



LOCH LOMOND & THE TROSSACHS NATIONAL PARK

2025 ANNUAL PARK VISITOR ESTIMATES LOCH LOMOND AND THE TROSSACHS NATIONAL PARK

APRIL 2026

Contents

Contents	2
Executive Summary.....	2
Year in Review.....	2
Annual Visitor Number Estimates	3

Executive Summary

The year 2025 for the National Park, marked by record-breaking climate conditions and a definitive shift in the planning landscape. There was a transition from a post-pandemic "volume" model to a "value" model, where the focus shifted toward infrastructure resilience and higher-spending, lower-impact visitors.

Year in Review

1. Weather & Environmental Climate

2025 was officially crowned the sunniest year on record for the UK, and one of the warmest. The dry March and warm summer months saw a 12% surge in "Water Wellness" activities. Wild swimming, paddleboarding, and the new outdoor sauna installations at Luss and Balmaha became primary revenue drivers.

Conversely, the year began with Storm Éowyn in January, which brought 90mph+ gusts. This underscored the necessity of the 2025 infrastructure investments, particularly the completed upgrades to the Luss Pier and the Tarbet visitor hub, which now provide better climate-sheltered facilities.

2. Consumer Behaviour: The "Transformation Economy"

In 2025, three distinct shifts were observed in how visitors engaged with the Park.

Wellness - visitors moved away from "peak-bagging" (rushing to finish Munros) toward slow-paced wellness retreats.

Social Fitness, with events like the GO SWIM event and the new Loch Lomond Unplugged (launched May 2025) targeted the "athleisure" traveller who travels for a specific hobby rather than general sightseeing.

Set-Jetting Plus – Visitors inspired by 2024-2025 filming (e.g., *The Traitors* and *Outlander*) will have been inspired to increase the cultural heritage tourism particularly on the West Side of the Loch. The Loch Lomond & The Trossachs National Park Authority's 2025 Season Review specifically

noted that despite a 10% dip in general camping/boat launches due to early-season weather, pre-booked cultural activities remained resilient.

3. Key Events of 2025

Event	Impact	Insight
Springfest / Summerfest	Record attendance in Balloch.	High volume, but increased pressure on rail/bus links.
Loch Lomond Unplugged	New for 2025; showcased local talent.	Shifted the demographic toward younger, "culturally curious" visitors.
Classic Car Show	Debuted in June 2025.	High-spend demographic; utilized secondary road networks effectively.
Easter 2025	18 th April – 20 th April. A late Easter, compared to 2024 which occurred at the end of March	As the traditional “start” to the tourism season, the late Easter provides the chance of better weather, but a shorter trading period for seasonal tourism businesses.

4. Legislative Shifts & 2026 Impacts

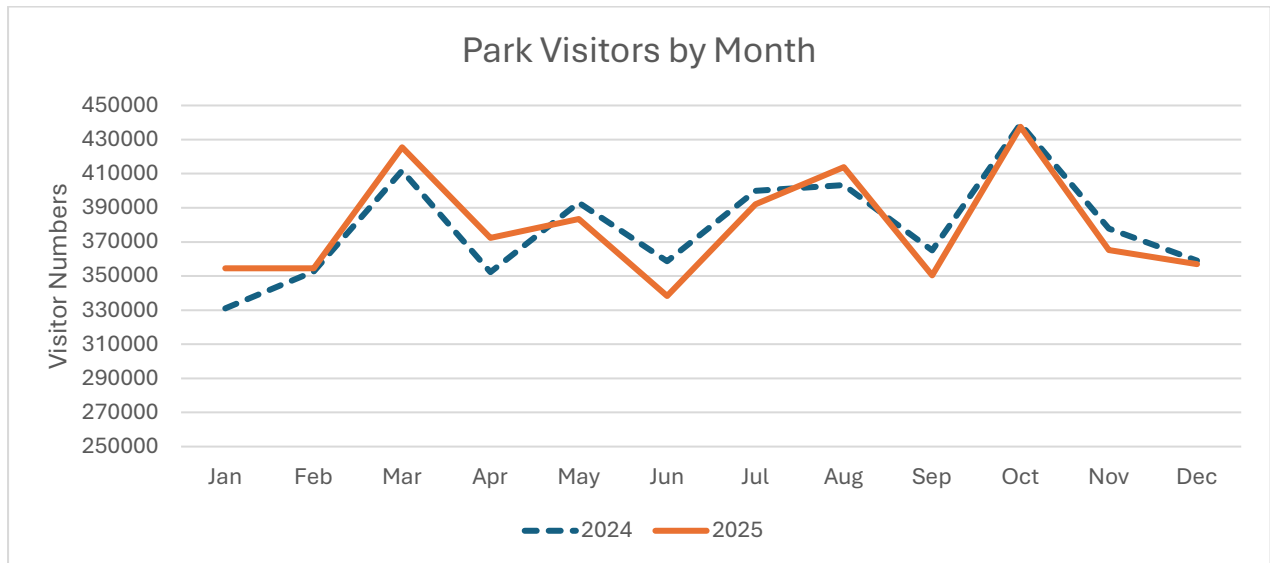
2025 witnessed the impact of two major legislative impacts on tourism within the Park. The Visitor Levy (Scotland) Amendment Act had throughout 2025, local councils (Stirling, Argyll & Bute, and West Dunbartonshire) prepared for the Visitor Levy. Short-Term Let (STL) Licensing saw the full enforcement of STL licensing in 2025. This led to a possible 6% contraction in informal bedspaces but a 9% increase in professional hotel occupancy, which could stabilise the local job market by reducing the seasonality of employment.

Annual Visitor Number Estimates

Based on the Visitor Estimate Model developed for the Park, there were 4.5 million park visitors in 2025. This is comparable to numbers seen in 2024 and +1.13% higher than visitors recorded in 2019.

Year	2019	2023	2024	2025	Diff 24/25
Arrivals by Car	3,467,348	3,456,135	3,495,161	3,495,617	456
Arrivals (Other)	1,040,204	1,036,841	1,048,548	1,048,685	137
Total Visitors	4,507,552	4,492,976	4,543,709	4,544,302	593

Seasonality



The chart shows the comparison of monthly visitor arrivals to the Park during 2024 and 2025.

While both years show a similar trend in annual performance, the March/April and Summer periods show that 2025 visitors peaked above 2024. It is noted that the start of Quarter 4 (October) was comparable for both years and represented the highest number of monthly visitors, perhaps aligning with the Autumn School Break.

Visitors Arriving via Non-Car Methods

Visitors to the Park that arrive by non-Car methods represent 27% to 30% of the total. The following show available data for passenger performance figures for Train and Public Bus travel to the Park. While representative of shifts in behaviour rather than absolute figures for visitor numbers they provide some insight into travel behaviours. From the 2019/20 National Park Visitor Survey undertaken by Progressive and the 2024 Moffat Centre Visitor Survey, comparable results show that 3% of Park Visitors arrive by Public Scheduled Bus and 3% arrive by Train. Figures from the Office for Rail Regulation and Stirling Council show that across the main train stations within the Park and for Bus travel there is an increase in passengers. This may translate to a shift in behaviour during 2025.

(For reference, 7% of Park Visitors arrive by Private Bus or Tour Operator Coach).

Train Passenger Numbers (Entry/Exit) (Period Apr – Mar)

Train Station	2019/20	2023/24	2024/25
Balloch	487,734	430,574	444,334
Arrochar & Tarbet	18,288	21,686	20,438
Ardlui	3,982	4,118	4,050
Crianlarich	14,250	16,108	16,156
Upper Tyndrum	4,736	5,878	5,760
Lower Tyndrum	5,128	6,382	5,986

Source: Office of the Rail Regulator

Bus Usage: The Trossachs Explorer was commissioned by the National Park Authority over the past two years, starting in the summer of 2024. The new bus service has proved popular, with a 15% increase in passenger numbers in year two from year one, and it was positively received by local residents and visitors who used it for a wide variety of purposes, from walking and hiking to getting to work and reaching onward connections.

2025 ANNUAL PARK VISITOR ESTIMATES LOCH LOMOND AND THE TROSSACHS NATIONAL PARK

APRIL 2026