



Loch Lomond and The Trossachs National Park Annual Visitor Number Study

March 2025

Visitor Survey Results And Annual Visitor Volume Model Development Report

The Moffat Centre for Travel and Tourism, GCU

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Executive Summary



Estimating visitor numbers to Scotland's National Parks is challenging. Park boundaries are unrestricted and have resident populations, people transiting through the Park to other destinations alongside day and overnight visitors. A robust measure of Visitor Volume is important to Park planning and reporting. This report details the development of a model to determine annual visitor numbers to Loch Lomond and Trossachs National Park. The project was conducted from June 2023 through November 2024. The project comprised three stages: A Visitor Survey, Data Evaluation, and Model Building and Testing.

The Annual Visitor Volume Model determined there were 4.54 million visitors to Loch Lomond and the Trossachs National Park in 2024.

The visitor survey stage took place throughout the Park between June 2023 and May 2024 and gathered information on visitor behaviour and profile. The survey, conducted at regular periods throughout the year established if there was a seasonal variation in the visitors and their profile.

During and following the visitor survey phase there was an evaluation of the survey data to determine the key elements that could be used to develop a model to estimate visitor numbers. Transport to the Park was identified as the principal determinant of visitation. All visitors must use some form of transport to arrive and leave the Park by Car, Public Transport, Commercial Provider or Active Travel. Datasets relating to monitoring travel to the Park were identified alongside additional measures of tourism and visitor performance in Scotland and the Park region as means of validating outputs from the model.

The model was developed by identifying key points of entry to the Park. Traffic Counters covering these points provided the volume of vehicles entering. A probability model determined the likelihood of a vehicle being a visitor, resident, commercial vehicle or transiting through the Park. Applying multipliers from the visitor survey to the traffic data and amending the outputs to take into account seasonality provided an annual measure of visitors to the Park. Further work to compare the outputs to other validating data took place along with back casting of results to compare visitor volume to the Park in the past to other published studies.

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Project Background



Loch Lomond & the Trossachs National Park covers 720 square miles encompassing some of the most visited landscapes in Scotland. The National Park is a living and working landscape, with towns and villages scattered throughout. Several trunk roads traverse the Park, bringing large numbers of commuters through traffic, particularly along the arterial routes of the A82 and A84.

Many visitors to the Park arrive via the multitude of non-trunk roads that are not monitored as closely as the main trunk roads. Often these visitors will spend a day of recreation without patronising businesses or paid services so it can be difficult to include them in an overall count of visitors to the National Park area. Additional

visitor numbers are derived from group coach parties and off-road routes including cyclists and walkers, including walkers participating on the long-distance routes including the West Highland Way and the John Muir Way.

The Park therefore seeks to determine an accurate total visitor number for this significant national asset, separating residents and commuters from those actively choosing to visit the destination for leisure and recreation purposes that take into account the various transport options and the recreational behaviour of visitors.

This report sets out how the figure was arrived at, providing a credible basis of evidencing how

the total number of visitors has been derived so that it may be shared and used regionally, nationally and internationally by government agencies, businesses, funding bodies and other organisations.

The project's research aim was to provide Loch Lomond and the Trossachs National Park Authority (LL&TNP or “the Park”) with a model of accurate visitor numbers for the National Park.

Specific research objectives were:

- To establish a methodology to calculate the visitor numbers to the Park per annum
- To develop a model from which the visitor numbers can be determined
- To identify indicators from which the model

can be populated

- To undertake a visitor profile survey to establish statistical weights for the model

The visitor survey element of the project established a profile and seasonal behaviour of visitors to the Park from which the model framework was developed. The Visitor Survey follows a long-established programme of surveys conducted within the Park on a 4 to 5 year cycle which highlights the value of visitor research in developing our understanding of the value of the Park.

The approach taken to establish a model that estimates visitor numbers to the National Park was based on primary and secondary research. Primary research via visitor survey to establish a visitor profile and annual pattern of visitor behaviour. The visitor profiling was combined with secondary sources of readily available recurring and reliable datasets to build a model to estimate the number of visitors to the Park.

A literature review of past measurement methodologies was undertaken early in the project to determine possible best practices in the area of National Park visitation. The principal research undertaken in this area has been in North America where National Parks are regulated in terms of visitor entry and exit and have defined entry and exit points, all of which can be monitored and measured. With LL&TNP having open access, transit routes through and a resident

population an approach closer to methodologies adopted for measuring national and regional domestic overnight and day visits would be more optimal and form the basis of the proposed project methodology.

The last comparable study measuring visitors to LL&TNP was “Valuing the Park” (2011) (see Notes and Appendix). The methodology used for the 2011 report was based on several ways of estimating visitor numbers, reconciling records and estimates for various activities with the traffic flows around the Park and the seasonal pattern.

Reference was made to the approach in the 2011 study and lessons were taken on best practices and applied as appropriate. This project took a first principles approach based on the evolving data collected from the visitor survey, analysing and interpreting the trends that are developing

and establishing the best model framework to develop. This was further advances on the indicators that were available to populate the model to ensure a robust and sustainable measure moving forward.

It was proposed at the start that a hybrid methodology which incorporates primary data collection to establish a baseline figure is then used with a series of secondary publicly available data sources accessible to the Park to establish an accurate estimate of visitor numbers. In the development of the methodology, it was necessary to recognise that an important element to understand was that data sources will provide indicators that then have to be formulated and modelled to ascertain visitor numbers. As the research was undertaken and the survey results were gathered a clearer picture of the data sources required for the model emerged as

essential for collection.

The project’s Visitor Survey was conducted from June 2023 to May 2024 with approximately 3 to 5 days of interviews per month. The visitor data was gathered using face-to-face interviews with visitors and residents at key points throughout the National Park. All visitors and residents interviewed were on a leisure trip, either a day visit or an overnight stay at the time of the interview.

When the survey element concluded there were 849 interviews conducted providing a robust sample from which to develop the model.

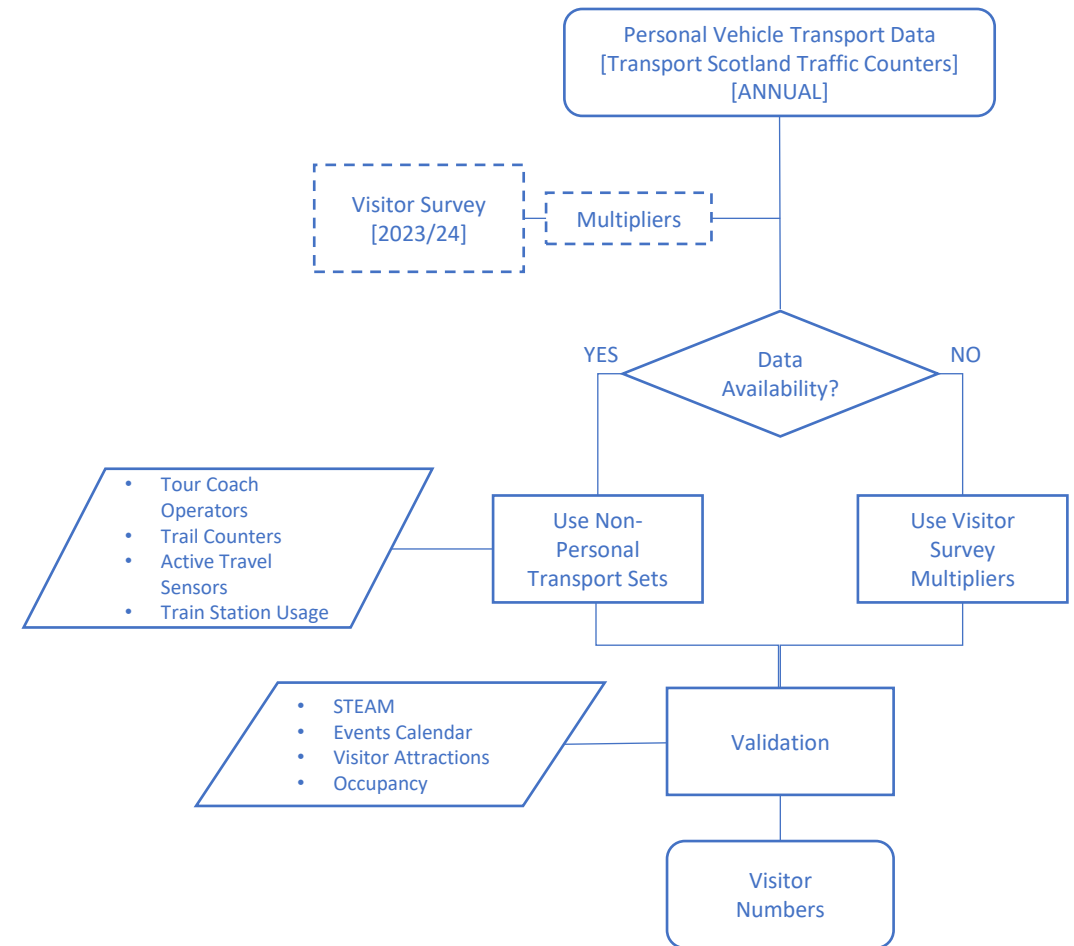
Project Methodology



Analysis of the visitor survey results determined that transport to and from the Park was the principal determinant for identifying visitor numbers. Further detail on this is provided in the Visitor Survey Results. This conclusion is based on the premise that all visitors must use a form of transport either mechanised public or private transport or active travel to enter the Park boundary. This applies to day, overnight and transitory visitors.

Having identified transport as the key metric for measuring visitors we identified that published indicators which met our premise were reliable, robust and regularly generated including Traffic Counters, Trail Counters, Tour Operator Numbers (Coach) and Rail Passenger figures. Having a key metric and a reliable annual data source led to establishing a process for the flow of people into and through the Park Boundaries. Other elements of the visitor survey such as party size, and changes in behaviour due to seasonality provided multipliers to generate an annual visitor estimate. Where data was unavailable we could draw proxies from the visitor survey to supplement the model.

The model for the methodology adopted is shown in the flow diagram. This shows the process of taking the vehicle counts at key points, processing and applying additional data sources and then validating to provide a robust estimate of visitor numbers to the region.



Project Methodology



The annual visitor measurement model calculations were defined using the ratios of transport used, party size, and seasonality applied to the published transport numbers.

The number of visitors that stopped within the Park as a day, overnight visitors or “passing through” were identified from validation data including accommodation occupancy, visitor attractions attendance, and the Scottish Household Survey. A modified Markov Chain analysis (See Notes) was developed to provide a probability framework from which a statistically derived weighting of the ratio between visitors to the Park and those who stopped or passed through. This methodology was further enhanced with lessons from the Valuing the Park (2011) study methodology.

The model was built and defined by examining

the typical behaviours of visitors. From this, we can apply the impacts of non-typical activities such as extreme weather or mass participation events. As the measurement uses “typical behaviour” to define the volume of visitors, monitoring events which may change that behaviour acts as a quality measure. Extreme weather is likely to restrict visitor volume rather than “poor weather” as visitors to the Park are not discouraged from visiting by typical forecast rain, snow or heat compared to events that may be dangerous to activities in the Park such as high winds, flooding and so on. Mass Participation events such as cultural or sporting events will abnormally increase visitors to the Park as a “one-off” occasion compared to regular events such as monthly village farmers markets.

Seasonality is a key element in the calculation of

visitor numbers. Evidence from datasets used to validate the model such as the Visitor Attraction Monitor and the domestic tourism monitors corroborated with anecdotal feedback from tourism sector providers show that seasons have extended over the past few years with tourism activity extending into September / October which was not the case previously. To incorporate this changing behaviour of visitors, calculations on visitor numbers were derived by multipliers based on calendar year quarters. That is to say, multipliers based on average party sizes taken from the visitor survey for January-March, April-May and so on were applied to the variables taken from the traffic counters and other sources.

The final stage of the model development was validation which compares outputs from the model to other sources such as STEAM estimates

and National or Official Statistics including the Office of National Statistics International Passenger Survey, National Tourist Boards Sponsored Great Britain Tourism Survey and Great Britain Day Visitor Survey, collectively known as the tourism monitors.

It is noted that the model will be an informed estimate of the volume of visitors to the Park, which will be replicable over time. The Visitor Survey data collected in June 2023 to May 2024 is comparable with the Park’s visitor survey published in 2020 and therefore will be a valid representation of typical behaviour to be used within the model until any subsequent visitor survey is undertaken or it is determined that there is a significant change in visitor behaviour.

Visitor Survey Results



The Visitor Survey Interviews were conducted from June 2023 to May 2024 with approximately 3 to 5 days of interviews per month subject to weather conditions.

The visitor data was gathered using face-to-face interviews with visitors and residents at key points throughout the National Park who were on a leisure trip at the time of the interview. Interviews were conducted using Computer-Aided Personal Interviewing (CAPI) technology.

A random sampling approach (no quotas set) was used to ensure accurate visitor profiling. Each interview lasted approximately 5 minutes. The sample of 849 was provided from the interviews over the 12 months and has formed the basis for developing the requirements for the data points used for the model.

The survey locations and the sample are shown in the results of Question 1 with Balloch providing the largest number of survey questionnaire responses correlating with the location's high footfall.

The survey sample showed that there was a margin of error of $\pm 3.36\%$, and a Confidence Level of 95%, the required sample size for respondents for a robust survey is 601. With a sample of 849, we have exceeded the requirement for a statistically determined representative sample. Confidence levels inform the margin of error. It is expressed as a percentage representing how often the true percentage of the population would pick an answer which lies within the margin of error.

The questionnaire design was focused on understanding the profile and behaviour of visitors to the Park and utilised several factors that could be relevant to establishing a measure of visitor volume to the Park. Visitor profiling questions included place of residence and purpose of the trip, party size and duration of stay. Additional survey elements looked at transport used, activities undertaken, and accommodation types of an overnight stay. The purpose was to establish markers that could identify

variables which would be available from regularly published datasets.

There is a long-established history of visitor surveys taking place within the Park, which have typically been undertaken every 4 to 5 years. The previous visitor survey undertaken prior to this study was in 2019-2020. The results of the 2019-2020 study were found to be broadly comparable to those in this, the 2023-2024 survey and provided reassurance that the variables identified and used in the model were robust.

Having analysed the results of the visitor survey it was identified that transport used (Question 5) was the key variable for measuring visitor volume to the Park. The conclusion was drawn as all respondents had used some form of transport to arrive, either mechanised or active travel. Car was the dominant form of transport. Transport figures are available annually from Transport Scotland and are produced and published in line with

Official and National Statistics Guidelines. Additionally, figures for Rail, Bus, Coach Tours and active travel are accessible from transport providers (some of which will be private companies) or through sensors such as trail counters on long-distance routes. Transport to the Park is independent of the activity undertaken in the Park. Consideration was given to using occupancy rates, hospitality and visitor attraction attendance to estimate visitor numbers. Using these variables is dependent on expenditure. The Visitor Survey showed (Question 7) that a large number of visitors may be engaged in activities which may not incur any expenditure such as walking, cycling or water sports, but would have used transport. Therefore the approach used in our model is more inclusive than other measures available.

Visitor Survey Results

Question One – Location where the survey is taking place.

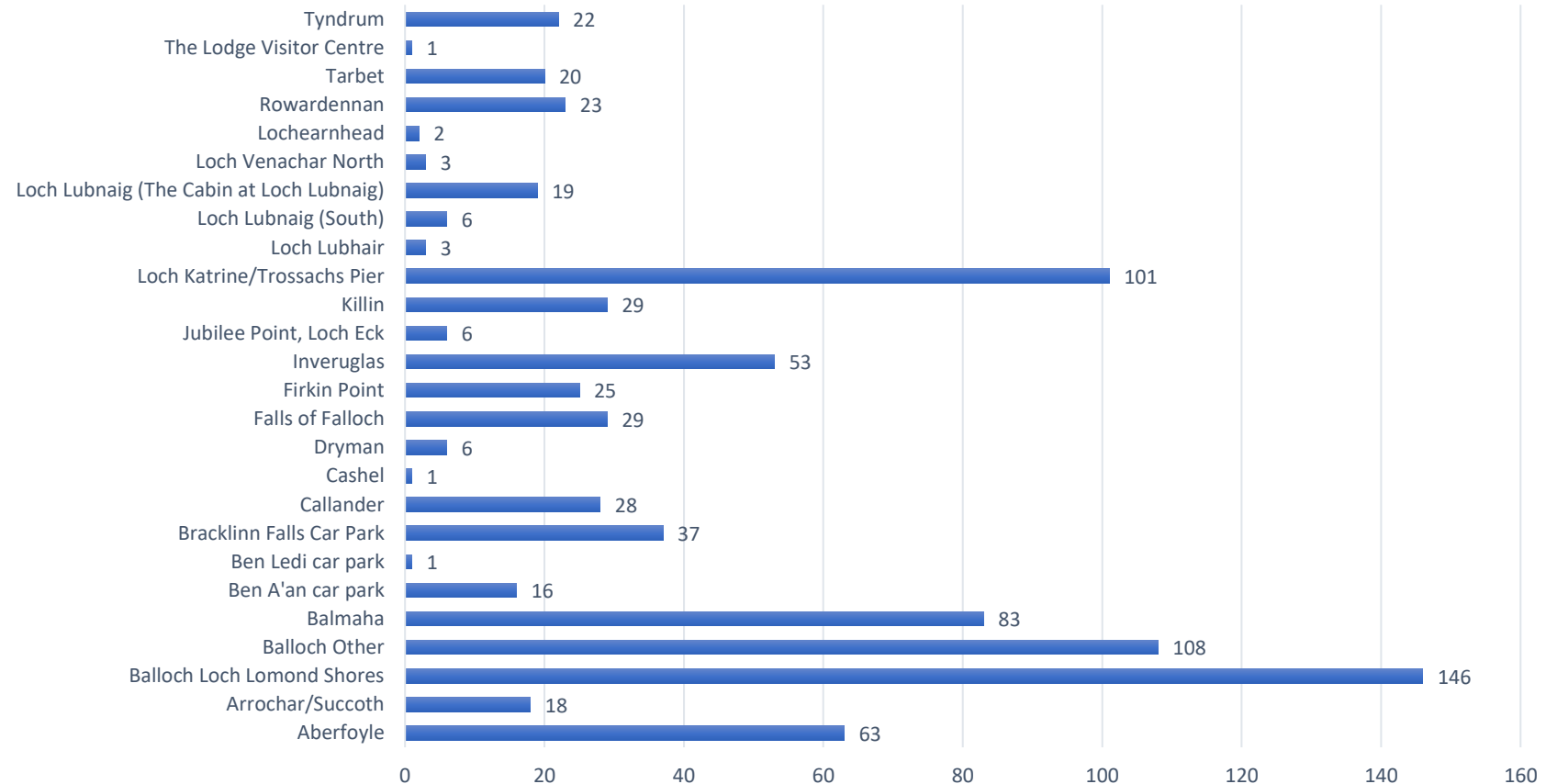


The following section provides an analysis of the Visitor Survey questions and where appropriate their relation to the development of the Visitor Volume Model.

Survey Locations

- The largest volume of respondents were in Balloch – Loch Lomond Shores (17.2%), followed by Balloch – Other (12.7%) and Loch Katrine/Trossachs Pier (11.9%).
- Balloch – Other was the most frequently visited survey location, with it being attended five times. Loch Katrine was the second most visited with it being used four times as a survey location.
- Balloch Loch Lomond Shores had the highest footfall.
- Question one also included asking if the respondent was a permanent resident of the National Park, or a visitor. 788 respondents (92.8%) stated that they were visitors, and 61 respondents (7.2%) stated that they were permanent residents.

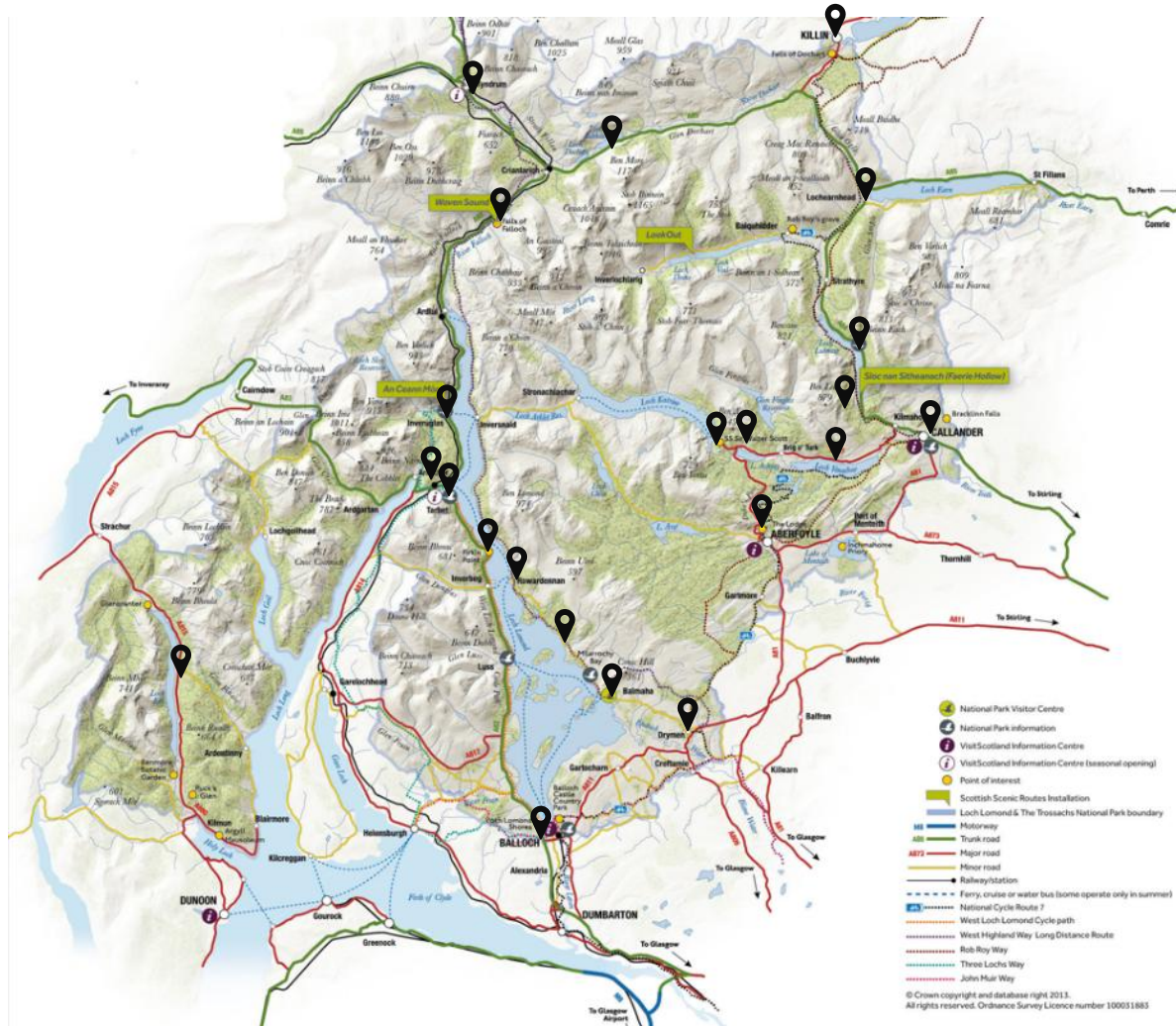
Survey Locations and Volume of Surveys per Area



Base = 849 Survey Responses

Visitor Survey Results

Question One – Survey Locations



Survey Interview Locations

- Aberfoyle
- Arrochar/Succoth
- Balloch Loch Lomond Shores
- Balloch Other
- Balmaha
- Ben A'an car park
- Ben Ledi car park
- Bracklinn Falls Car Park
- Callander
- Cashel
- Dryman
- Falls of Falloch
- Firkin Point
- Inveruglas
- Jubilee Point, Loch Eck
- Killin
- Loch Katrine/Trossachs Pier
- Loch Lubhair
- Loch Lubnaig (South)
- Loch Lubnaig (The Cabin at Loch Lubnaig)
- Loch Venachar North
- Lochearnhead
- Rowardennan
- Tarbet
- The Lodge Visitor Centre
- Tyndrum

Visitor Survey Results

Question One – Location where the survey is taking place.

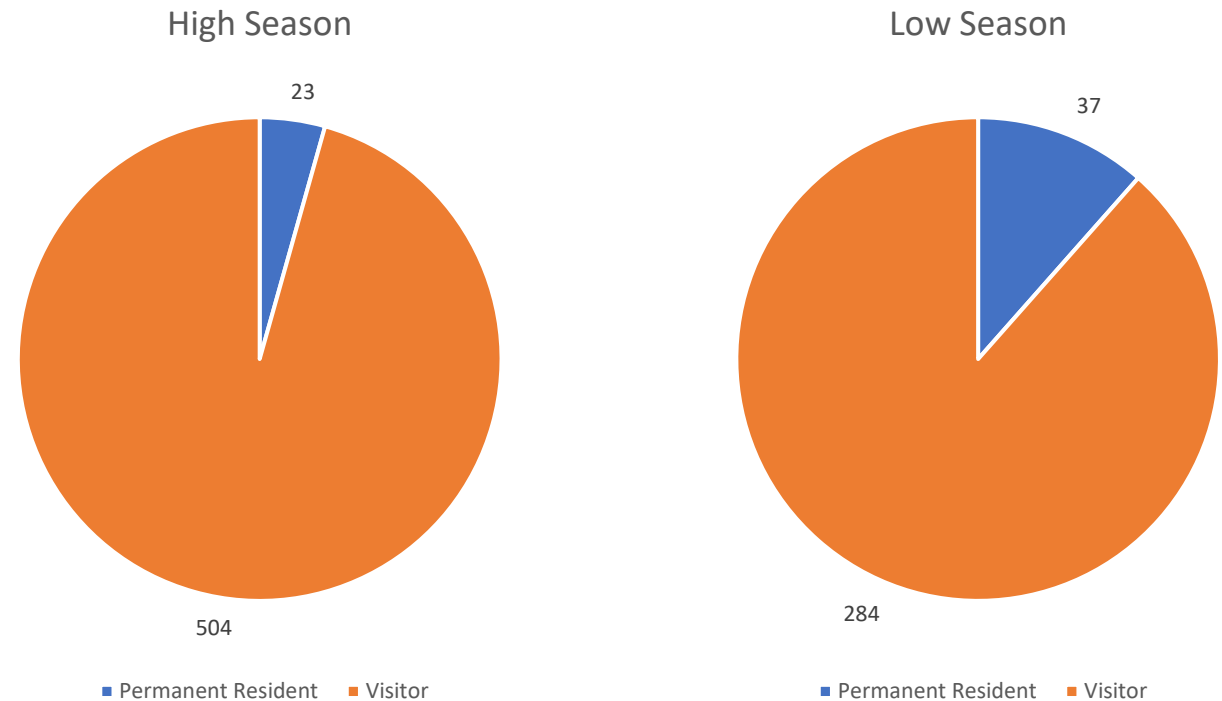
Seasonal Analysis



Survey Volume

- Analysis based on six-month durations to define a low season, a period of January to March and October to December and a high season of April to September were applied to the questionnaires.
- It is recognised through feedback of tourism businesses within the Park that the “high season” is extending gradually from Easter at the start of the calendar year to October. This is based on changing consumer behaviour. This is supported empirically from published tourism monitors of tourism statistics. For the purposes of this study the two 6-month periods are used.
- In the high season, the volume of residents surveyed was 4.4%, which increased to 11.5% in the low season.
- During the high season, the approximate average ratio of permanent residents to visitors is 1:22. This changed in the low season to 1:8, emphasising residents were around the Park during the low season.
- Throughout the high season, the volume of surveys where the weather was classed as “sunny” was 46%, and “raining” was 12%. Compared to the low season, “sunny” was 26% and “raining” was 24%. During the low season, the rain was doubled, while the sun was just shy of being halved.

Volume of Surveys per Area

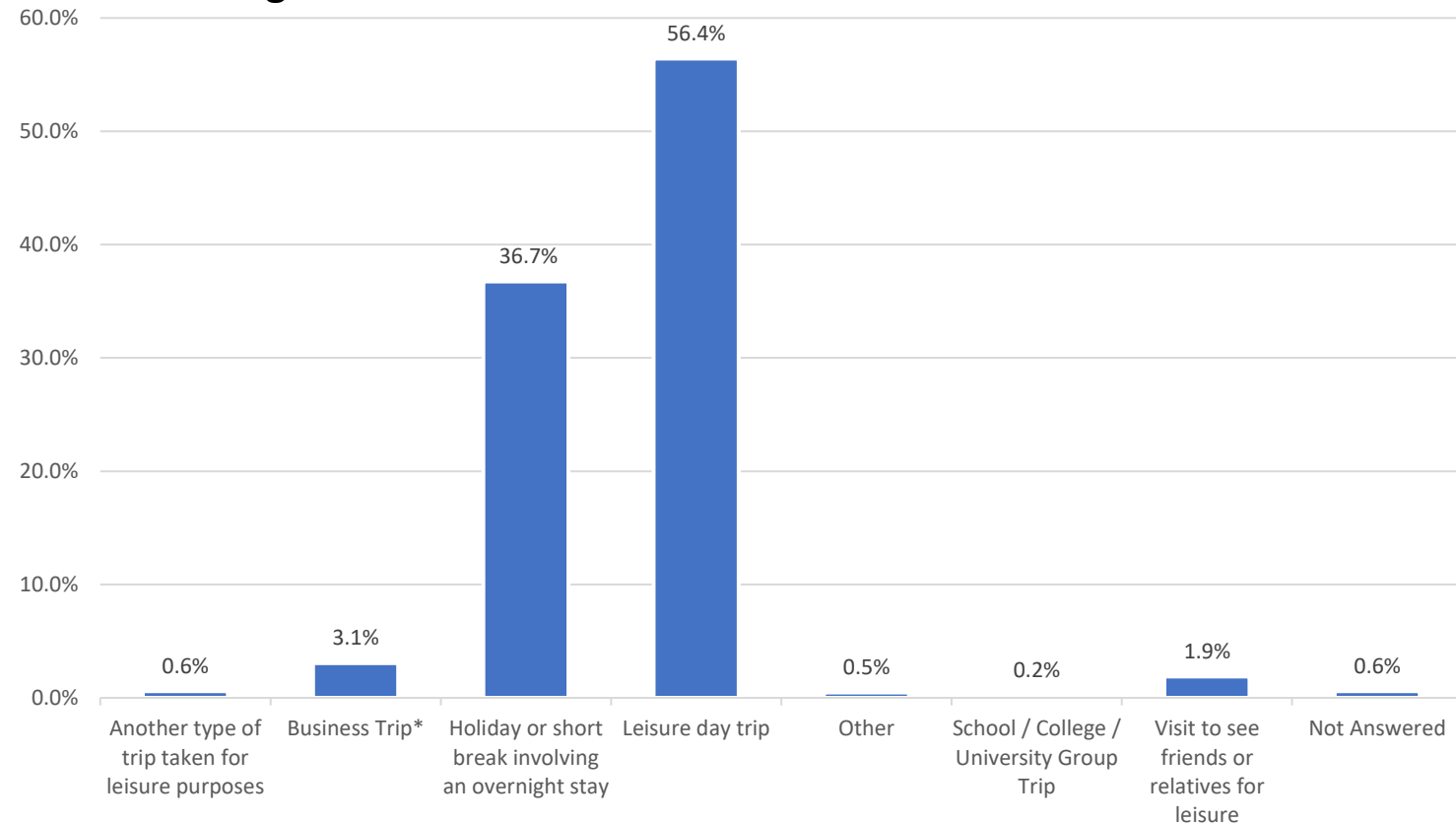


Base = 848 Survey Responses

Reasons for Visiting the National Park

- The main reason for visiting the National Park was a leisure day trip, with 479 of respondents stating that this was the main motive of visiting.
- Holiday or Short break involving an overnight stay was the second largest group by the purpose of trip with 37% of responding
- Business trip was the answer for 26 respondents or 3.1%, which ended the survey for these participants.

Reason for Visiting the Area



Base = 849 Survey Responses

Visitor Survey Results

Question Two – Which of the following best describes the main reason for your trip today?

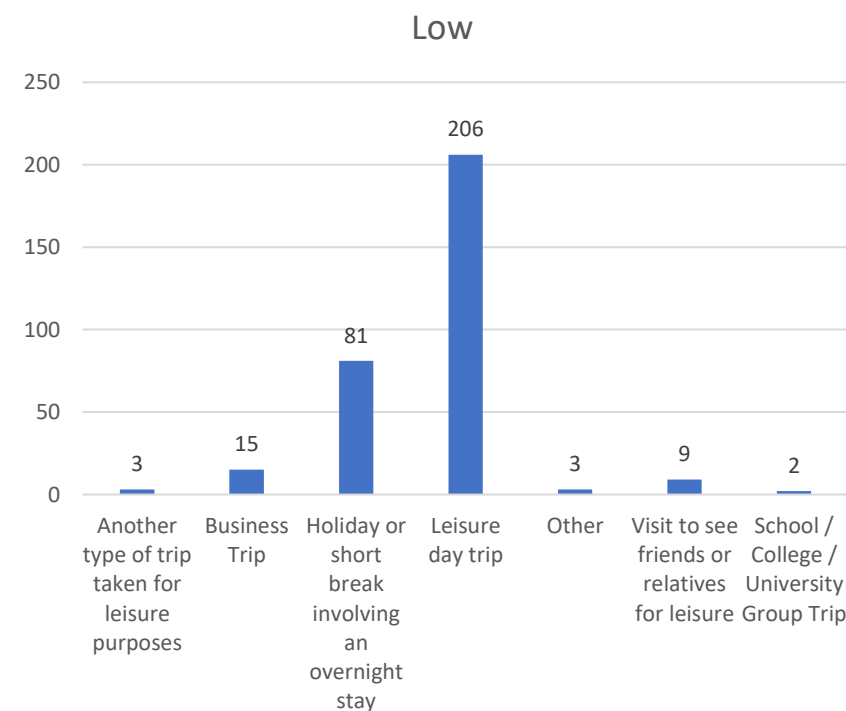
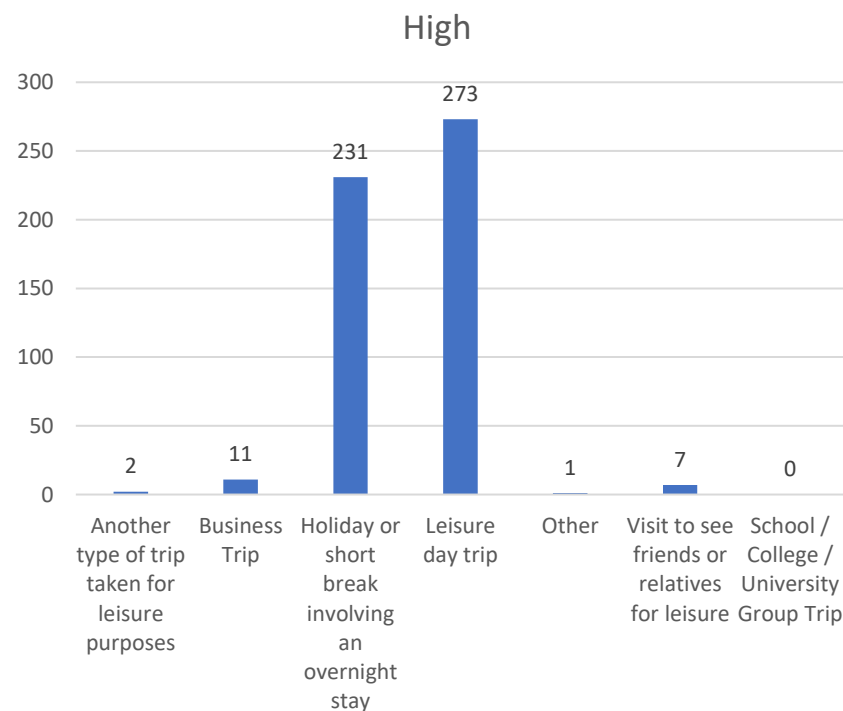
Seasonal Analysis



Reasons for Visiting the National Park

- During the high season, the number of day trips was 52% and holiday/short breaks was 44%. In the low season, the number of day trips was 64% and holiday/short breaks was 25%.
- The disparity between the high and low seasons reflects the seasonality of tourism in Scotland with a higher proportion of overnight visits for both domestic and international visitors during the Summer season. The almost consistent number of leisure day trips for both high and low seasons reflects the large local population, particularly from Greater Glasgow, and also the Central Belt and the high proportion of repeat visits that occur amongst visitors to the Park.

Reason for Visiting the Area

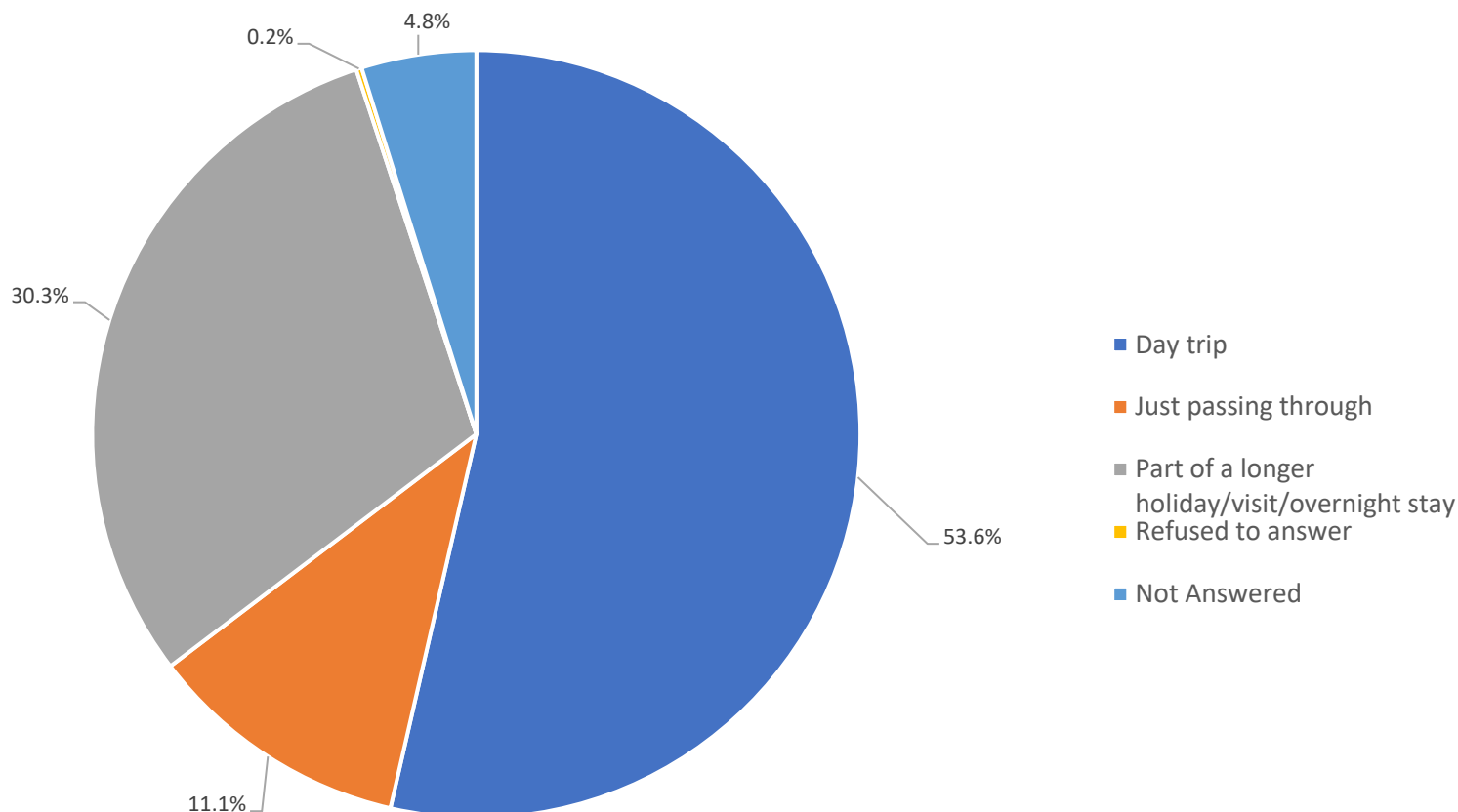


Base = 844 Survey Responses

Length of the Trip to the National Park

- The largest volume of respondents stated that the purpose of their trip was for a day visit with over half of respondents (455 responses).
- 257 participants stated that they were in the National Park as part of a longer holiday/visit/overnight stay.
- 11% of respondents were passing through the Park and stopping. With several major routes through the Park, specifically the west coast route north through Glen Coe to Fort William the Park is a valuable addition to a popular and attractive journey for both car and bus users. While this segment of Park users may be small relative to “active visitors” who come specifically to the Park the additional spend by those passing through will be a valuable contribution to many tourism businesses.
- The proportion of respondents that were day visitors, overnight visitors or transitory visitors (passing through) was central to understanding the probabilities of the number of vehicles entering / exiting the Park and stopping

Length of the Trip

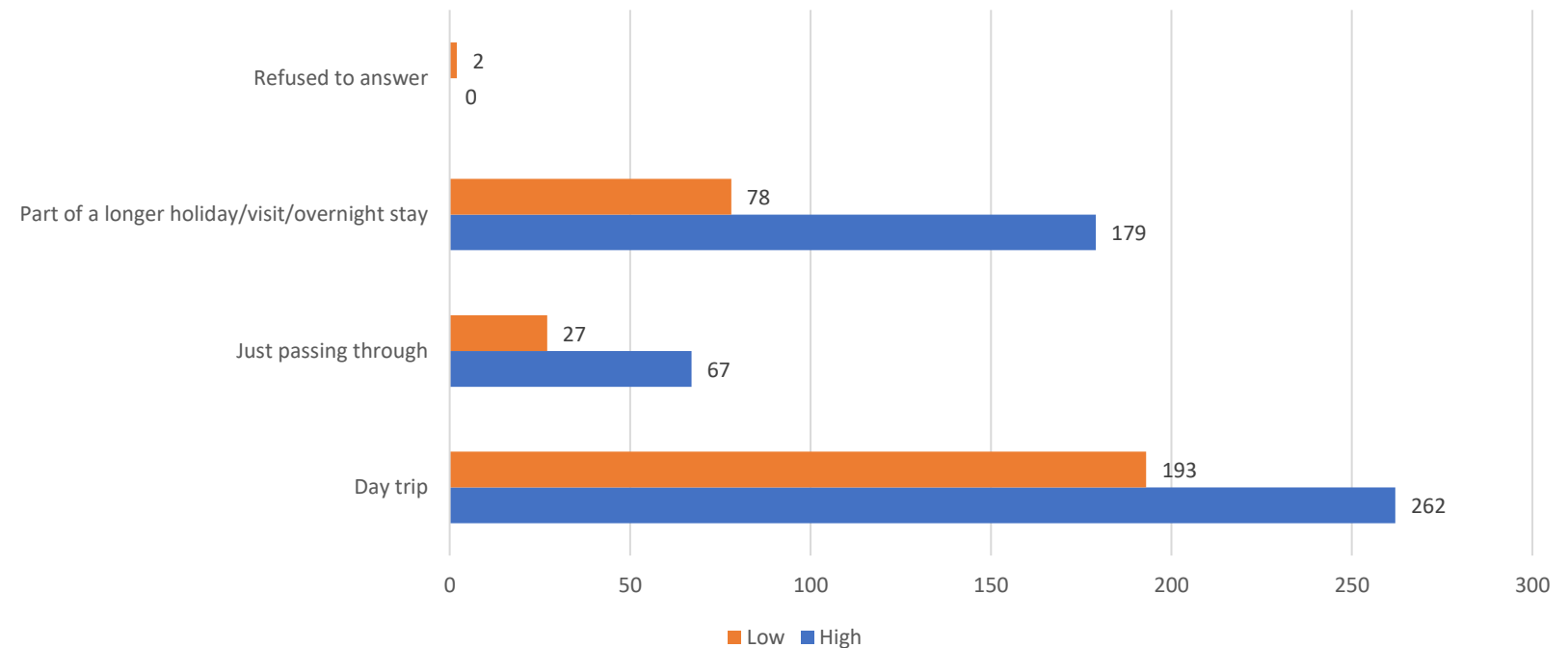


Base = 849 Survey Responses

Length of the Trip to the National Park

- As is to be expected, the share of visitors for overnight stays is greater in summer than in winter, with a difference of 35% in the high season to 25% in the low season by volume.
- Similarly the proportion of visitors passing through the Park is smaller in the low season than in the high season with 9% of low season survey respondents compared to 13% in the high season.
- It is with day visitors that the share reverses seasonally with a higher share of day visitors in low season (65% of survey respondents) compared to 52% of high season visitors.

Length of the Trip



Base = 808 Survey Responses

Visitor Survey Results

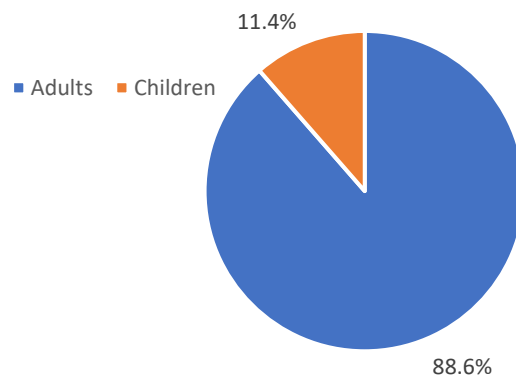
Question Four – How many are in your group?



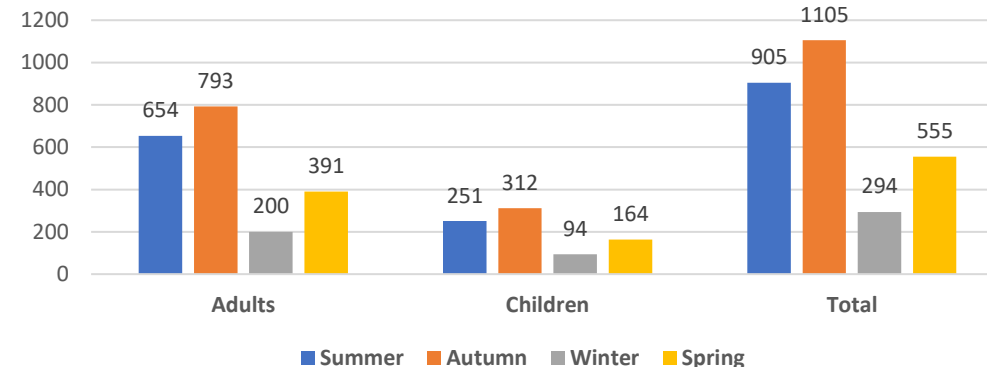
Group Breakdown by adult/child

- Out of the 849 survey responses, there were 2301 people identified as part of the visiting party. This is an average party size of 2.7 persons.
- The largest volume of visitors were adults, with 88.6%.
- The seasonal breakdown shows that autumn had the highest number of responses for both adults and children. The seasonal breakdown was as follows:
 1. Summer (32%)– July to August 2023
 2. Autumn (39%) – September to November 2023
 3. Winter (10%) – December 2023 to February 2024
 4. Spring (19%) – March to April 2024
- Balloch – Loch Lomond Shores had the highest volume of adults, at 15.9% of adult responses being from this location. Loch Katrine had the highest volume of children, with 20.5% of children being counted at this location.

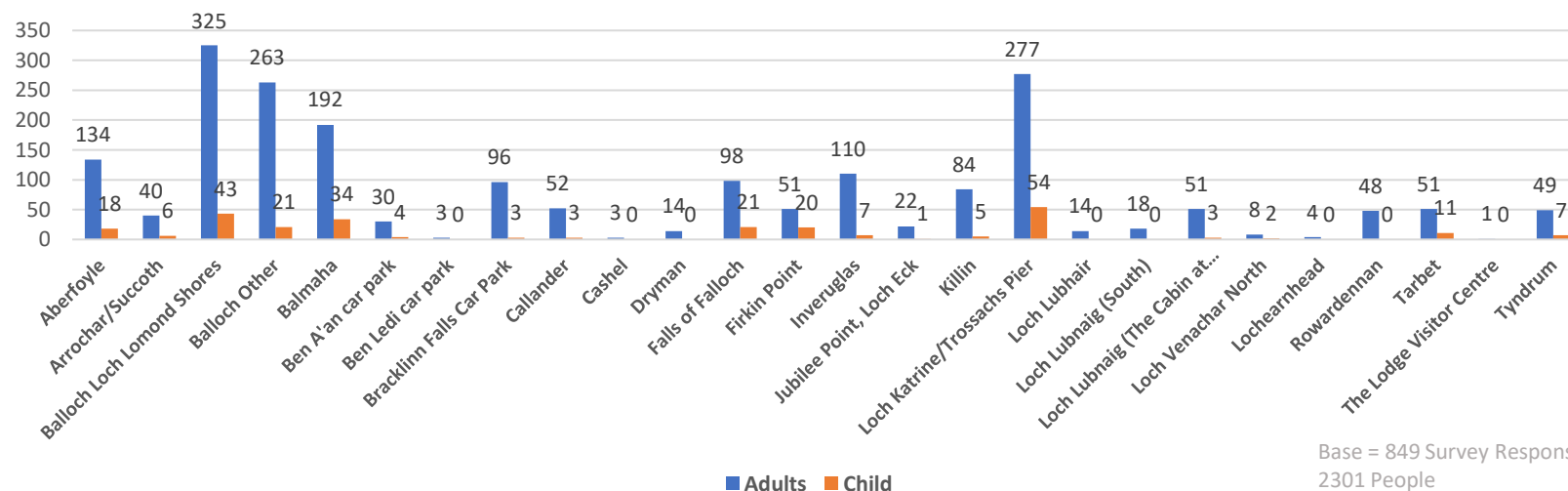
Group Breakdown



Group Breakdown by Season



Breakdown by Location



Base = 849 Survey Responses,
2301 People

Visitor Survey Results

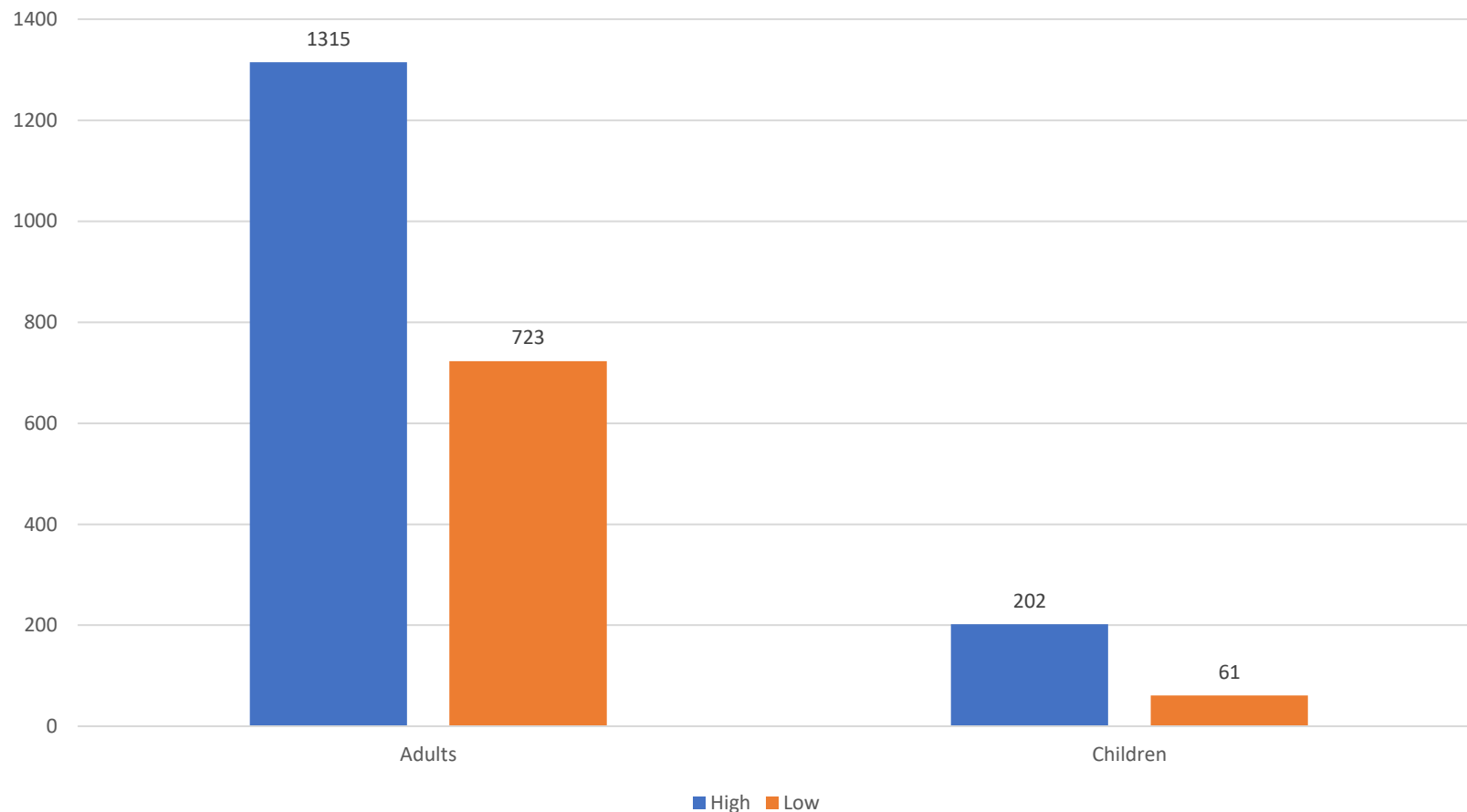
Question Four – How many are in your group?

Seasonal Analysis



Group Breakdown by adult/child

- In the high season, the ratio of children to adults was 1:7. In the low season, this changed to 1:12.
- This can also be expressed as Party Size makeup is 87% Adults / 13% Children in High Season and 92% Adults / 8% Children in Low Season.
- Party size when combined with other variables like transport used provided the multipliers required for the visitor number estimates. Seasonal variations allowed for greater sensitivity within the model to take into account changing visitor behaviour over the year.



Base = 849 Survey Responses,
2301 People

Visitor Survey Results

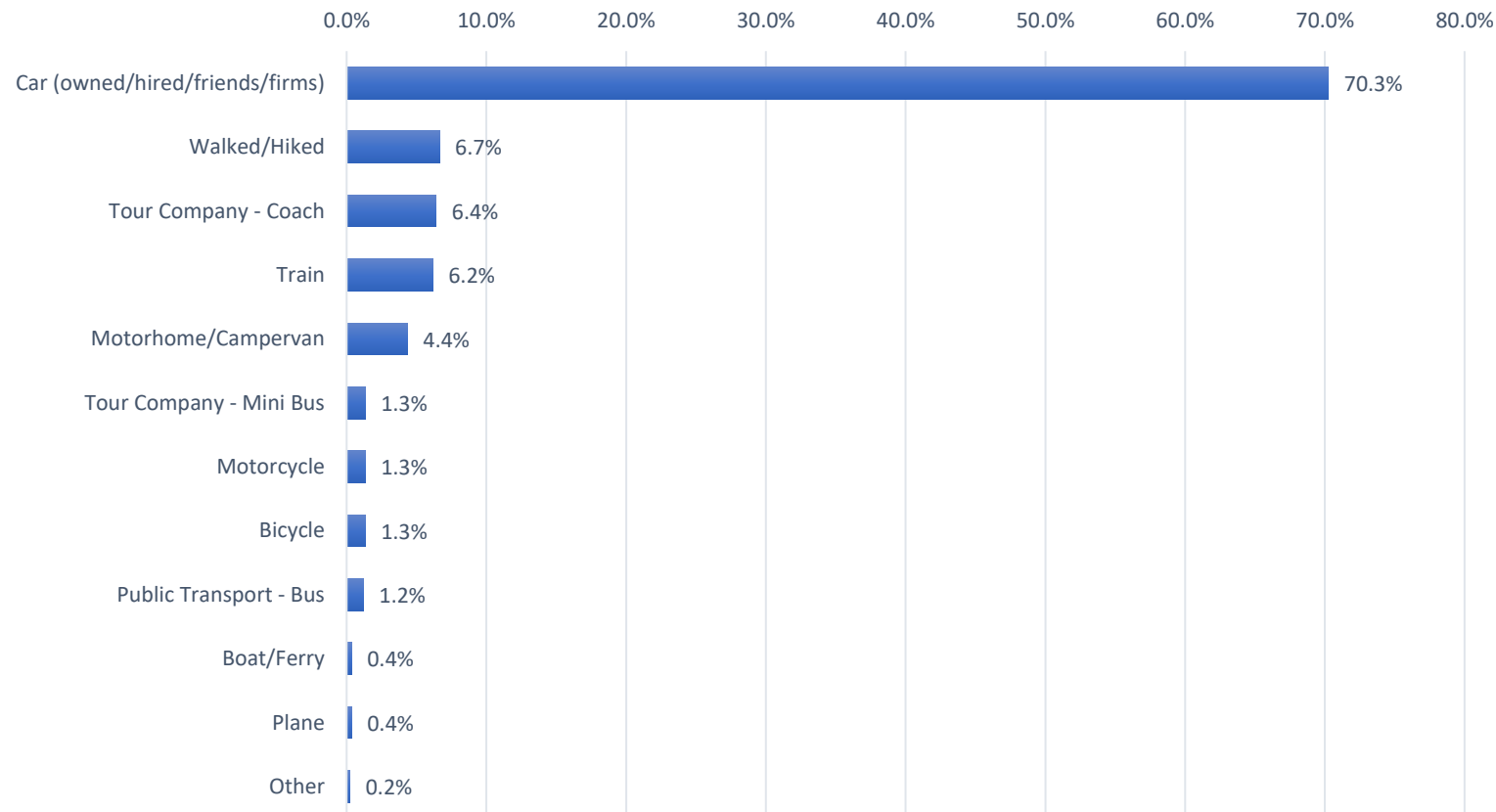
Question Five – How did you travel to the National Park today?



Main Form of Transport to the National Park

- The majority of respondents (70.3%) used a car as the main form of transport to get to the National Park.
- 90% of car users stated that the car was either a petrol or a diesel car. Hybrid was the second most common at 7.1%.
- Of the remaining 29.7% of transport users Tour Coach operators was the highest contributor with 7.7% of respondents.
- Public transport provided by scheduled bus services and trains was comparable in terms of transport used by respondents to that of tour coach users at 7.3%.
- Active travel with visitors walking or cycling represented 8% of respondents. This was observed to be concentrated at trail points recognising the long distance walks that pass through the Park.
- Motorhomes were observed throughout the year of the visitor survey contributing 4% of responses.

Main Form of Transport



Base = 827 Survey Responses

Visitor Survey Results

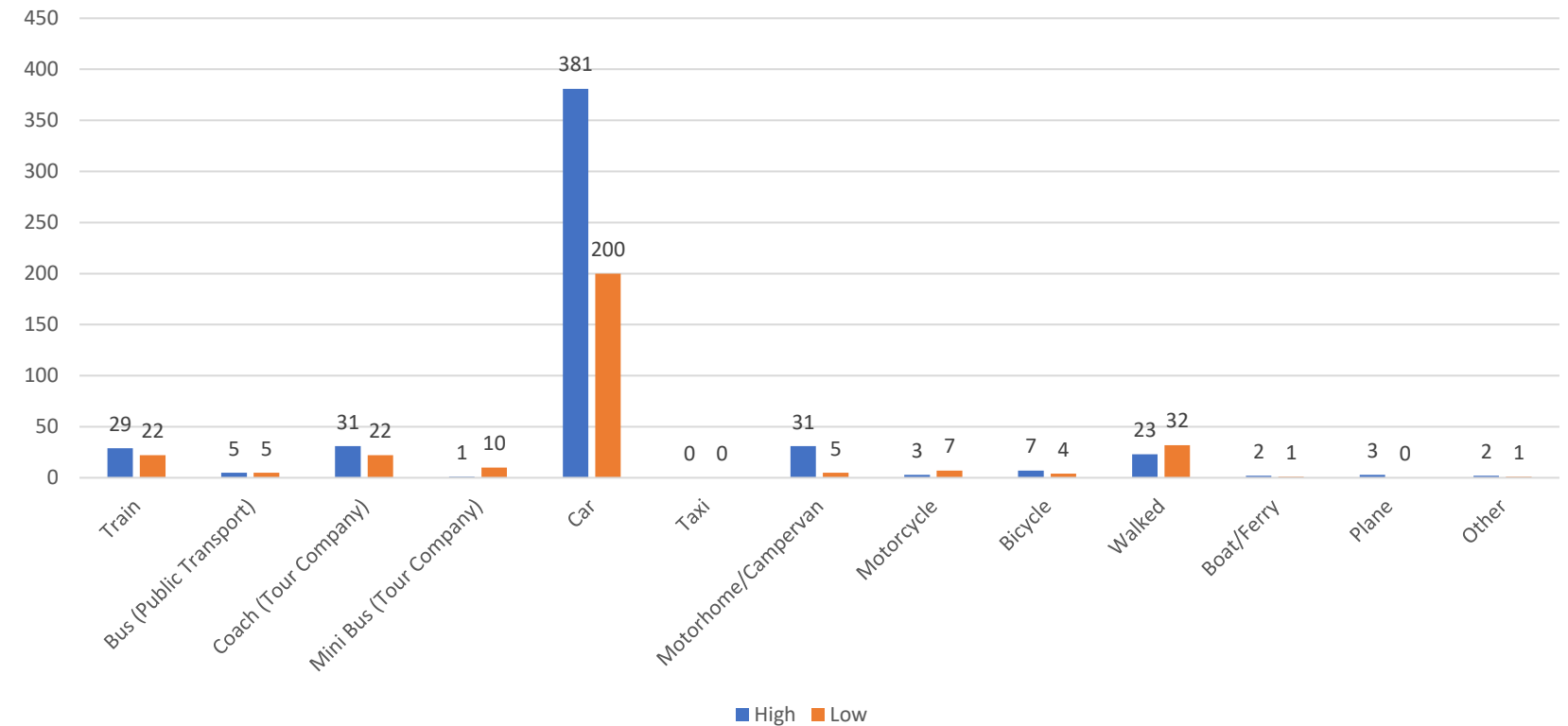
Question Five – How did you travel to the National Park today? Seasonal Analysis



Main Form of Transport to the National Park

- For both the high and low season, the largest response was that people travelled to the National Park by car, at 74% and 65% respectively.
- In the low season, more people responded that they had walked to the National Park. This corresponds with question 1, where there was a higher number of resident surveys in the low season.
- In the high season, 7% of respondents travelled to the National Park by public transport (train or bus). This increased slightly to 9% in the low season.
- In the high season, the average car held 2.99 people, and in the low season, this was 2.59 people per car.
- Transport was identified as the central independent variable to establish the visitor number estimate calculation.

Main Form of Transport

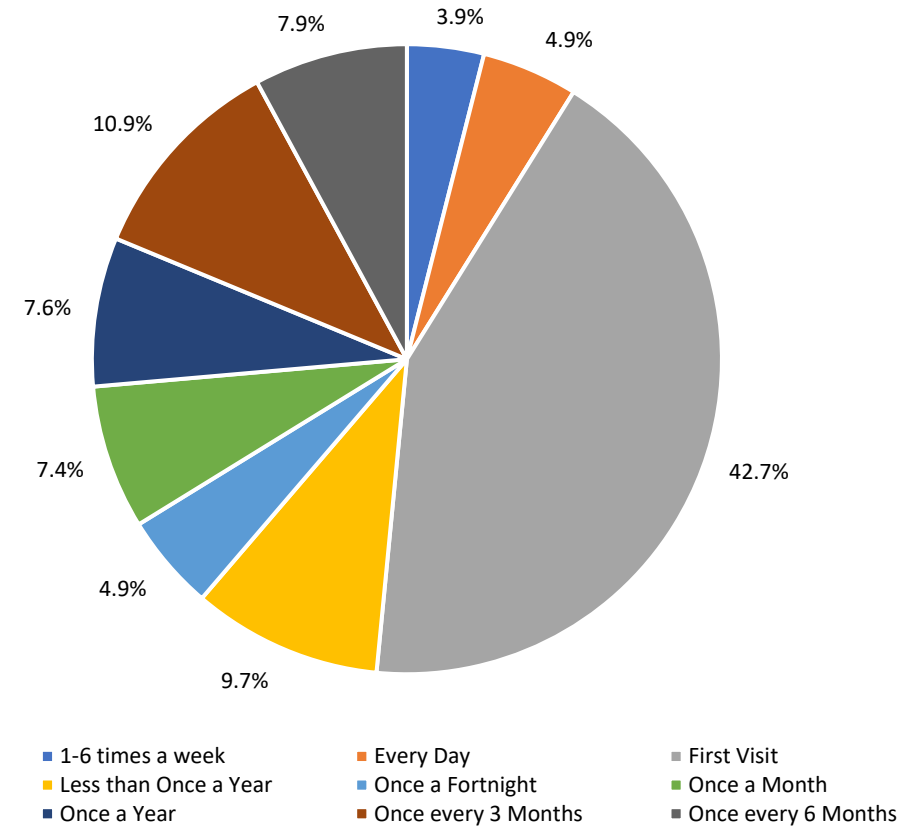


Base = 827 Survey Responses

Frequency of Visits

Frequency of Visits to the National Park

- The largest proportion of respondents (42.7%) stated that it was their first visit to the National Park.
- Majority who stated they visited the National Park daily/1 to 6 times a week were permanent residents.
- All responses were taken on an annual level, for example, how often do you visit the National Park per year?

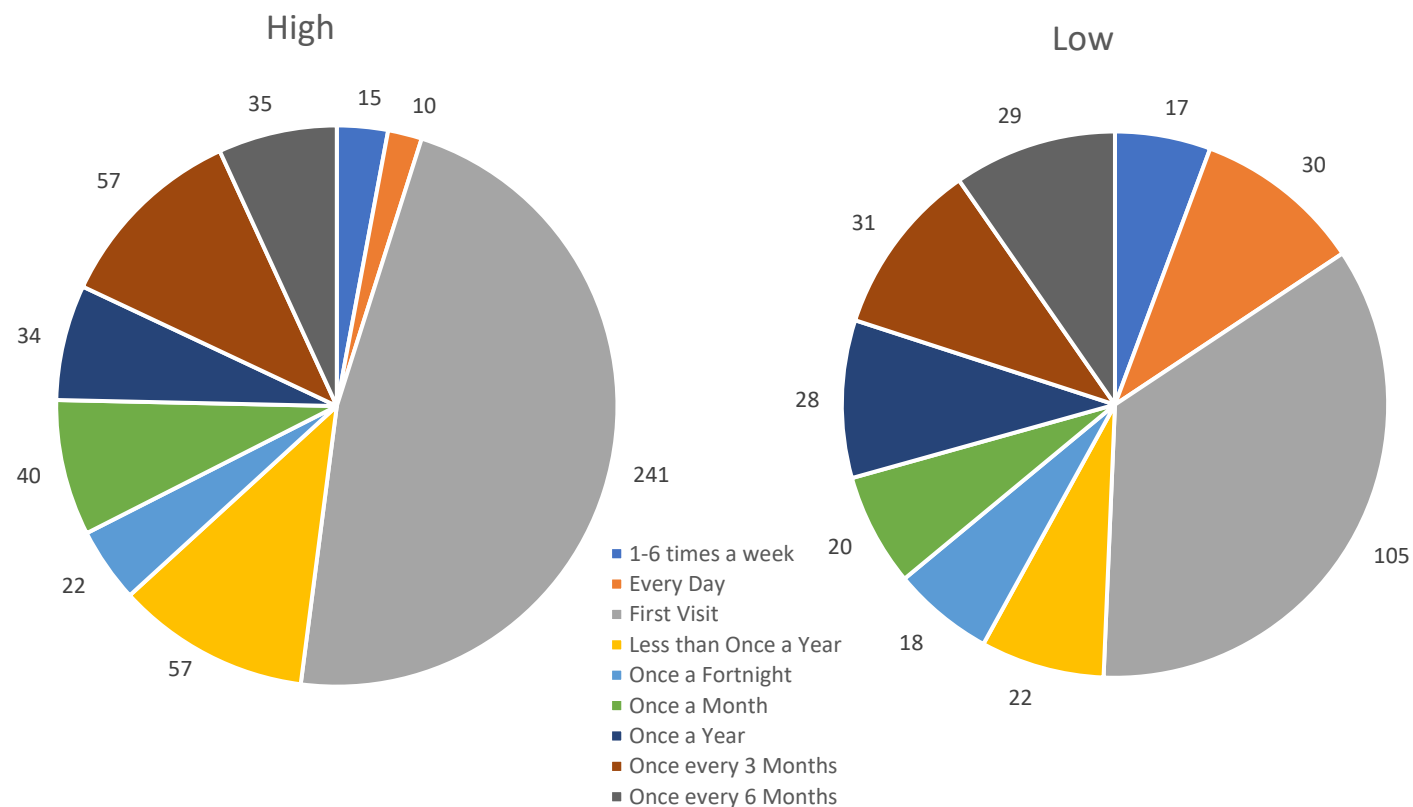


Base = 811 Survey Responses

Frequency of Visits to the National Park

- The most frequent response was that it was the respondent's first time to the National Park during both seasons.
- In the high season, 47% stated it was their first time visiting the National Park. In the low season, 35% stated it was their first time.

Frequency of Visits



Base = 811 Survey Responses

Visitor Survey Results

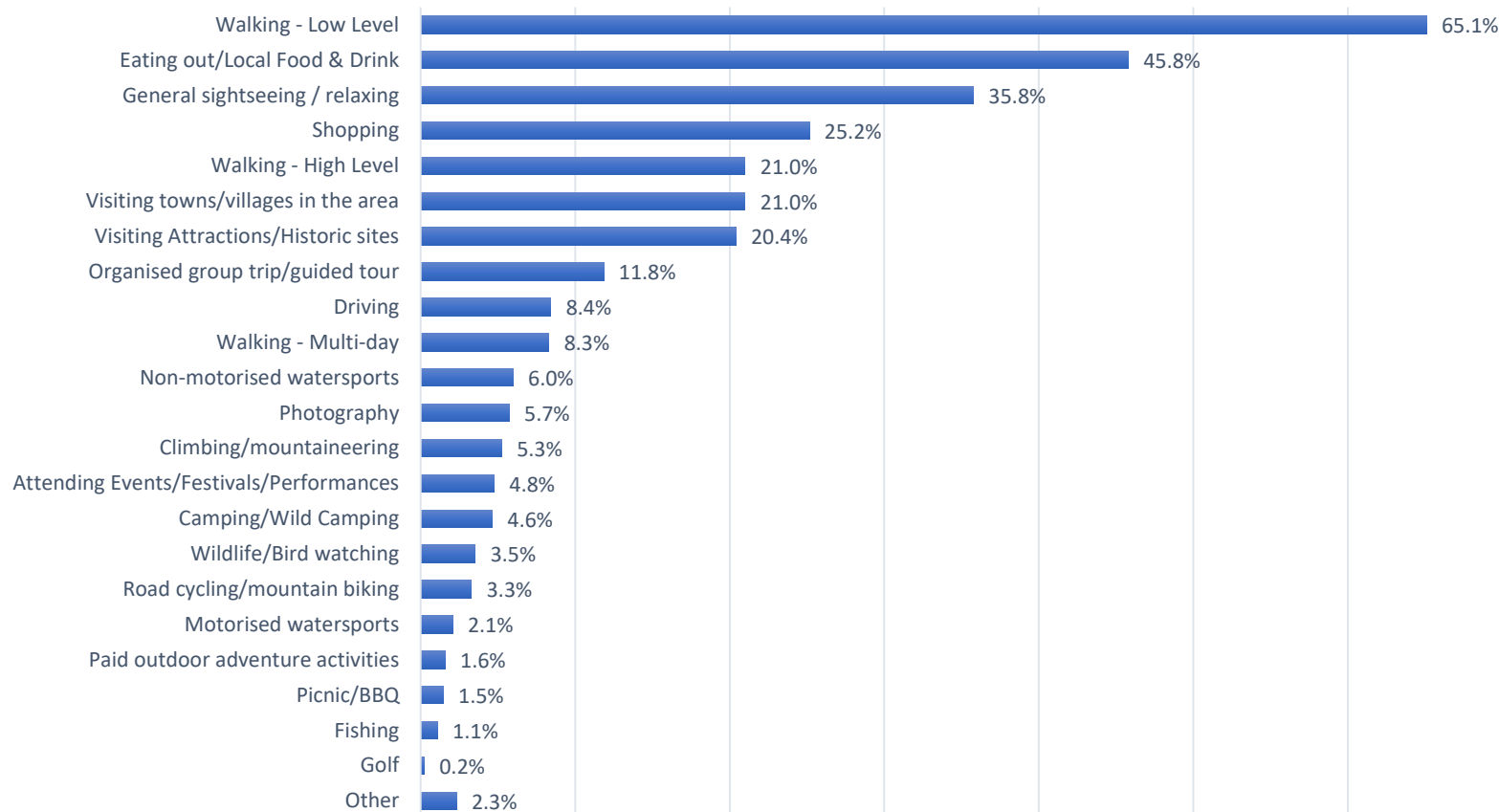
Question Seven – Which of these activities have/will you and your group take part in during your time in the National Park?



Activities Completed/Planned During the Trip

- The top 3 activities participants planned/had completed while on their trip were;
 - walking – low level (65.1%),
 - eating out/local food and drink (45.8%)
 - general sightseeing/relaxing (35.8%).
- Of the respondents the majority of visitors will combine a low-level activity exercise with a food and drink experience and possibly retail.
- Depending on the survey location, visitor attractions and retail become more prominent. However many respondents did travel to multiple locations during a trip to create an itinerary.
- The other activities included; cruises (3 responses), getting married, motor rally, outdoor swimming competition, returning from running the Ben Nevis competition, stopping to walk the dogs, swimming, touring, vintage cars and visiting their family.

Activities Undertaken During Visit



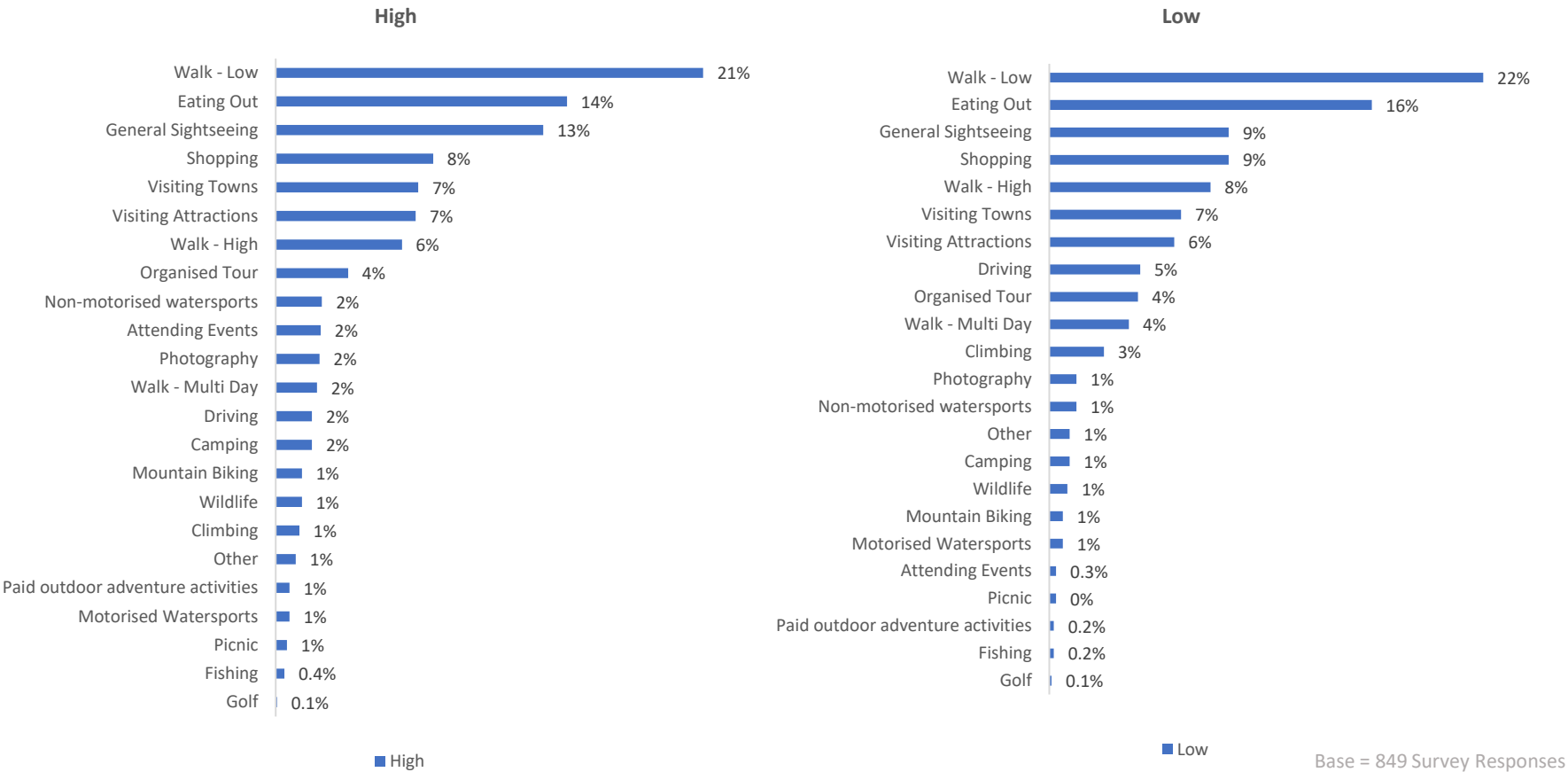
Base = 819 Survey Responses



Activities Completed/Planned During the Trip

- Eating out and low-level walking were the two highest responses for both the high and low seasons.
- General sightseeing was substantially higher in the high season.
- Driving increased as a response in the low season.
- Camping decreased in the low season compared to the high season.
- Analysis of this question determined that the likelihood is a high proportion of visitors may come to the Park and undertake activity that may not have to include a monetary transaction. This is due to the number of activities involving outdoor activities such as walking. The questionnaire responses did highlight that multiple activities take place and that is it highly likely that outdoor activity may also include “Eating Out” or Retail. A model dependent on expenditure activity will undercount visitor numbers.

Activities Undertaken During Visit



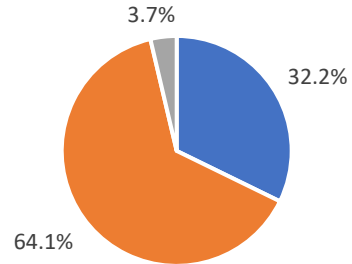
Base = 849 Survey Responses

Visitor Survey Results

Question Eight - Are you staying overnight in the National Park?



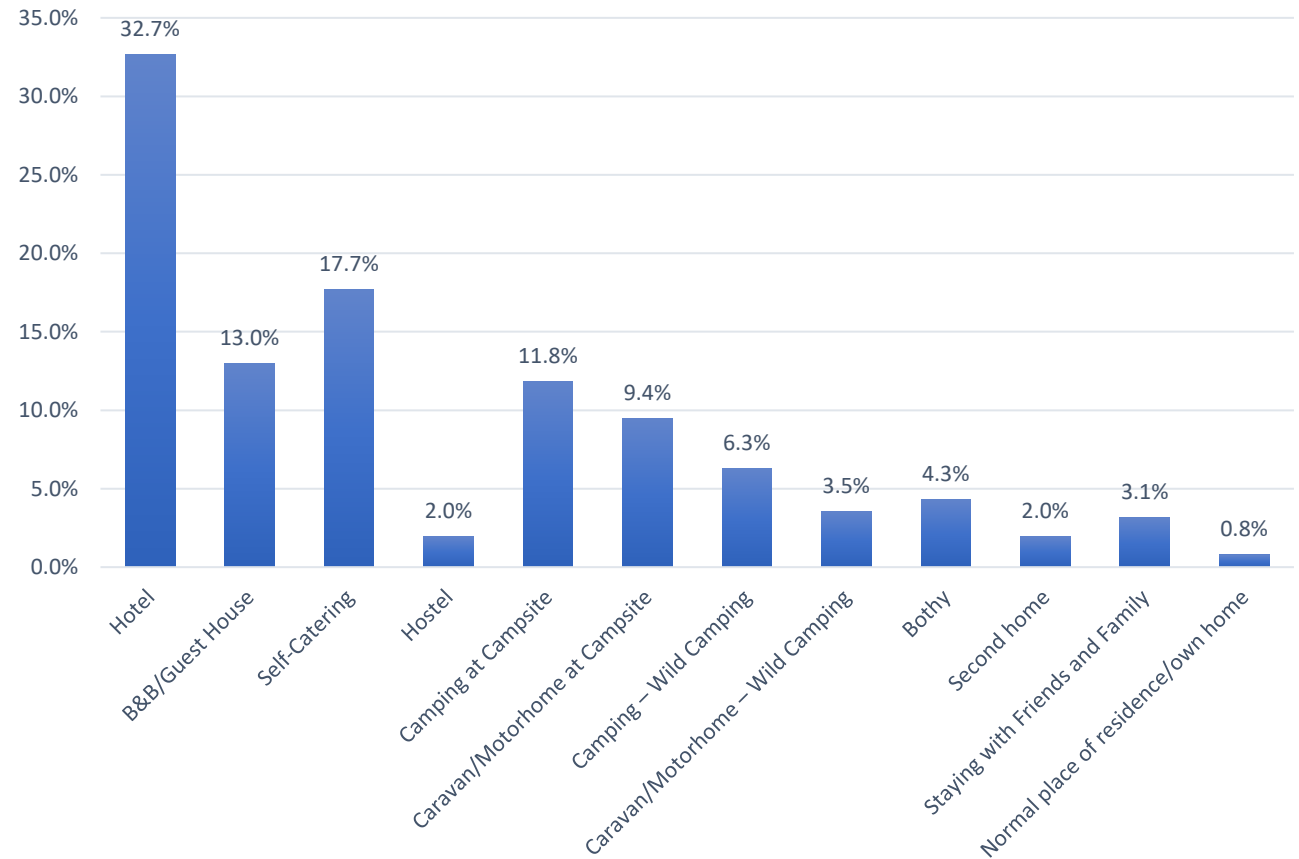
Percentage Staying Overnight



■ Yes ■ No ■ N/A Base = 788 Survey Responses

- The majority of participants stated that they were not staying overnight (64.1%). This correlates with question 3, in which most people said they were there for a day trip.
- The largest number of participants stated that they stayed overnight in a hotel (32.7%).
- While expenditure-based measures were dismissed from the model due to potential undercounting, the accommodation used shows that occupancy rates for serviced and non-serviced accommodation can be used as a validation measure for annual model outputs.
- NOTE – the percentage share of accommodation type is based on the number of survey respondents. For “Bothy” there were 11 respondents surveyed compared to 5 survey respondents for “Hostel”. The average party size for “Hostels” was 2.6 and for “Bothy” it was 3.1 showing Bothy users travel in larger groups.

Type of Accommodation Used



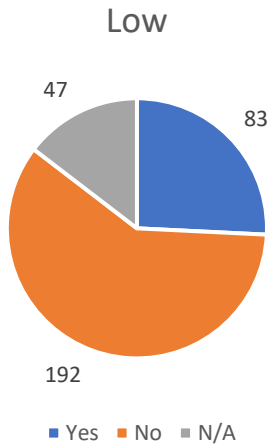
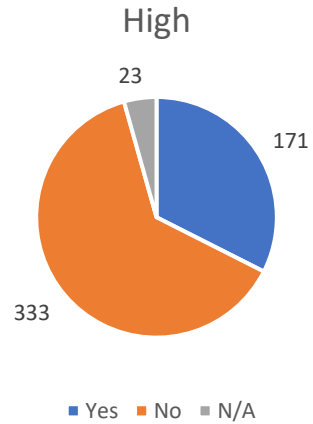
Base = 254 Survey Responses

Visitor Survey Results

Question Eight - Are you staying overnight in the National Park? Seasonal Analysis

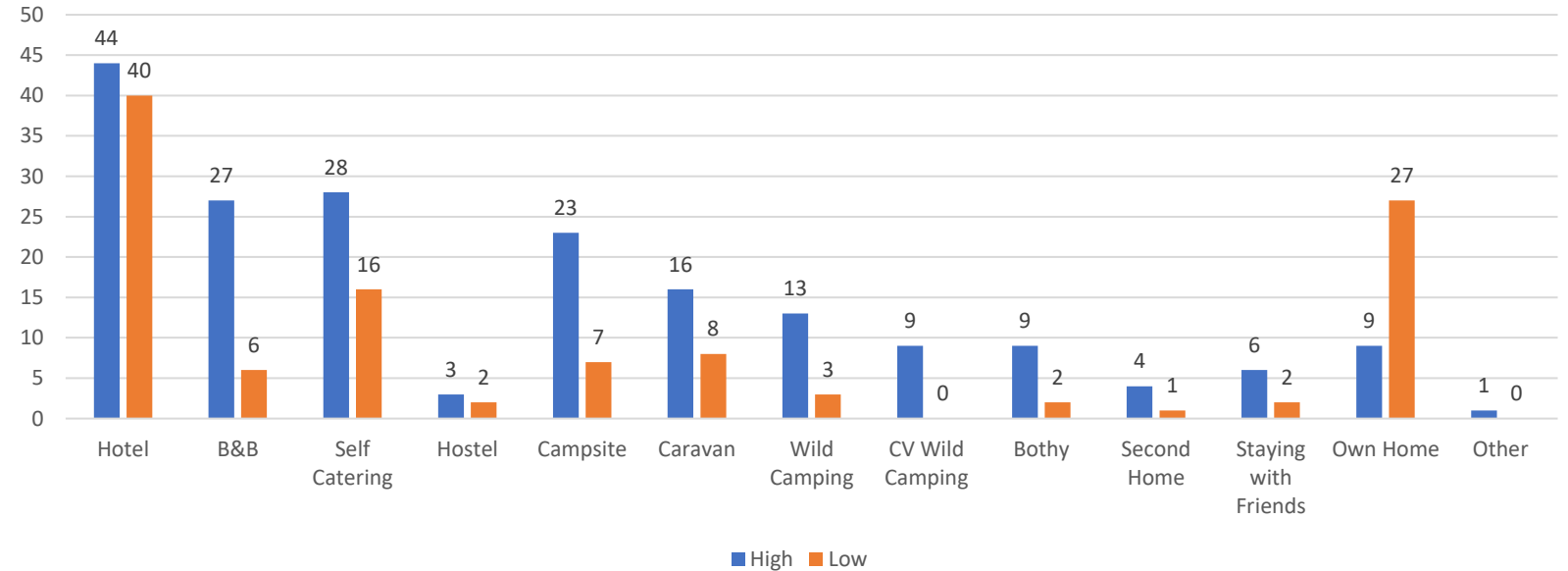


Percentage Staying Overnight



Base = 849 Survey Responses

Type of Accommodation Used



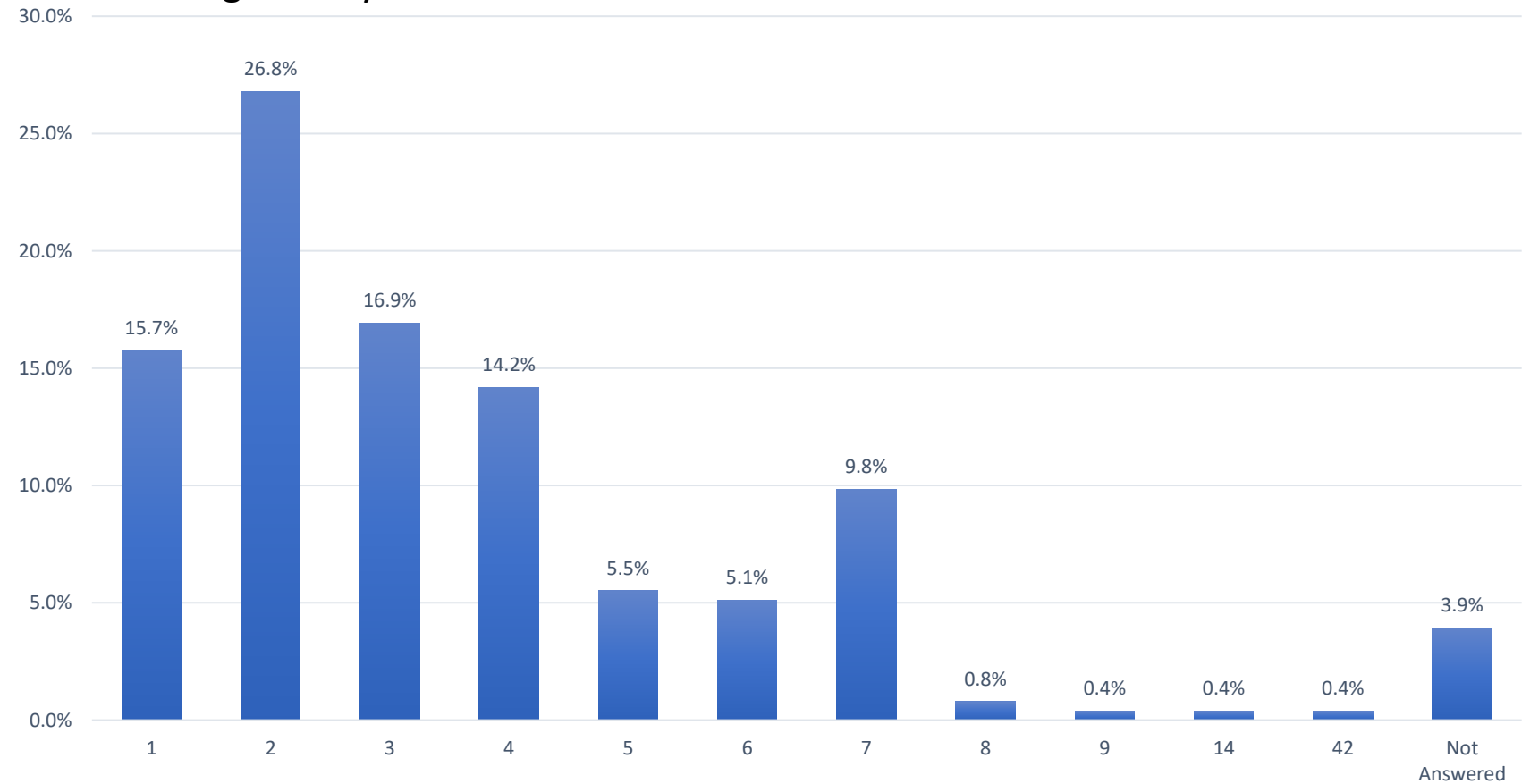
- In the high season, 32% stated they were staying overnight, and 63% stated they were not. In the low season, 26% stated they were staying overnight, while 60% stated they were not.
- Hotel usage remained the highest for both seasons.
- Camping and wild camping decreased the most in the low season.
- Comparable numbers of overnight survey respondents stayed in self-catering accommodation with 53% of high-season respondents compared to 50% in low season.

Base = 254 Survey Responses

Length of Stay in the National Park

- The largest volume of participants stated that they were staying for 2 nights in the National Park.
- Majority of responses stated that they were staying the National Park for a week or less (239 responses), with 5 people stating that they were staying for a longer duration, the highest being 42 days overnight.

Number of Nights Stayed in the National Park



Base = 254 Survey Responses

Visitor Survey Results

Question Nine – How many nights are you staying in the Park?

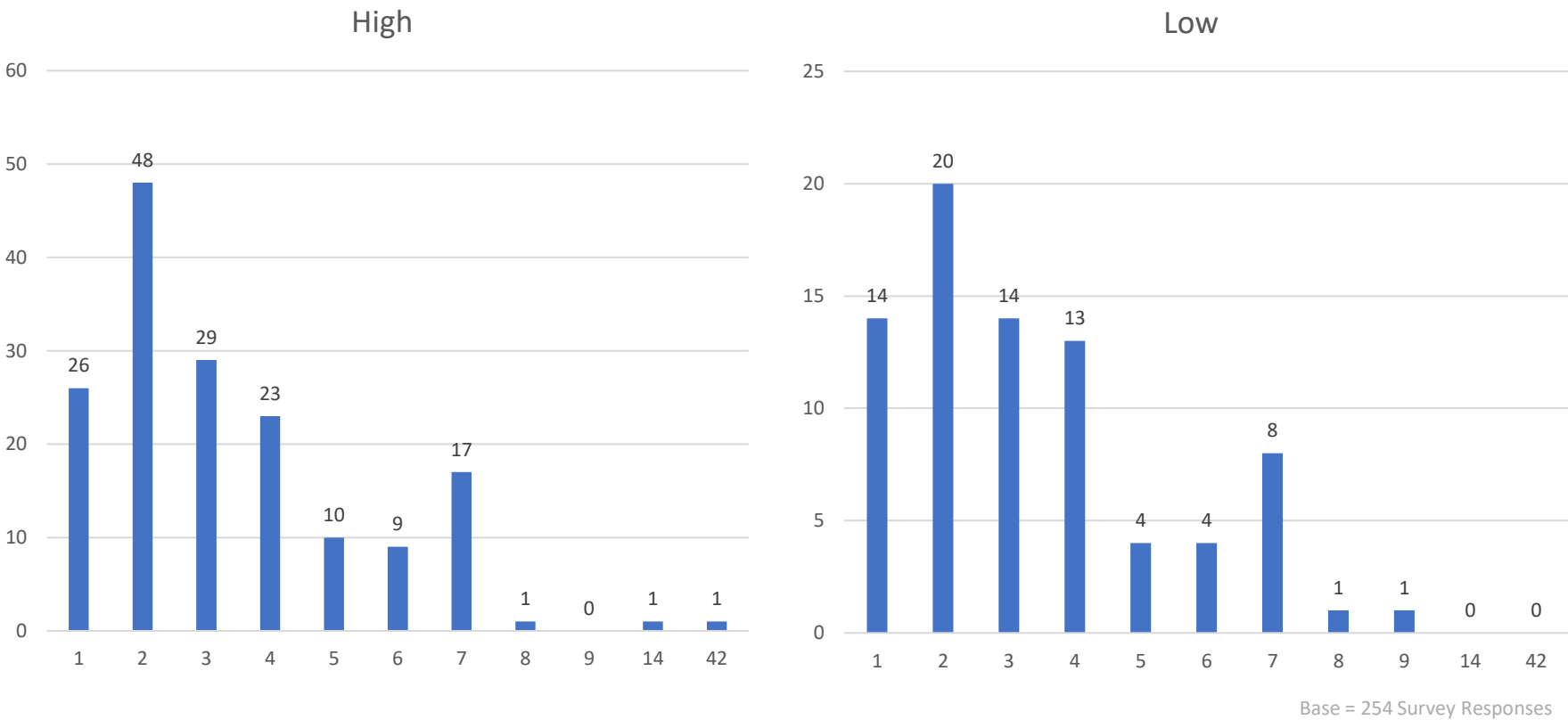
Seasonal Analysis



Length of Stay in the National Park

- As shown from both graphs, they have a similar shape in terms of the peak at 2 days for both low and high seasons, before dipping and increasing again at 7 days.
- Both seasons have people staying longer than a week, with 42 nights in the National Park being the longest in the high season.

Number of Nights Stayed in the National Park



Visitor Survey Results

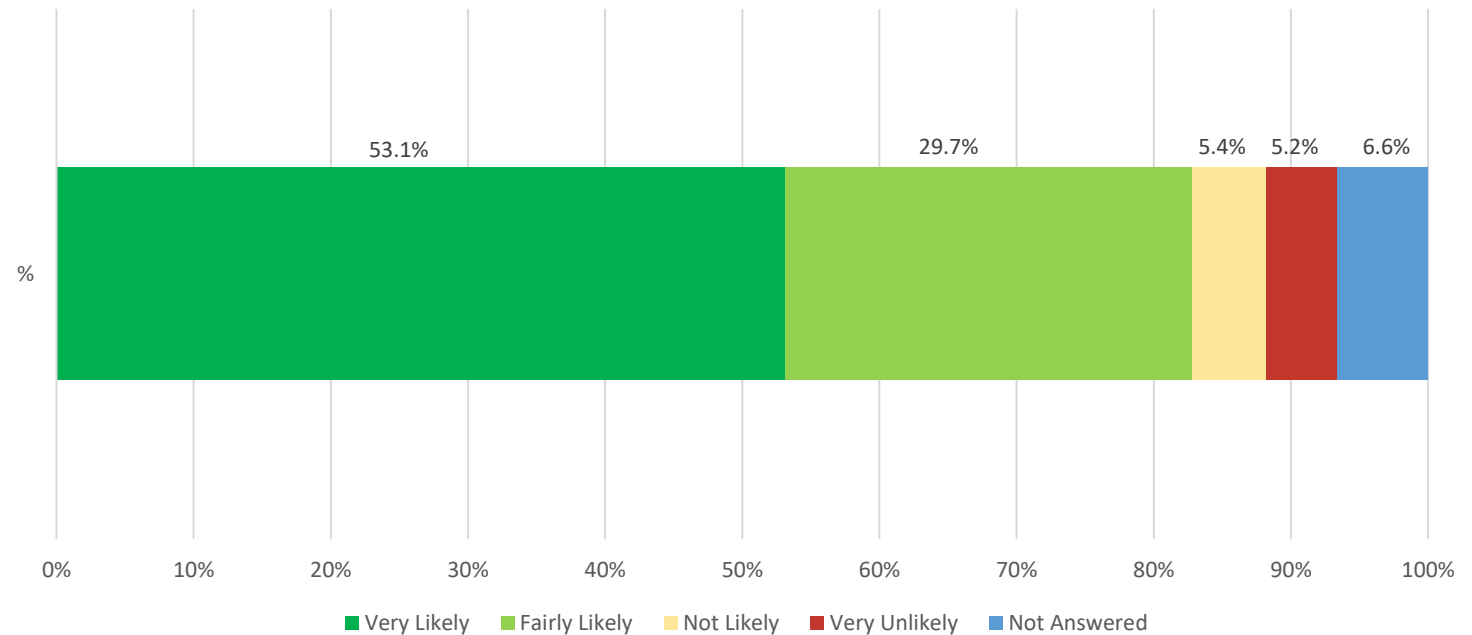
Question Ten – How likely are you to visit the National Park area again?



Likelihood of Visiting the National Park

- The majority of participants stated that they were “very likely” to visit the National Park again, at 451 responses (53.1%).
- The question asked was phrased as “how likely would you be to visit the National Park within the next year?”

Likelihood of Visiting the National Park Again

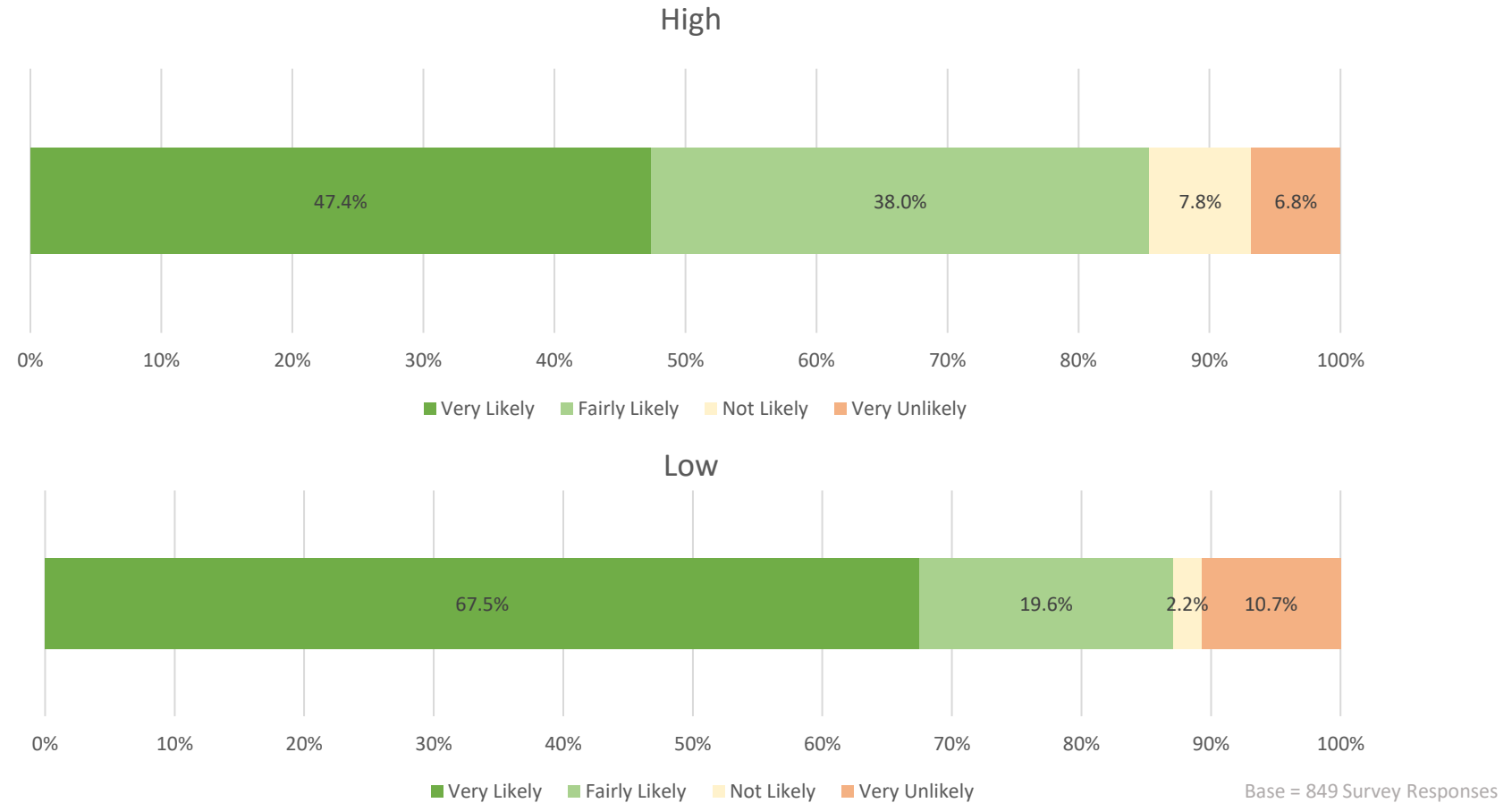


Base = 849 Survey Responses

Likelihood of Visiting the National Park

- 85.4% of respondents in the high season said that they were very or fairly likely to return to the National Park within the year.
- 87.05% of respondents in the low season that they were very or fairly likely to return.
- The high proportion of repeat visitors is related to the location and accessibility of the Park to a high proportion of the domestic population and the quality and variety of activities and attractions the Park has.
- Visitors from the rest of the UK and international visitors also expressed a desire to return to the Park should the opportunity present itself. It is recognised that for some long-haul international visitors this may have been their only visit to Scotland / UK so the response on very likely to return would be an expression of experience rather than brand loyalty.

Likelihood of Visiting the National Park Again

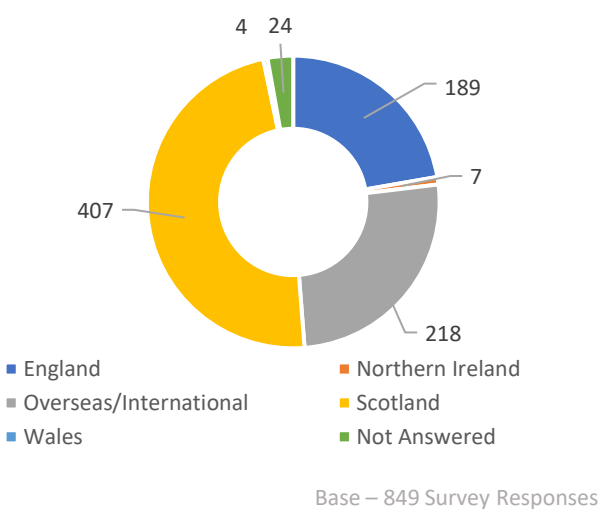


Visitor Survey Results

Question Eleven – Where is your place of residence?

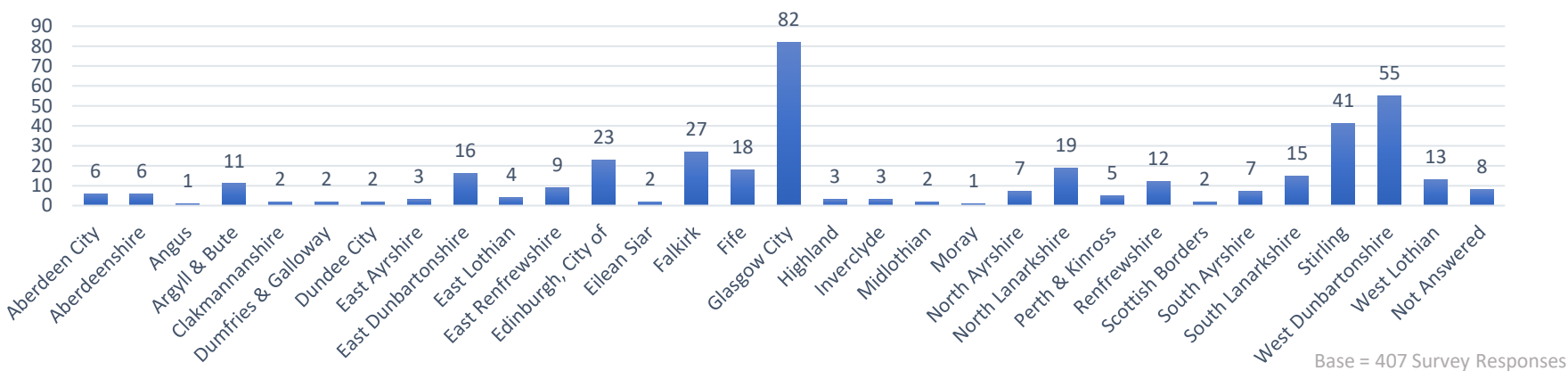


Breakdown of Residence

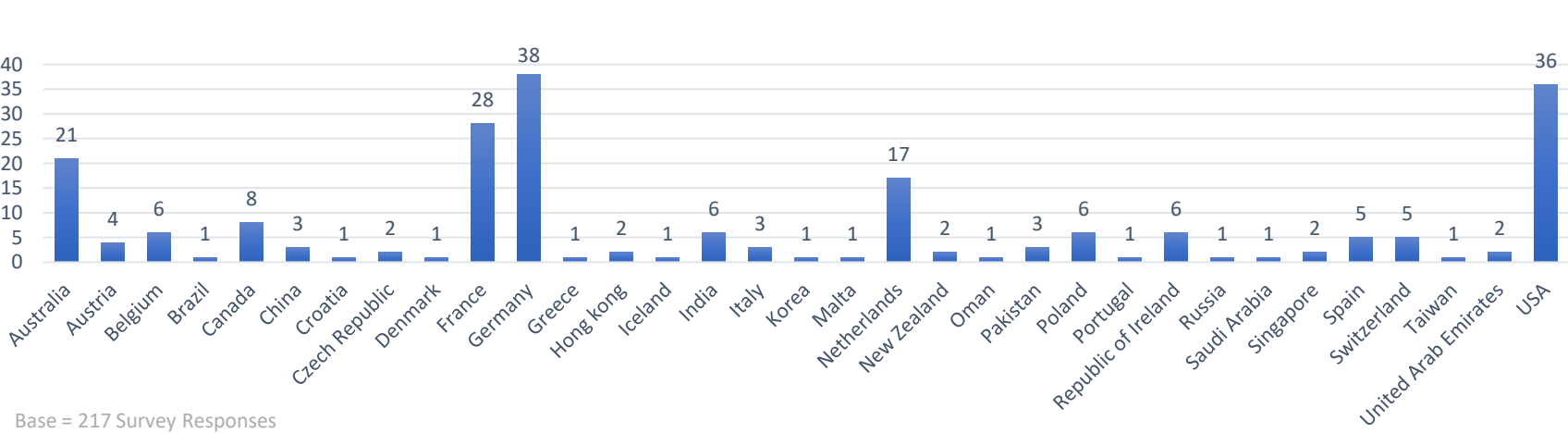


- The largest volume of participants were from Scotland (47.9%). 607 of the participants (71.5%) were from the United Kingdom.
- The highest proportion of Scottish visitors reside in City of Glasgow (20.1%).
- The highest volume of overseas visitors were from Germany (17.5%). This was closely followed by the United States of America (16.6%). 58.1% of visitors were from Europe (126 responses).

Place of Residence by Local Authority (Scotland)



Place of Residence – Oversea Visitors



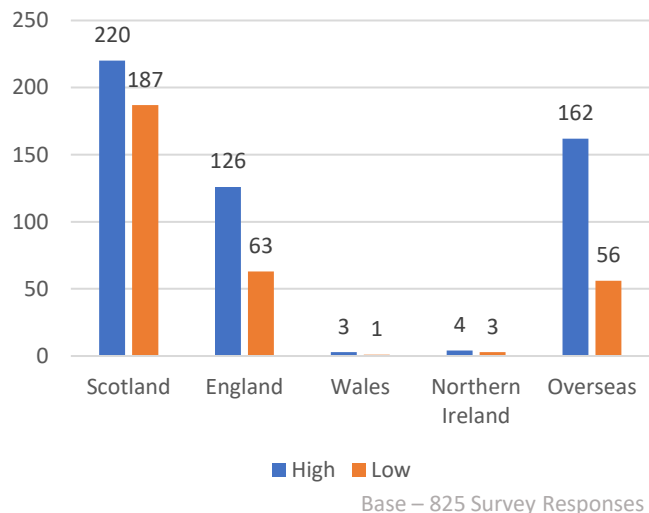
Visitor Survey Results

Question Eleven – Where is your place of residence?

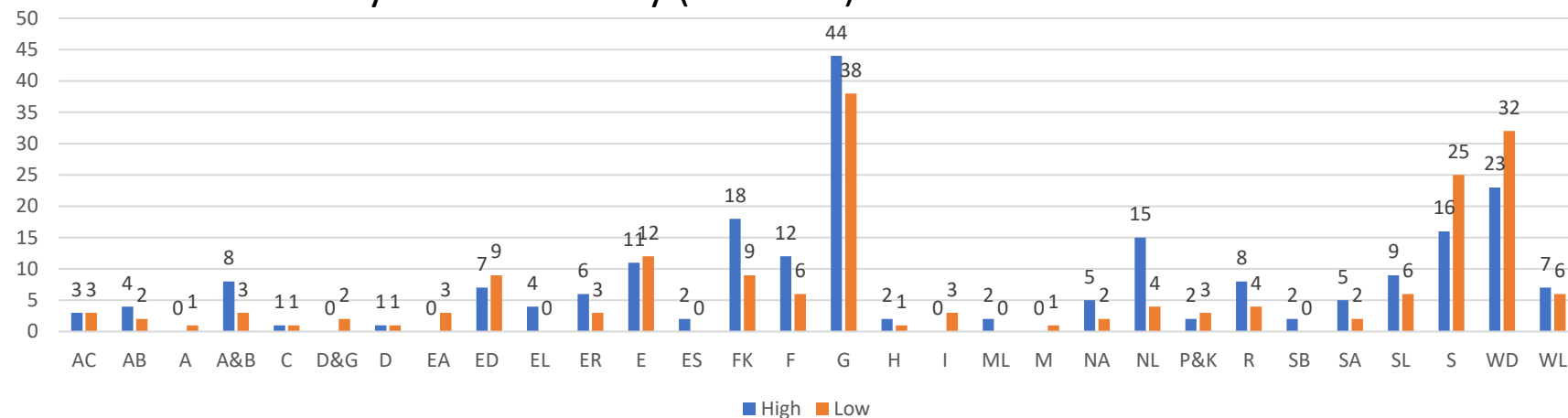
Seasonal Analysis



Breakdown of Residence



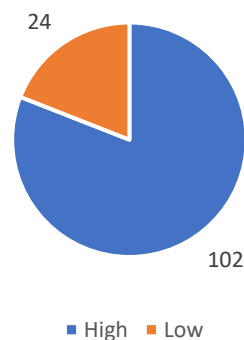
Place of Residence by Local Authority (Scotland)



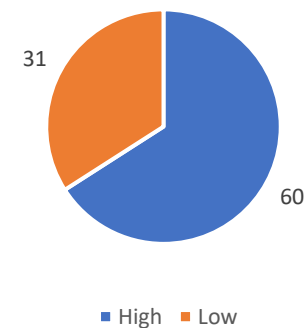
Place of Residence – Oversea Visitors

- In the low season, 19% of all European residents attended the National Park. 34% of the Rest of World residents attended the National Park in the low season.
- Stirling and West Dunbartonshire were the only low-season results to be higher than the high-season, due to more respondents being local residents.
- Scotland had the highest amount of residents in both seasons, with the biggest difference being between the Overseas residents.
- Similar to accommodation occupancy, national visitor monitors such as the International Passenger Survey from the ONS and the Great Britain Tourism Survey from the GB National Tourist Boards can be used as validation measures for the annual model.

Europe



Rest Of World



Annual Visitor Volume Model



The Annual Visitor Volume model was developed from an understanding of visitor behaviours within the Park taken from the visitor survey. Analysing the different variables, evaluating published data sources and validating benchmarks resulted in a model that placed transport central to its calculation and found that visitor volume to the Park in 2024 was 4.54 million visitors.

Building the model started with the visitor survey identifying that transport used was central to measuring visitor volume to the Park. With the car being the dominant vehicle type traffic counter sources from Transport Scotland were obtained. Transport Scotland maintains and publishes traffic monitoring data covering multiple locations in and around the Park on a timely and regular basis.

The Transport Scotland data shows monthly traffic flows in both directions and provides details of Axle Length to determine Car, Van, Truck and Bus. There is also a lengthy time series that was used to provide back-casting of visitor figures for the model to verify the outputs.

Using the car/transport premise, the initial development stage identified the traffic counters covering the Park's principal entry/exit points. Five locations were identified and detailed later in the report. Having the locations we could access the monthly traffic flows. Processing the counts to establish multi-directional traffic entering/exiting the Park as a ratio. The data at this stage covered all vehicles, regardless of whether they were residents, commercial traffic, visitors, transiting and stopping or continuing through the park without stopping.

To determine the vehicles that represent visitors compared to vehicles passing through the Park a modified Markov model was developed (See Notes) to establish the proportion of vehicles which represent each group, visitors or transit. In probability theory, a Markov model is a stochastic or random probability model from which a random probability distribution may be analysed statistically. The random probability testing determined, based on available data, the general probability of a vehicle being a visitor and stopping or not.

In 2023, the number of cars recorded at the five identified points of entry/exit was calculated to be 8.7 million per annum.

The probability model determined it depends on whether it is High or Low season, between 13% and 17% of cars will stop in the Park and have "visitors". The remainder of the vehicles will be commercial vehicles, Park residents or vehicles passing through the Park to destinations outside the Park Authority boundary.

Once the Visitor Vehicle numbers were identified, multipliers based on party size and seasonally adjusted were applied to the vehicle counter data. This provided the volume of visitors who came to the Park by car or around 70% of all visitors. The 70% figure was taken from the visitor survey.

A further upweight of 30% as a proxy was applied to represent visitors using other forms of transport. Limited access to reliable data sources during the project was restricted using more detailed data which would be provided by tour coach operators (annual passenger numbers), train and public bus users, and active travel taken from trail counters on the long-distance routes. Having reliable annual figures from these sources as absolute figures would replace the 30% proxy and provide greater accuracy and variability.

Annual Visitor Volume Model



The final stage of the model development was validation against other data sources.

With no comparable model for visitor numbers to the Park, the validation sources were used to show trends and magnitudes of scale to see if the Visitor Volume Model followed a similar or different pattern. If there was a divergence of pattern from the validation sources, an investigation into “why” took place as there may be a genuine reason for the difference or it is an anomaly in the model.

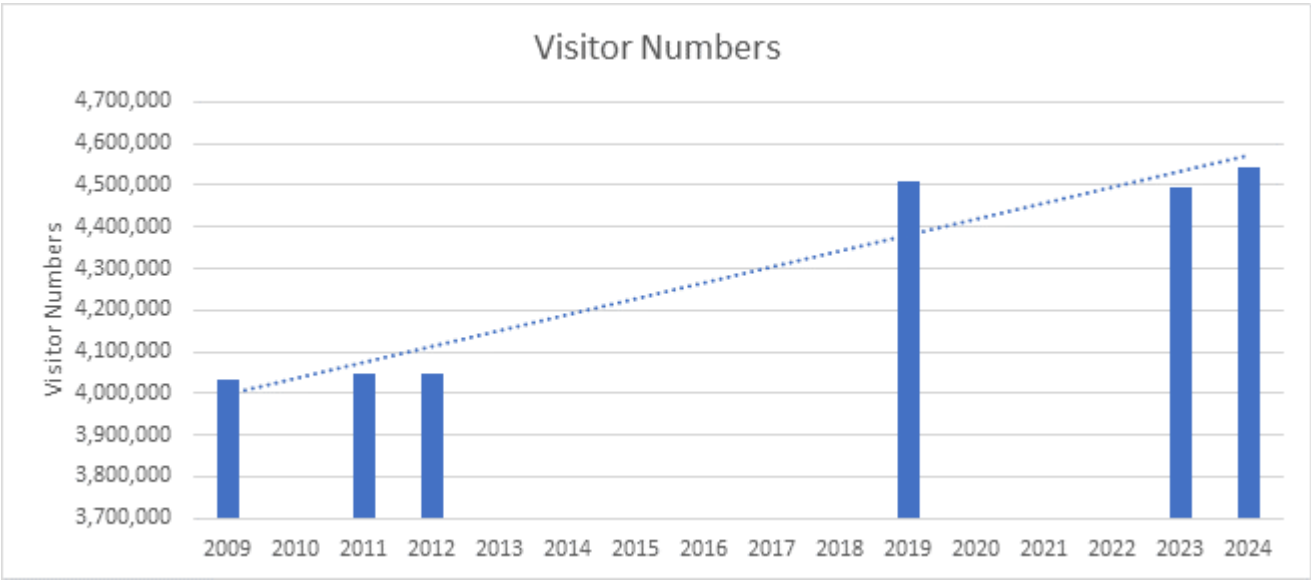
STEAM data is the closest data source to the LL&TNP Visitor Volume model. STEAM is an established tourism economic

impact model and is available at local geographies. Some disparities were observed between STEAM and the Visitor Volume model however these were accounted for through the Visitor Volume model measuring non-expenditure related activity within the Park.

The following table shows the volume of visitors to the Park in specific years. The baseline year for the model build was 2023 which relates to the period the visitor survey was undertaken. Three further years were back cast using the model. The years selected related to years where a published Park visitor survey or visitor volume analysis was available to calibrate results.

Estimated Visitor Numbers to Loch Lomond and Trossachs National Park

Year	2009	2011	2012	2019	2023 (baseline)	2024
Arrivals by Car	3,103,208	3,111,676	3,112,846	3,467,348	3,456,135	3,495,161
Arrivals by Other Transport Type	930,962	933,503	933,854	1,040,204	1,036,841	1,048,548
Total Visitors	4,034,170	4,045,179	4,046,700	4,507,552	4,492,976	4,543,709



Annual Visitor Volume Model

Visitor Vehicle Flow Modelling



We identified 5 key entry points and exit points within the Park and the flow through these points was analysed as follows:

From the historic Transport Scotland monthly counts of vehicles passing counters on Trunk Roads we estimated business, education & normal shopping flows as 80 per cent of the average flow of November January and February. Any entries above this figure were assumed to be visitor vehicles.

For example, the June Visitor figure would be the difference between the total June flow and 80 per cent of the winter mean. The 80 per cent

proportion is critical. At 10 per cent (90 per cent) we started to obtain negative figures for the winter months, and 30 per cent (70 per cent) was judged to be too high.

Published nationwide research on seasonal patterns in recreation (Scottish Household Survey) suggests that the proportion might be higher (c25 per cent) and assessing this should be an urgent candidate for further research.

Visitor Vehicle (VV) Flow is simply the total of the monthly differences for the year at that entry point. We then calculated the average ratio between the Total July Flow and

Annual Visitor Vehicle Flows for all the Transport Scotland entry points. The Total VV Flow through Entries was then calculated along with the Total VV Flow through Exits

From our Visitor Survey, car occupancy on leisure (holiday and recreation) trips was identified. This number was applied to VV flows to obtain estimates of Numbers passing through Park Numbers stopping or on Day Trip to Park

T.C. Ref	Road
108370	A82 Crianlarich (Core 903)
ATC00001	A85 West of Comrie
JTC08216	A84 Doune
JTC00016	Balloch
ATC08090	Succoth

Location of Transport Scotland Traffic Counters (T.C.) used in the Visitor Volume Model



Visitor Number Estimates - Annual Figures



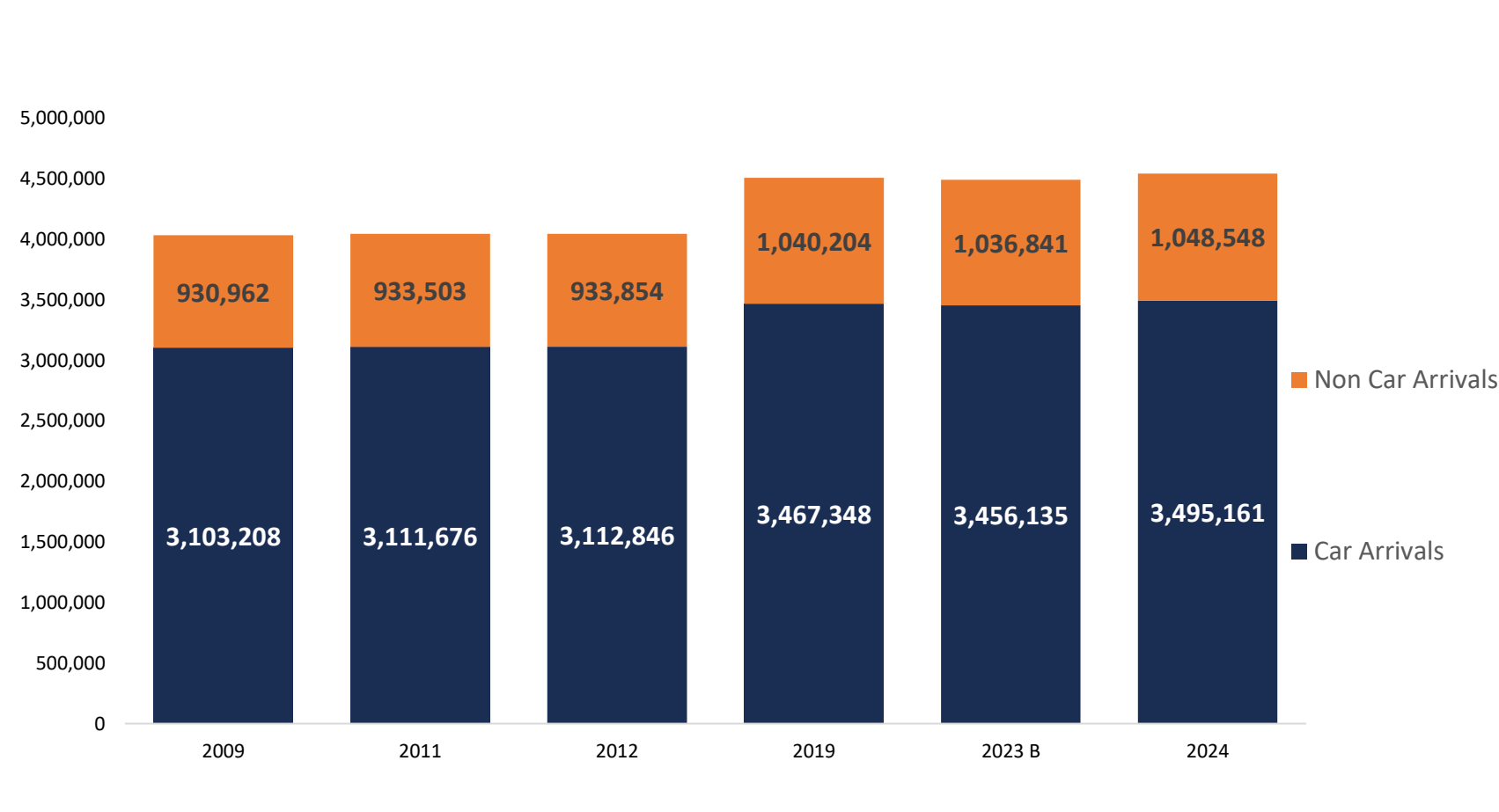
Using the monitoring of vehicle entry and exit through key locations around the Park and the additional visitors from non-car-based transport, it is estimated that for the baseline year (determined from the data collection period) 4.53 million visitors came to the National Park in 2024.

Using the ratios from the baseline year and applying these to 2009 (the year of the previous visitor estimate study), 2011 and 2019 (pre-COVID) there were 4.0 million visitors in 2009, 4.046 million in 2011, 4.047 in 2012 and 4.51 million in 2019.

There is, based on the visitor survey, an approximate ratio of 70% of arrivals by car and 30% by other means of transport (Train, Coach, Bus, Active Travel). As the “other means of transport is currently calculating a proxy from the car arrivals there may be an under/overestimation in the figures presented in the table.

At the main road entry points to the Park in the High season (Apr-Sep) 5.0 million vehicles enter the National Park and 3.7 million vehicles enter the Park in the Low season (Jan-Mar / Oct-Dec).

Estimated Visitor Numbers to Loch Lomond and Trossachs National Park



Visitor Number Estimates Annual Seasonal Figures



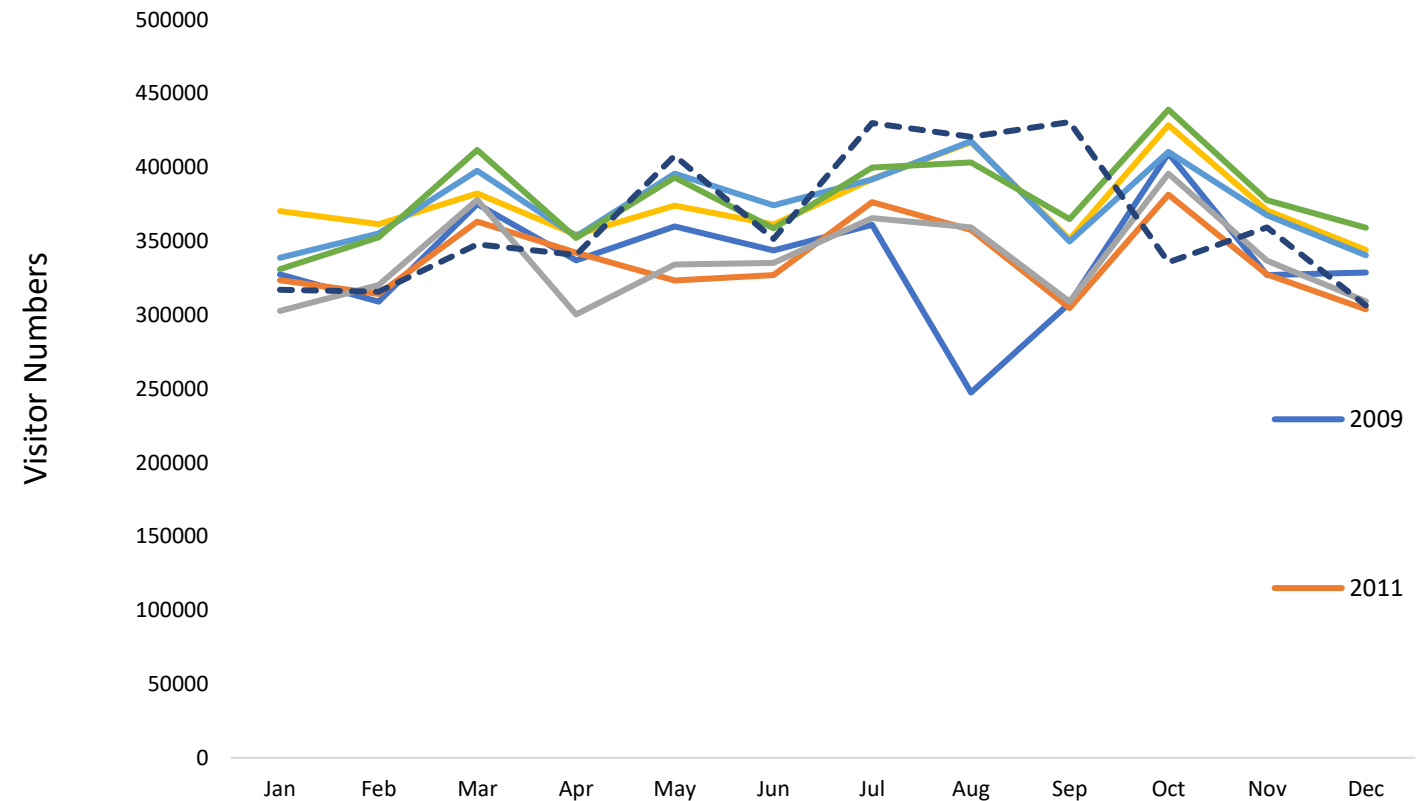
The objective of this model is to estimate annual visitor numbers to the park. The visitor survey was to profile visitors seasonally and then apply this insight to metrics associated with these behaviors such as transport used, and activities undertaken. While the annual figure was the main objective of the study, the model provided monthly figures showing seasonality.

While not following a traditional Normal or “bell curve” distribution, the model shows three clear seasonal spikes in visitors over a typical year. There is Easter (March/April), Summer (August), and Autumn (October) increases in visitors. This trend is consistent over most years with expected outliers occurring occasionally such as in 2009. We expect to see some variation for each year in terms of visitor numbers and there are seasonal trends. The overall pattern doesn’t show an extreme seasonal profile due to the level of repeat visits to the Park and the proximity and accessibility to the Park from the main urban conurbations in the central belt of Scotland.

The figures from the Annual Visitor Volume Model can be compared to other data sources for validation. The latest NatureScot SPANS survey of Scots Resident National Outdoor recreation covers the period April 2023 to March 2024 (dashed line). While it is a national measure and covers urban and rural outdoor engagement, it tracks the seasonal trends observed in the national park model. Also of note is that the 23/24 SPANS report showed that “an estimated 13% of Scots Residents visits included time spent in the Loch Lomond and Trossachs National Park” which aligns with the High Season share estimate of car visitors developed from the model.

Comparison to other data sources, while not directly analogous does provide validation for visitor trends produced from the model

National Park Visitors by Month / Scotland's People and Nature Survey (SPANS) Survey



Source SPANS Data: <https://www.nature.scot/doc/naturescot-research-report-1361-spans-scotlands-people-and-nature-survey-202324-outdoor-recreation>

Comparative Figures Seasonal – STEAM Reports



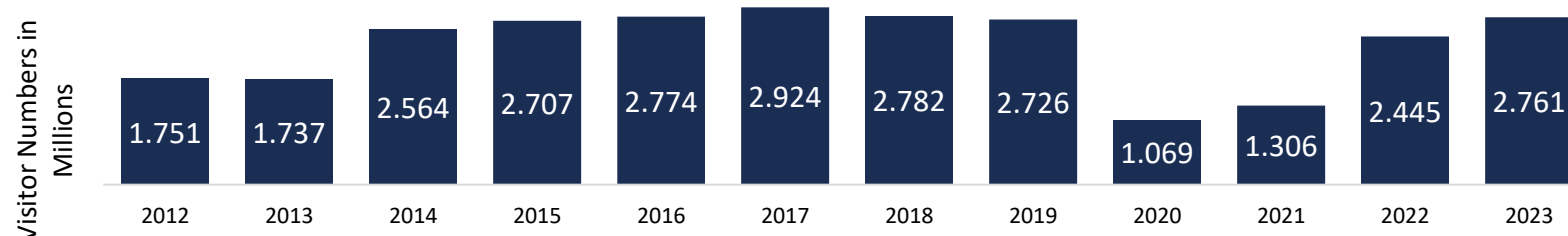
STEAM is a tourism economic impact modelling process which approaches the measurement of tourism from the bottom up, through the use of local supply-side data and tourism performance and visitor survey data collection.

STEAM quantifies the local economic impact of tourism, from both staying and day visitors, through analysis and use of a variety of inputs including visitor attraction numbers, tourist accommodation bed stock, events attendance, occupancy levels, accommodation tariffs, macroeconomic factors, visitor expenditure levels, transport use levels and tourism-specific economic multipliers.

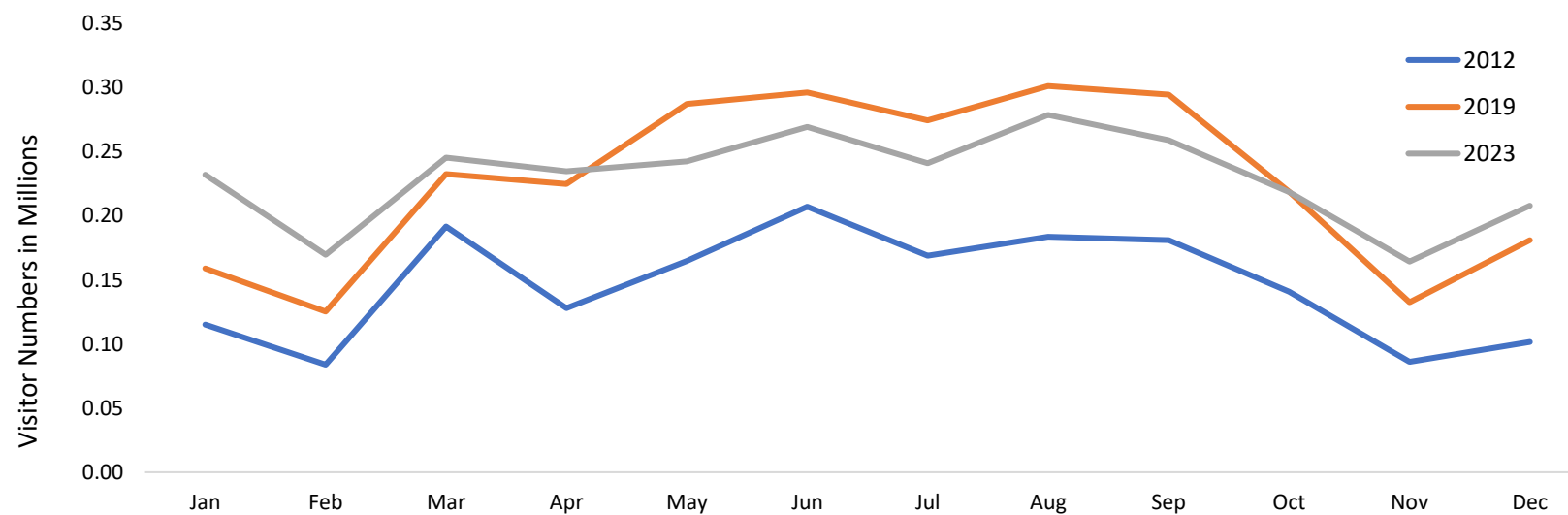
It is noted that the difference in values between STEAM and this study could be related to STEAM recording economic transactions and underestimating other non-economic activities within the Park. Data sources (see appendix) suggested that half of Park activity is unrecorded outside of economic transactions therefore applying this to STEAM figures would rationalise performance between studies.

NOTE: STEAM is a Commercial Product and subject to copyright and restrictions on publication

Estimated Visitor Numbers to Loch Lomond and Trossachs National Park



National Park Visitors by Month from STEAM



Comparative Time Series Figures – Domestic Tourism to Scotland

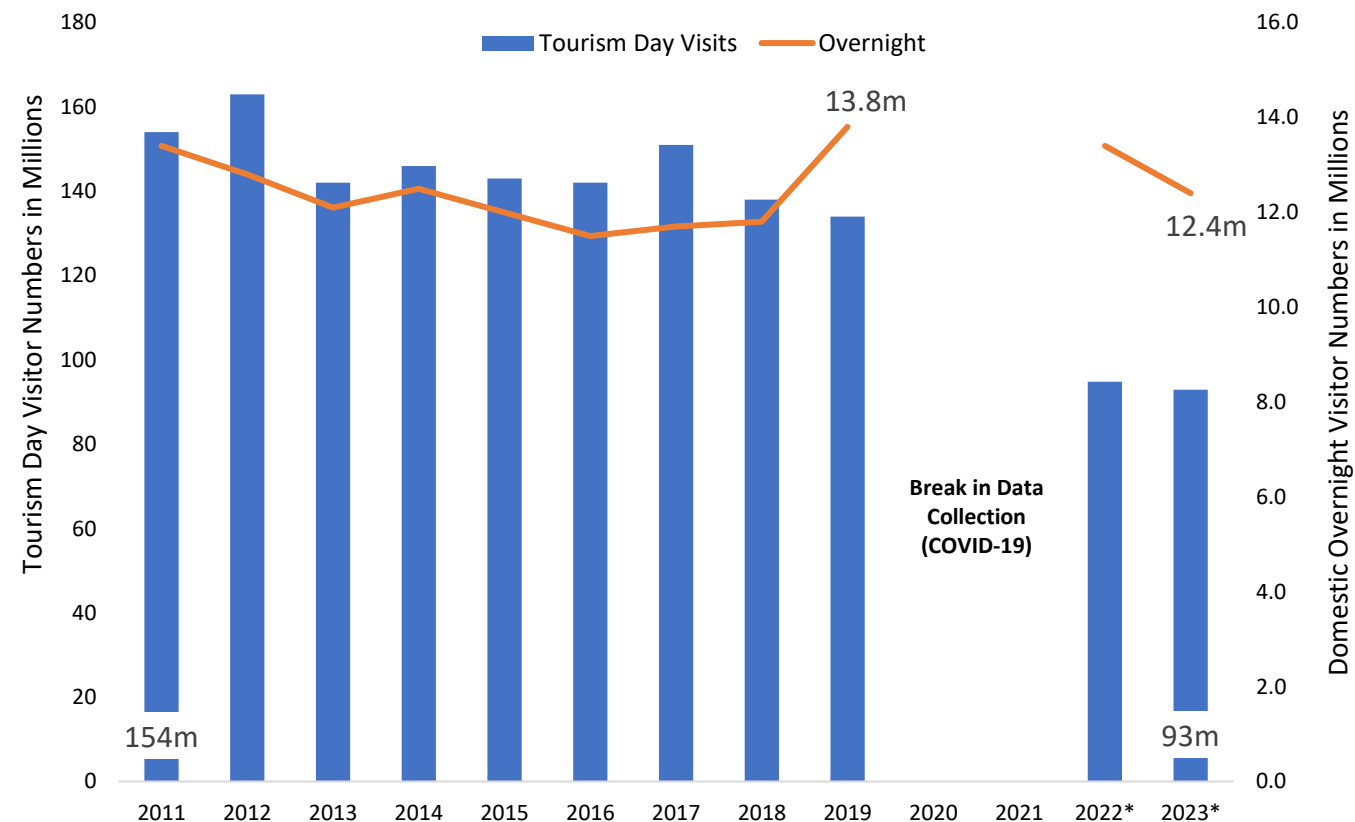


The Great Britain Tourism and Day Visitor Survey is the official statistic for day and overnight tourism in Britain and Scotland. It is commissioned and account managed by the National Tourist Boards of Britain, with VisitScotland managing the survey for Scottish output. This is a long-running survey which, up to 2020 was a consistent data collection methodology. In 2020 a change in methodology resulted in a break in series, exacerbated by the Covid-19 pandemic resulting in pre/post-2020 data being incompatible.

The trend in data shows from 2011 (the first year of day visit data collection) is that day visitor data, along with 2012 was strong in Scotland. Data from 2013 onwards was more consistent. This peak in day visitor activity was partly a result of the consumer economic climate at the time and more domestic and less overseas travel for Scottish and UK residents. As the economy recovered to 2019, more outbound overseas travel grew. Conversely, Scotland has seen growing international inbound from 2011 to the present. A similar theme is seen for overnight domestic visitors in Scotland with a peak in 2011 of 13.4 million overnight trips to Scotland from GB Residents declining through to 2018 where it grows to 13.8 million overnight trips in 2019.

When looking at the output from the model developed for our study of LL&TNP we see an increase in visits to the Park in 2011. This is in line with the broader trends in tourism witnessed at that time with growing consumer activity in domestic day trips of which the National Park would be a beneficiary.

Domestic Tourism Day and Overnight Visitors to Scotland



*New Methodology for Surveys adopted. No comparability between pre/post-2020. Provided for Trending movement in visitor activity
Source: Great Britain Tourism Survey / Great Britain Day Visitor Survey

Visitor Attraction Numbers



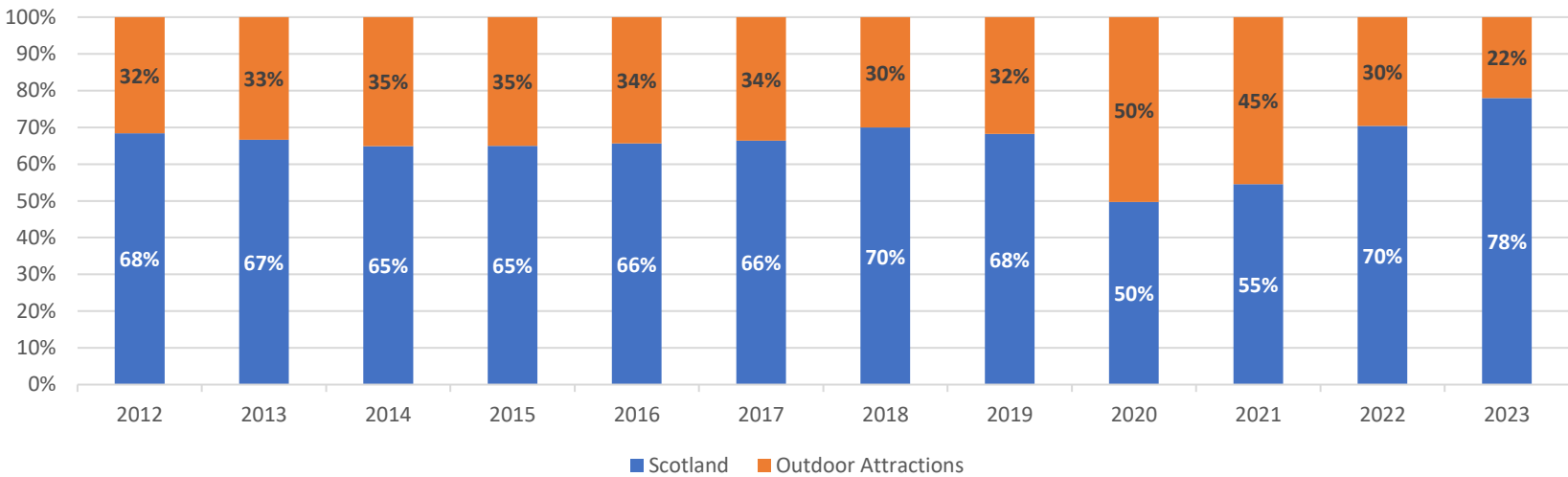
Visitors to visitor attractions are another data source on consumer behaviour which can validate the Park Visitor Volume Model.

From 2012 to 2019 there is a consistent share of visitors to outdoor and nature attractions in Scotland of 30% to 35% of all Scottish visitor attractions. During the Covid-19 pandemic from 2020 to 2021, there was a dramatic decrease in overall visitor numbers due to closures and lockdown restrictions. However outdoor and nature attractions increased the share of the smaller volume of Scottish Attraction visitors attendance to 45% to 50% of all attraction attendees.

Following the lifting of restrictions on tourism from 2022 onwards we have seen a recovery of overall visitor attraction attendance with a return to a pre-pandemic share of visits to outdoor and nature attractions.

This is an example of changing consumer behaviour to external factors and will be an influence on visitor numbers to the National Park.

Share of Visitors to Outdoor / Nature Visitor Attractions against all Visitor Attractions



Visitor Numbers to Attractions in Scotland, Loch Lomond and Scottish Outdoor Nature Attractions

	Sample	2019	2020	2021	2022	2023	% Change Year on Year				% Change 2019 - 2023
							2020	2021	2022	2023	
SCOTLAND	626	53,930,028	18,522,405	26,800,653	44,262,548	52,015,960	-65.7%	44.7%	65.2%	17.5%	-3.5%
OUTDOOR/NATURE ATTRACTIONS	54	9,659,588	7,715,751	10,434,159	9,967,692	10,788,292	-20.1%	35.2%	-4.5%	8.2%	11.7%
LOCH LOMOND	6	1,340,268	740,960	1,060,772	1,248,847	1,277,306	-44.7%	43.2%	17.7%	2.3%	-4.7%

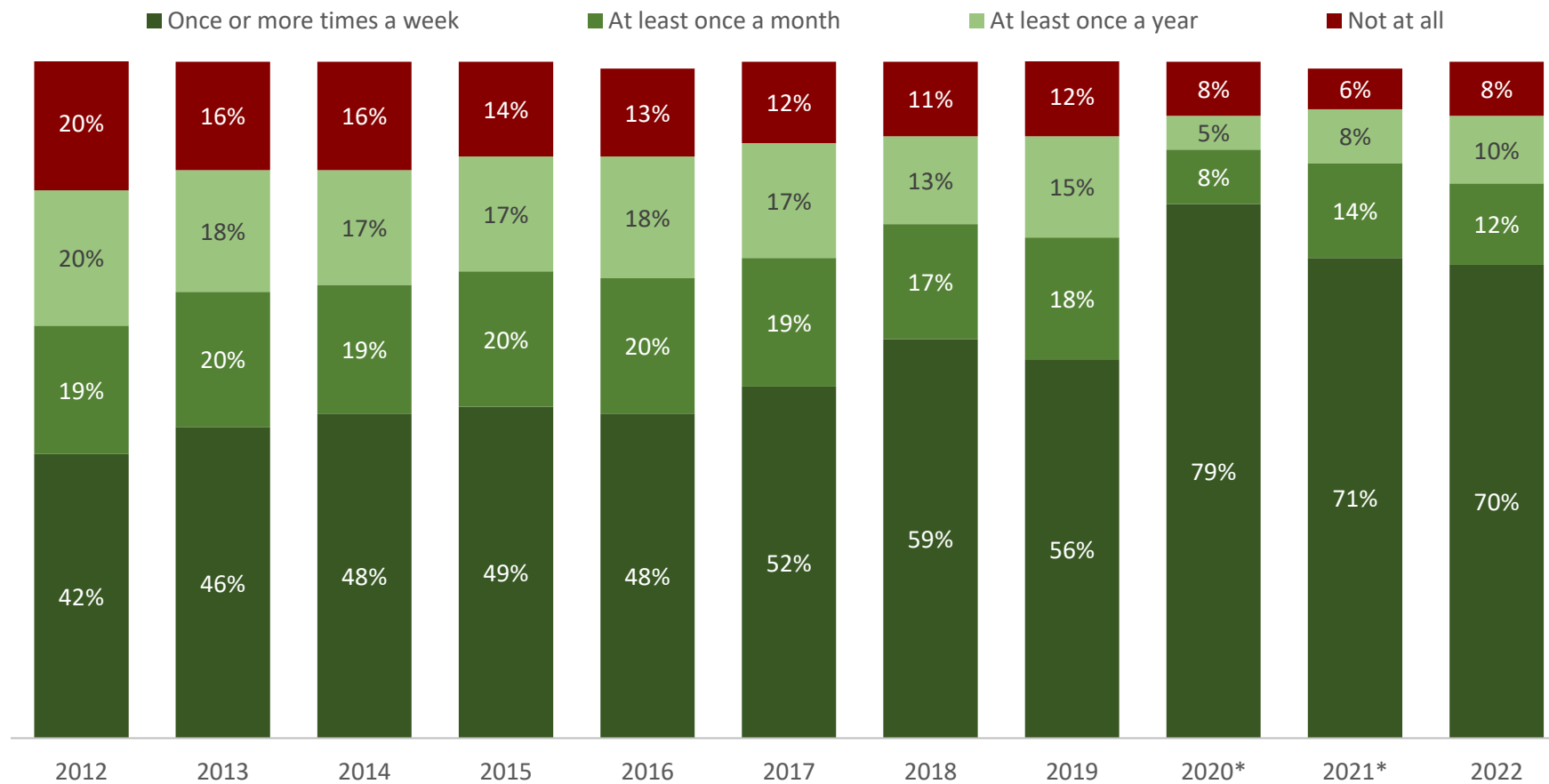
Source: Moffat Centre for Travel and Tourism Business Development Visitor Attraction Monitor

Frequency of visits made to the outdoors (Scotland) Scottish Household Survey

Since 1999, the Scottish Household Survey collects and provides information about Scottish households. It provides up-to-date, comparable information on Scottish household's attitudes and behaviours at local authority and national levels.

When asked the question "What is the frequency of visits made to the outdoors" around half, increasing annually to 56% in 2019 visited once or more times a week. A declining number of the population from 2012 to 2020 (a fifth to approximately a tenth) never visited the outdoors. As an intention for engaging with the outdoors and therefore potentially attending the National Park, the household survey shows that interest in the outdoors has grown over time.

Similar levels of engagement were seen in the Nature Scot Report (No 1227) Scotland's People and Nature Survey finding overall visit levels reported have increased slightly since 2012, and participation in weekly visits has increased more sharply, with the proportion of adults indicating that they visit at least weekly up from 42% in 2012 to 63% in the 2019/20 report.



* Refer to Notes and Appendix for Methodology note

Base = 9410 - 9920 Respondents to Scottish Household Survey (Min – Max Varies per year)

Summary and Conclusion



Measuring annual visitor numbers to Loch Lomond and Trossachs National Park is a challenging exercise. There are multiple points of entry and individuals travelling in the Park may be transiting to other locations rather than stopping and visiting.

The approach taken in this study has been to examine the profile of visitors to the Park over a set period and to gather reliable indicators of visitor activity within the Park published robustly and reliably.

A visitor survey was undertaken over 12 months asking visitors about aspects of their trip such as how they got there, repeat visitation and activities. It was determined from the visitor survey that transport was the main variable that is common across all visitors regardless of their activity or duration of stay in the Park. Car was the main form of transport with around 70% of visitors arriving via this method.

Having transport as the basis of the model, transport counters were identified at key entry points to the Park and the number of vehicles entering and leaving per year was obtained. Using the visitor survey the average car occupancy was applied along with the remaining 30% visitor number who would arrive by other means than car.

This provided an annual visitor number for 2023 of 4.5 million visitors. Comparison with other monitors shows that this number exceeds those, it is within the expectations of the previous in-depth measure of the National Park attendance (from 2009) and follows similar patterns of attendance in terms of the trend of those studies, insights, and measures as follows.

Measures for visitation to the National Park over the years have varied from:

- 2009 Valuing the Park Publication ~ 4 million visitors
- 2019 GBTS = 425,000 Domestic Overnight Visitors (Trips)
- 2019 IPS = 25,000 International Inbound Visitors
- 2023 STEAM Report = 2.8 million visitors

Furthermore, looking at recent consumer surveys the results are comparative to the visitor survey undertaken for this study. Participation surveys from the Scottish Household Survey and NatureScot show that participation in the outdoors as a share of households has increased over the past 10 to 15 years with more people taking multiple trips to the outdoors than previously.

The methodology was developed to estimate visitor numbers which will be repeatable in the future. It is based on an assumption that visitor behaviour will remain consistent for a minimum of five years. As part of the measurement process, there is a stage where one-off events may skew results and this should be recorded and considered when interpreting the results. Also if there is an observed gradual shift away from car travel to other modes such as active or public transport this can be incorporated into the method with the application of any future reliable monitors with minimal alteration to the model.

Recommendations for the future development of the model include:

- Adoption of new data-gathering sources as they become available. For example, as new trail counters or active travel monitors are installed they can be incorporated into the model.
- Acquisition of data from tourism providers. Coach tour operators and public transport providers will be valuable data sources for incorporating into the model. Obtaining these sources will improve the accuracy to the information already received.
- Recording exceptional events to help interpret trends. This may include weather phenomena or major sports/cultural events.

Appendix, Notes and Visitor Survey Questionnaire



Note on the technical methodology behind the Valuing the Park publication (2011):

Technical Supplement Publication Citation: Gibson, Hervey & Riddington, G.. (2011). Valuing the National Park: Loch Lomond and the Trossachs National Park. 10.13140/RG.2.1.3637.6723.

Taken from the Technical report that was produced alongside the “Valuing the National Park” publication from 2011 the paper stated that Loch Lomond and the Trossachs National Park generate an estimated value of £866m per year, of which only about half goes through the market. In other words, the National Park generates as much value that is not recorded in conventional systems as that which is. The extra comprises public enjoyment of the natural assets and resources, values in excess of what consumers actually pay, and ecosystem services rendered to the world at large.

https://www.researchgate.net/publication/299599287_Valuing_the_National_Park_Loch_Lomond_and_the_Trossachs_National_Park

Note on Methodology Change to Scottish Household Survey 2020 / 2021:

Due to the coronavirus (COVID-19) pandemic, all face-to-face interviews for the Scottish Household Survey were suspended and replaced with telephone/ video interviewing for both the 2020 survey and the 2021 survey. Consequently, the results from 2020 and 2021 are not directly comparable to SHS results from previous years. Comparisons can be drawn between results from 2020 and results from 2021, however, some differences may be due to seasonal effects, as the 2020 data was collected in October 2020 and January-March of 2021, while the 2021 data was collected over the course of a whole year, between April 2021 and March 2022. The change in methodology has also required a change to the weighting methodology from previous years. Further information on the changes is in the 'Scottish Household Survey 2020: Methodology and Impact of Change in Mode' report and the 'Scottish Household Survey 2021: Methodology and Fieldwork Outcomes' report, available from the Scottish Household Survey publications webpage.

<https://www.gov.scot/collections/scottish-household-survey/>

Note on the methodology of the Scottish Domestic Tourism Monitors:

The Great Britain Tourism Survey (GBTS) is a national consumer survey. It measures the volume and value of domestic overnight tourism trips taken by residents of Great Britain. Data is gathered via an online survey. Results are weighted to provide a nationally representative estimation of overnight tourism volume and value. Further detail on methodology can be found in the latest background and quality report to download on this page.

In 2019, the producers of the domestic tourist statistics undertook a review of the requirements and methods for producing the statistics. This was to help future-proof the data collection methods. Results published from April 2021 onwards are not directly comparable with data published for 2019 and previous years because:

- statistics from 2021 onwards are based on a new combined survey
- changes in survey methodology were introduced in 2021, together with the interruption in data collection due to coronavirus (COVID-19)

https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-insights/domestic-tourism-statistics-statement-on-methodological-review_updated-september-2024.pdf

Appendix, Notes and Visitor Survey Questionnaire



Explainer: Markov Chain Analysis Method

A Markov chain is a mathematical model that describes a sequence of random events where the probability of the next event depends only on the current state. In simpler terms, the "future" of the system depends only on the present, not the past. Markov analysis is a method used to forecast the value of a variable whose predicted value is influenced only by its current state, and not by any prior activity. In essence, it predicts a random variable based solely on the current circumstances surrounding the variable.

Markov analysis is often used for predicting behaviours and decisions within large groups of people. It was named after Russian mathematician Andrei Andreyevich Markov, who pioneered the study of stochastic processes which is a random probability distribution or pattern that may be analysed statistically but may not be predicted precisely.

The Markov analysis process involves defining the likelihood of a future action, given the current state of a variable. Once the probabilities of future actions at each state are determined, a decision tree can be drawn, and the likelihood of a result can be calculated. The primary benefits of Markov analysis are simplicity and out-of-sample forecasting accuracy. Simple models, such as those used for Markov analysis, are often better at making predictions than more complicated models. Unfortunately, Markov analysis is not very useful for explaining events, and it cannot be the true model of the underlying situation in most cases. Yes, it is relatively easy to estimate conditional probabilities based on the current state. However, that often tells one little about why something happened. Therefore we use other validating data sets to ensure the outputs of any model are reasonable and accurate.

Visitor Survey Questionnaire



Loch Lomond & The Trossachs National Park - Visitor Numbers

LL&TNP F2F Survey Questions

Hello, my name is, from the Moffat Centre, a tourism research organisation. We are conducting some market research on behalf of Loch Lomond and Trossachs National Park to determine the profiles of park users. The reason for our research is the Park Authority requires an accurate measure of visitor numbers to support their planning and policy decisions for the future.

Would you be able to spare a few minutes to answer some questions? This should take no more than five minutes to complete and all of your responses will be treated with the strictest confidence, and only be reported in combination with the answers of other visitors. Your participation will contribute to our understanding of this significant national asset.

REASSURANCE STATEMENT IF NECESSARY: The Moffat Centre is part of Glasgow Caledonian University and an independent tourism research consultancy. We are not selling or promoting anything. Any information gathered is processed securely and in accordance with the Data Protection Act and following the Market Research Society Code of Conduct.

There are 28 questions in this survey.

Location

Moffat Representative to complete

Location survey taking place

● Choose one of the following answers
Please choose **only one** of the following:

- ☐ Aberfoyle
- ☐ Ardentenny Beach
- ☐ Ardgartan
- ☐ Ardlui
- ☐ Arrochar/Succoth
- ☐ Balloch Loch Lomond Shores
- ☐ Balloch Other
- ☐ Balmaha
- ☐ Balguthidder
- ☐ Ben A'an car park
- ☐ Ben Ledi car park
- ☐ Ben Venue car park
- ☐ Bochastle
- ☐ Bracklinn Falls Car Park
- ☐ Callander
- ☐ Cashel
- ☐ Crianlarich/Crianlarich Train Station
- ☐ Dryman
- ☐ Duncan Mills Memorial Slipway
- ☐ Falls of Falloch
- ☐ Firkin Point
- ☐ Gartmore
- ☐ Glen Finglas - Lendrick Hill
- ☐ Inveruglas
- ☐ Jubilee Point, Loch Eck
- ☐ Killin
- ☐ Lochearnhead
- ☐ Lochgoilhead

- ☐ Loch Lubhair
- ☐ Loch Katrine/Trossachs Pier
- ☐ Loch Lubnaig (South)
- ☐ Loch Lubnaig (The Cabin at Loch Lubnaig)
- ☐ Loch Venachar North
- ☐ Loch Venachar South
- ☐ Luss
- ☐ Luss South
- ☐ Milarrochy Bay
- ☐ Milton, Loch Ard
- ☐ Rowardennan
- ☐ St Fillans
- ☐ Tarbet
- ☐ The Lodge Visitor Centre
- ☐ Three Lochs Forest Drive
- ☐ Tyndrum
- ☐ Port of Menteith
- ☐ Sallochys Campsite/West Highland Way

Weather conditions

● Check all that apply
Please choose **all** that apply:

- ☐ Sunny
- ☐ Cloudy
- ☐ Partly Cloudy
- ☐ Raining
- ☐ Snowing
- ☐ Sleet
- ☐ Foggy
- ☐ Windy

This is a question help text.

Visitor Survey Questionnaire



About You

1. Firstly, may I check if you are a permanent resident living within the park, or just visiting?

● Choose one of the following answers

Please choose **only one** of the following:

- ☐ Permanent Resident
☐ Visitor

2. Which of the following best describes the main reason for your trip today?

● Choose one of the following answers

Please choose **only one** of the following:

- ☐ Leisure day trip
☐ Holiday or short break involving an overnight stay
☐ Visit to see friends or relatives for leisure
☐ Another type of trip taken for leisure purposes
☐ School / College / University Group Trip
☐ Business Trip*
☐ Other

*If a Business Trip. Thank the participant and close the survey.

2a. If Other, please specify

Only answer this question if the following conditions are met:

Answer was 'Other' at question '[TypeofTrip]' (2. Which of the following best describes the main reason for your trip today?)

Please write your answer here:

3. How long are you staying within Loch Lomond & the Trossachs National Park?

● Choose one of the following answers

Please choose **only one** of the following:

- ☐ Just passing through
☐ Day trip
☐ Part of a longer holiday/visit/overnight stay
☐ Refused to answer

4. How many are in your group?

Adults	
Children	

A child is 16 years and under

5. How did you travel to the National Park today:

● Check all that apply

Please choose **all** that apply:

- ☐ Train
☐ Bus (Public Transport)
☐ Coach (Tour Company)
☐ Mini Bus (Tour Company)
☐ Car (owned/hired/friends/firms)
☐ Taxi/Uber/Minicab
☐ Motorhome/Campervan
☐ Motorcycle
☐ Bicycle
☐ Walked/Hiked
☐ Boat/Ferry
☐ Plane
☐ Other

If Hitch-hiked state the form of transport used

5a. If by Car, what type:

Only answer this question if the following conditions are met:

Answer was at question '[Tpt]' (5. How did you travel to the National Park today:)

● Choose one of the following answers

Please choose **only one** of the following:

- ☐ Petrol/Diesel
☐ Hybrid
☐ Plug in Hybrid
☐ Electric

Visitor Survey Questionnaire



5b. If by bike, was it an electric one?

Only answer this question if the following conditions are met:

Answer was at question '[Tpt]' (5. How did you travel to the National Park today:)

Please choose **only one** of the following:

- ☐ Yes
☐ No

5c. If Other, please specify

Only answer this question if the following conditions are met:

Answer was at question '[Tpt]' (5. How did you travel to the National Park today:)

Please write your answer here:

6. How often do you visit Loch Lomond & the Trossachs National Park?

Choose one of the following answers

Please choose **only one** of the following:

- ☐ First Visit
☐ Every Day
☐ 1-6 times a week
☐ Once a Fortnight
☐ Once a Month
☐ Once every 3 Months
☐ Once every 6 Months
☐ Once a Year
☐ Less than Once a Year
☐ Don't Know

7. Which of these activities have/will you and your group take part in during time in the National Park area?

Check all that apply

Please choose **all** that apply:

- ☐ Climbing/mountaineering
☐ Walking – multi-day
☐ Walking – high level
☐ Walking – low level
☐ Golf
☐ Camping/Wild Camping
☐ Picnic/BBQ
☐ Motorised watersports
☐ Non-motorised watersports
☐ Fishing
☐ Paid outdoor adventure activities
☐ Wildlife/Bird watching
☐ Driving
☐ Road cycling/mountain biking
☐ Photography
☐ Shopping
☐ Visiting Attractions/Historic sites
☐ Eating out / Local Food & Drink
☐ Organised group trip/guided tour
☐ Visiting towns/villages in the area
☐ Attending Events/Festivals/Performances
☐ General sightseeing / relaxing
☐ Other

7a. If Other, please specify

Only answer this question if the following conditions are met:

Answer was at question '[G02Q16]' (7. Which of these activities have/will you and your group take part in during time in the National Park area?)

Please write your answer here:

8. Are you staying overnight in the National Park?

Please choose **only one** of the following:

- ☐ Yes
☐ No

Visitor Survey Questionnaire



8a. If yes, what type of accommodation are you staying in within the park during your trip?

Only answer this question if the following conditions are met:

Answer was 'Yes' at question ' [Accm]' (8. Are you staying overnight in the National Park?)

❶ Check all that apply

Please choose **all** that apply:

- ☐ Hotel
- ☐ B&B/Guest House
- ☐ Self-Catering/Airbnb
- ☐ Hostel
- ☐ Camping at Campsite
- ☐ Caravan/Motorhome at Campsite
- ☐ Camping – Wild Camping
- ☐ Caravan/Motorhome – Wild Camping
- ☐ Bothy
- ☐ Second Home
- ☐ Staying with Friends and Family
- ☐ Normal place of residence/own home
- ☐ Other

8b. If Other, please specify

Only answer this question if the following conditions are met:

Answer was at question ' [AccmType]' (8a. If yes, what type of accommodation are you staying in within the park during your trip?)

Please write your answer here:

9. How many nights are you staying in the park?

Only answer this question if the following conditions are met:

Answer was 'Yes' at question ' [Accm]' (8. Are you staying overnight in the National Park?)

❶ Only numbers may be entered in this field.

Please write your answer here:

If a park resident enter 365

10. How likely are you to visit the National Park area again?

❶ Choose one of the following answers

Please choose **only one** of the following:

- ☐ Very Likely
- ☐ Fairly Likely
- ☐ Not Likely
- ☐ Very Unlikely

11. Where is your place of residence?

❶ Choose one of the following answers

Please choose **only one** of the following:

- ☐ Scotland
- ☐ England
- ☐ Northern Ireland
- ☐ Wales
- ☐ Overseas/International

Usual place of residence

11a. In which Local Authority is your place of Residence?

Only answer this question if the following conditions are met:

Answer was 'Scotland' at question ' [Residence]' (11. Where is your place of residence?)

❶ Choose one of the following answers

Please choose **only one** of the following:

- ☐ Aberdeen City
- ☐ Aberdeenshire
- ☐ Angus
- ☐ Argyll & Bute
- ☐ Clackmannanshire
- ☐ Dumfries & Galloway
- ☐ Dundee City
- ☐ East Ayrshire
- ☐ East Dunbartonshire
- ☐ East Lothian
- ☐ East Renfrewshire
- ☐ Edinburgh, City of
- ☐ Eilean Siar
- ☐ Falkirk
- ☐ Fife
- ☐ Glasgow City
- ☐ Highland
- ☐ Inverclyde
- ☐ Midlothian
- ☐ Moray
- ☐ North Ayrshire
- ☐ North Lanarkshire
- ☐ Orkney Islands
- ☐ Perth & Kinross
- ☐ Renfrewshire
- ☐ Scottish Borders
- ☐ Shetland Islands
- ☐ South Ayrshire
- ☐ South Lanarkshire
- ☐ Stirling
- ☐ West Dunbartonshire
- ☐ West Lothian
- ☐ Refused to answer

11b. If from the UK, what is your postcode?

Only answer this question if the following conditions are met:

Answer was NOT 'Overseas/International' at question ' [Residence]' (11. Where is your place of residence?)

Please write your answer here:

11c. If Overseas, please state which country:

Only answer this question if the following conditions are met:

Answer was 'Overseas/International' at question ' [Residence]' (11. Where is your place of residence?)

Please write your answer here:

12. If an International inbound visitor, which port of entry did you arrive at?

● Choose one of the following answers

Please choose **only one** of the following:

- ☐ Edinburgh Airport
- ☐ Glasgow Airport
- ☐ Glasgow Prestwick Airport
- ☐ Inverness Airport
- ☐ Aberdeen Airport
- ☐ Other Airport in Scotland
- ☐ Airport outside of Scotland but in Rest of UK (e.g. in England / Wales)
- ☐ Eurotunnel
- ☐ Ferry Port outside of Scotland but in Rest of UK
- ☐ Ferry Port within Scotland

12a. If Other Airport within Scotland, please specify

Only answer this question if the following conditions are met:

Answer was 'Other Airport in Scotland' at question ' [PortofEntry]' (12. If an International inbound visitor, which port of entry did you arrive at?)

Please write your answer here:

13. Which of the following best describes who was with you on your trip?

● Check all that apply

Please choose **all** that apply:

- ☐ I'm on my own
- ☐ Your Spouse/Partner
- ☐ Your child/children
- ☐ Your grandchild/grandchildren
- ☐ Your parent(s) and/or your partners parent(s)
- ☐ Other members of your family
- ☐ Friends
- ☐ An organised group
- ☐ Someone else

13a. If Someone else, please specify

Only answer this question if the following conditions are met:

Answer was at question ' [Group]' (13. Which of the following best describes who was with you on your trip?)

Please write your answer here:

14. One last question, if you are agreeable we would like to email you a follow-up online survey asking about your experiences in the park during your stay. Please be assured that your answers today and in this survey are completely anonymous and your individual responses will be held securely and would never be shared with third parties.

If you are happy to receive the follow-up survey may we have your email address?

Please write your answer here:

Thank you, that concludes our survey. We very much appreciate your time contributing to this important study, on behalf of the National Park.

Thank you, that concludes our survey. We very much appreciate your time contributing to this important study, on behalf of the National Park.

05-31-2024 – 08:56

Submit your survey.

Thank you for completing this survey.

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Loch Lomond and The Trossachs National Park Annual Visitor Number Study

March 2025

Draft Visitor Survey Results Report from
The Moffat Centre for Travel and Tourism, Glasgow Caledonian University

3rd March 2025
REF: GSBS22-002
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