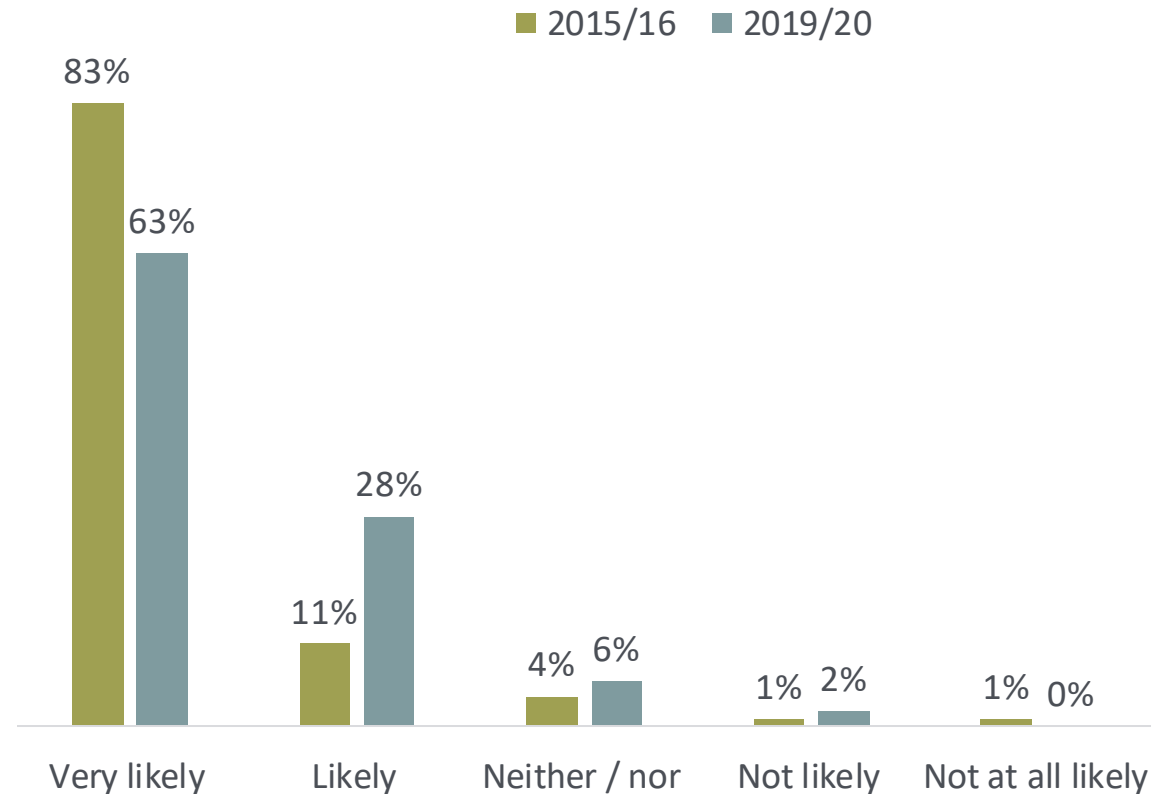
Only improvements with more than 1% are shown.

# Evaluation

## Return visits

- Visitors to the Park were asked to state how likely it is that they will visit the area again in the future. The majority reported that this was either very likely (63%) or likely (28%).
- Those who felt a return would be unlikely were asked why. Most of these respondents stated that they lived too far away or abroad (65% of the 51 respondents who were unlikely to return). A quarter said simply that they felt that one visit was enough.
- The proportion stating 'very likely' was lower in 2019/20 than in 2015/16. This is likely to be due to the higher proportion of overseas visitors in 2019/20.

## Likelihood to visit again



Base (Visitors only): 2015/16 709; 2019/20 2,156



# Final summary and conclusions

# Summary and conclusions

## Overview



- The primary objective of the 2019/20 Loch Lomond and The Trossachs National Park visitor survey was to provide robust data to facilitate understanding of visitors to the Park:
  - Who is visiting the Park?
  - Why did they choose to come to Loch Lomond and The Trossachs?
  - What type of trip did they have and what did they do during their visit?
  - How satisfied were they with their visitor experience?
- A total sample of 2,196 visitors and 69 residents (who were on a leisure trip) were interviewed over 11 months from May 2019 to March 2020. Interviewing was conducted at 23 sampling points across the Loch Lomond and The Trossachs National Park.
- Data gathered during the survey was compared to the survey conducted in 2015/16.
- It is important to note that since the 2019/20 survey was conducted the worldwide coronavirus pandemic has had a huge impact on the tourism sector both here in the UK and globally. It is currently very difficult to predict what the longer term consequences of this crisis will be for tourism in the National Park; however, the conclusions noted here refer to both short term opportunities for the domestic market and longer term ambitions looking ahead to when international tourism can return.

# Summary and conclusions

## Visitor profile



- The demographic profile of visitors in 2019/20 was broadly consistent with 2015/16:
  - There were slightly more females (54%) than males (46%) interviewed.
  - There was an approximately even spread across the age groups with around one fifth of respondents falling into each age band; however, only a small proportion were within the youngest age group of 18 to 24. Compared to 2015/16, the age profile of visitors in 2019/20 was slightly older.
  - Visitors tended to be classified within the more affluent AB and C1 socio-economic groups (61%), rather than the C2 and DE groups (34%).
- Over three quarters of visitors (79%) were from within the UK, with 60% from Scotland and 19% from other parts of the UK.
- Europe was the next most prevalent market, accounting for 13% of visitors, including many from Germany and France.
- North Americans accounted for 5% of all visitors, while 3% came from other parts of the world, most commonly Australia.
- The proportion of overseas visitors was higher in 2019/20 (21%) than in 2015/16 (11%).
- One third of visitors were visiting Loch Lomond and The Trossachs National Park for the first time in 2019/20. Amongst visitors from Scotland, only 12% were visiting the National Park for the first time.

# Summary and conclusions

## Motivations to visit the Loch Lomond and The Trossachs area



- The primary motivations for visiting Loch Lomond and the Trossachs were to enjoy the beautiful scenery and to experience peace and relaxation. Secondary motivations were wishing to return having enjoyed previous visits, sightseeing and walking.
- The largest proportion of visitors who came to the Park because of the scenery specified lochs and mountains as the most motivating aspects of the landscape they had come to enjoy. More active pursuits, such as sports, sailing, etc. were mentioned by only a minority of respondents.
- When asked where they sought information or inspiration for their visit to LLTNP almost half of respondents reported that they simply relied on their own knowledge, often from a previous visit. This was particularly true of visitors from Scotland. For those who did seek out information, the main source was the internet (32% mentioned the internet in total). A significant proportion (14%) also reported that they sought advice and recommendations from friends or relatives before their visit.
- Visitors from overseas and other parts of the UK were particularly likely to use a range of information sources before visiting the Park compared to visitors from Scotland.

# Summary and conclusions

## Trip profile



- In total, 45% of respondents were on a day trip to the area, while 51% were on a holiday or short break including at least one overnight stay and 3% were residents. Two fifths of all visitors were staying overnight in the Park area – most often for a break of 1 to 3 nights.
- Two thirds of respondents were visiting as a couple – 64% reported there were two people in their group and 66% reported visiting with their spouse/partner. One in ten were visiting alone and 27% were visiting with 3 or more people in their group. One in eight visitors (13%) had children in their party.
- Over one third of overnight visitors (36%) stayed in a hotel, while the remainder were approximately evenly split between self-catering accommodation (22%), camping/caravanning (21%) and B&Bs (20%). There has been a decrease in the proportion choosing camping/caravanning compared to 2015/16 and an increase in those staying in B&Bs.
- Car was the most frequently mentioned transport option – four fifths of visitors travelled to Loch Lomond and the Trossachs by car.
- The activities undertaken by visitors during their visit mirrored their reasons for visiting – general sightseeing, eating out, taking photos and walking were the most often mentioned. Two fifths looked for information during their trip, most often in visitor information centres, or by referring to leaflets/brochures and online sources.



# Summary and conclusions

## Evaluation of visit



- The majority of visitors rated various aspects of their trip to Loch Lomond and The Trossachs National Park very highly.
- The highest level of agreement was with the statement that being in the Park improves visitors' mood/sense of wellbeing. Most respondents also agreed that they felt safe and secure in the area, it is a good place to see wildlife and they would feel confident to explore the more remote parts of the Park.
- Ratings of many facilities within the Park were also very positive. In particular, signage, picnic areas, paths and tracks, information boards and car parks were highly rated, and perceptions had improved since 2015/16.
- Although satisfaction levels were slightly lower, the majority were also happy with public toilets and public transport, and there have been increases in satisfaction with these since 2015/16.
- Satisfaction ratings were lower for digital connectivity (mobile phone reception and access to Wi-Fi), although most respondents considered these to be average or good, and there have also been improvements in these ratings since 2015/16.
- Ratings of customer service across various providers were consistently very high, with more three quarters rating all good or very good. Satisfaction with service at accommodation providers was particularly strong.
- When asked to rate their overall experience out of 10, the average score across the total sample was 8.81, with 32% giving a perfect score of 10 out of 10. This is similar to 2015/16 when the average score was 8.80 and 36% gave 10 out of 10.

# Summary and conclusions

## Recommendations



- The domestic Scottish market was very strong for the Loch Lomond and Trossachs National Park in 2019/20. This means that the Park should be in a good position to attract staycation and day trip visitors from Scotland in the short term. There is scope to increase the number of overnight visitors from Scotland, therefore this is an area of potential focus. It may also be possible to increase the number of visitors from England and other parts of the UK to help offset the loss of international visitors due to the coronavirus pandemic. Promotion of transport routes to Loch Lomond and the Trossachs, such as flights and rail routes to Glasgow, could help to encourage visitors from other parts of the UK, especially those who do not wish to make a long journey by car. Improvements in public transport connectivity to and within the Park may also encourage visitors who do not wish to travel by car.
- As well as encouraging more visitors from other parts of the UK, improvements to public transport connectivity could help to decrease the currently high proportion of visitors who travel to the Loch Lomond and the Trossachs by car. Sustainability and green tourism are likely to become increasingly important in future years and therefore consideration should be given to ways in which this could be improved within the Park.
- In the longer term, more could be done to further increase visitors from overseas. Overseas visitors tend to be particularly interested in historical and cultural attractions and distilleries; promotion of these within the Park would therefore help to increase these markets.
- Connecting the National Park with more potential sources of inspiration, such as social media, TV, film and travel features may also encourage future visits. For example, guides to film/TV locations, PR to encourage travel features about the Park and links with social media influencers.
- There is also scope to improve ratings of digital connectivity across the Park, for example, accommodation providers and other venues such as restaurants and cafes should be encouraged to ensure good Wi-Fi access.
- Ratings of customer service were particularly positive. Providers should be congratulated on the warm and friendly service they provide visitors and encouraged to keep up the good work.



# Appendices

# Appendix:

## Sampling locations 2015/16 vs 2019/20

Sampling location	2015/16
East Loch Lomond	33%
Balloch	29%
West Loch Lomond	18%
Trossachs and Breadalbane	8%
Cowal	3%
North Loch Lomond	<1%
No reply	10%

- The number of data collection points was increased from six in the 2015/16 survey to 23 location points for this 2019/20 survey. This was to obtain wider information on visitor profile and behaviour right across the National Park.
- The sampling points were selected to reflect different Park areas with a mix of popular, busy destinations balanced, as far as possible, by a few quieter places.
- The balance ensures the sampling targets give sufficient data for robust analysis while also being practical that we gather information in a cost-effective way.

Sampling location	2019/20	2019/20
Balmaha	11%	Lake of Menteith 3%
Loch Lomond Shores	10%	Tarbet 3%
Luss	10%	Arrochar 2%
Callander	8%	Benmore Gardens / Puck's Glen 2%
Tyndrum	8%	Crianlarich 2%
Aberfoyle	7%	Rowardennan 2%
Balloch	7%	St Fillans / Loch Earn 2%
Drymen	5%	Ardlui 1%
Duck Bay	4%	Inveruglas 1%
Killin	4%	Strathyre 1%
Loch Katrine	4%	Loch Lubhair <1%
Balquhidder	3%	

# Technical Appendix

- The data was collected by CAPI interview.
- The target group for this research study was visitors to the National Park (including residents on a leisure trip).
- The target sample size was 2,400, and the final achieved sample size was 2,265. The reason for the shortfall was the need to halt interviewing in March 2020 due to the coronavirus outbreak.
- Fieldwork was undertaken between May 2019 and March 2020.
- Respondents were selected using probability random sampling, where interviewers selected every  $n^{\text{th}}$  person passing their pre-selected sampling point.
- In total, 22 interviewers worked on data collection.
- Each interviewer's work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by email or telephone) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where email/telephone 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.
- The sample size of 2,265 provides a dataset with an approximate margin of error of between  $\pm 0.41\%$  and  $\pm 2.06\%$ , 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.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

# Key contacts

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