



Loch Lomond & The Trossachs National Park Authority
Carrochan
Carrochan Road
Balloch
G83 8EG

Ref: EIR 2026-015 / FOI 2026-019
Date: 20 May 2026

Dear XXX

REQUEST FOR ENVIRONMENTAL INFORMATION

Thank you for your request for access to information held by the National Park Authority, which was received by email on the 21 April 2026. As the information you have requested is environmental information, we have applied the exemption at section 39(2) of the Freedom of Information (Scotland) Act 2002 and considered your request solely under the Environmental Information (Scotland) Regulations 2004.

Your Request

Your asked us to provide you with access to the following information:

- *"...a commissioned report dated May 2011 that is titled Valuing the Loch Lomond and Trossachs National Park."*
- *"Surveys that have been undertaken since 2020 that provide estimates of visitor numbers to the park."*

Our Response

The Authority holds information that falls within the scope of your request. Please find the following documents attached to this response:

- *LLTNPA - Valuing the Park* (July 2011)
- *LLTNPA – Annual Visitor Number Study* (March 2025)
- *LLTNPA – Annual Park Visitor Estimates* (April 2026)
- *'Annual Visitor Number Research Project'* – an update that was presented to the Authority's Board by its Chief Executive, on 15 September 2025.

LOCH LOMOND & THE TROSSACHS NATIONAL PARK AUTHORITY

National Park Headquarters, Carrochan, Carrochan Road, Balloch, G83 8EG Long: 4°34'24"W Lat: 56°00'12"N

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Yours sincerely

Information Management
Loch Lomond and the Trossachs National Park Authority

Review Procedure

If you are dissatisfied with this decision, or the way in which the Authority has dealt with your request, you are entitled to require the Authority to review its decision. Please note that in order for a review to take place you are required to:

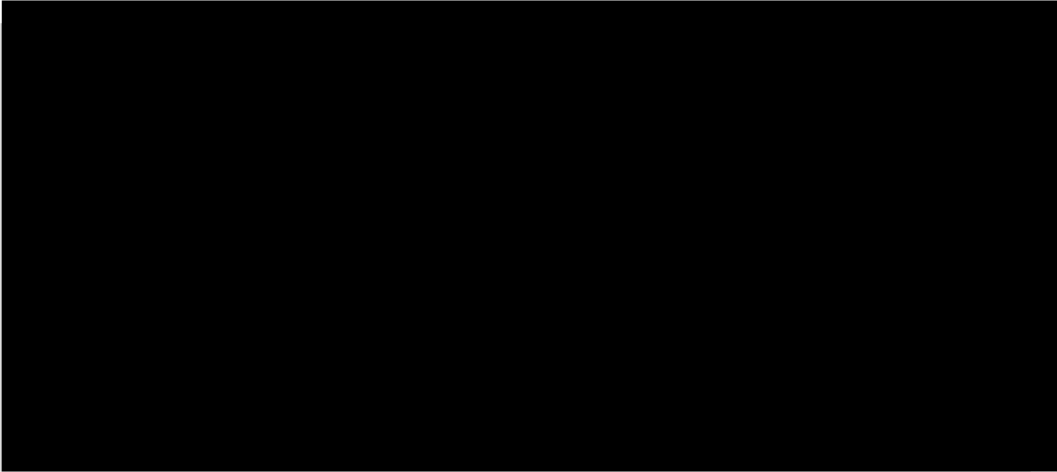
- Send your request for review in writing, setting out in full the reasons why you are requesting a review.
- Submit your review request within 40 working days of either the date on which you received a response from the Authority or the date by which you should have received a response under the terms of the Freedom of Information (Scotland) Act 2002, whichever is the later.
- address your review request to:

Information Manager
Loch Lomond & The Trossachs National Park Authority
National Park Headquarters
Carrochan
Carrochan Road
Balloch
G83 8EG
E-mail: info@lochlomond-trossachs.org

The review will be handled by staff who were not involved in the original decision. You will receive notice of the result of your review within 20 working days.

If you are not satisfied with the response to your request for review, you can contact the Scottish Information Commissioner, the independent body which oversees the Freedom of Information (Scotland) Act 2002, at:

Scottish Information Commissioner
Kinburn Castle
Doubledykes Road
St Andrews
Fife
KY16 9DS
Tel: 01334 464610
Website: www.itspublicknowledge.info
E-mail: enquiries@itspublicknowledge.info



5. Annual Visitor Number Research Project

- 5.1. As part of our ongoing tourism research and insights programme, a bespoke research project was initiated in 2023 with the aim of determining an updated total annual visitor number to the National Park, via a more robust new methodology which can be replicated year-on-year. A previous study ('Valuing the Park') was undertaken in 2011 providing an estimated annual number of 4 million visitors as part of a wider study into the economic value of tourism and this is the figure Members may well be familiar with. Considering the changes in visitor trends and this figure being based on data from a number of years ago there was a clear need to update on this annual figure.
- 5.2. Determining an overall annual figure is not straightforward given the nature of how visitors access the National Park and how data is collected and by whom. The work to undertake the research was awarded to the Moffat Centre for Travel & Tourism Business Development, based in Glasgow Caledonian University with the following objectives:
- 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
- 5.3. 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. Since November the project Report has been reviewed internally, shared in confidence with a key user group and the new model run for 2024.

Project Outcomes

- The new methodology, with its primary focus on transport data, presents a more inclusive and accurate reflection of visitor activity, addressing past methodological limitations. This methodology and interpretation of the visitor survey results determined that transport to and from the National Park is the principal determinant for identifying visitor numbers. This is based on the premise that all visitors must use a form of transport from mechanised to active travel to enter the Park boundary, both day visitors and overnight. The measures that we obtained that met this premise were reliable, robust and regularly generated including Traffic Counters, Trail Counters, Tour Operator Numbers (Coach based holidays) and Rail Passenger figures to establish the flow of people into and through the Park boundaries. Using this methodology will provide a robust benchmark for future and regular annual visitor number estimations to take place, ultimately providing more comprehensive, multi-year visitor number insight trend analysis.
- This new model determined there were at least 4.54 million visitors to the National Park in 2024.
- This new research data model will be developed further and repeated internally on an annual basis to further strengthen the year-on-year datasets and trend analysis.
- The research project provided a number of secondary findings including data on National Park visitor profiling, demographics, activities, accommodation type, length of stay, etc, derived from extensive visitor survey interviews. The primary research has been validated against secondary resources including 'STEAM' reports, visitor attractions monitor, accommodation occupancy and national visitor monitors such as the International Passenger Survey and the Great Britain Tourism Survey.
- Members may have seen the most recent annual STEAM headlines for 2024 published by some of the local authorities that cover the National Park area. The methodology of this is different as it is an accommodation occupancy approach and is a useful data source on the performance of the visitor economy. The STEAM report for the National Park Authority has been received and is being

reviewed. Its annual findings will inform future outputs of the new model.

Commentary on Visitor Numbers

- The National Park Authority's primary goal is sustainable visitor management rather than visitor growth. Visitor numbers can serve as a partial indicator and informative metric, but they alone do not represent a sole measure of 'success'.
- 5.4. Visitor numbers alone also do not directly equate to spend within the local economy. While some visitors pursue self-sufficient activities with limited direct economic impact, these activities represent opportunities rather than shortcomings as well as the range of ways that visitors access, enjoy and benefit from the National Park.
- 5.5. Although the overall annual volume is broadly in line with pre-pandemic benchmarks, what visitors do once they arrive is shifting. National data show a long-term rise in outdoor recreation participation. In the supporting survey work undertaken, low-level walking, general sightseeing and other outdoor pursuits dominate activity choices. That change means a larger share of the same headline total could now be interacting with National Park Authority -managed outdoor infrastructure and services - paths, car parks, Ranger support, visitor management, etc. In practical terms, pressures on frontline teams can rise even when the aggregate visitor figure remains relatively flat. Resource planning (e.g. Ranger staffing, maintenance budgets) therefore needs to track activity mix and site-level usage, not just the headline count.

Conclusion

- 5.6. Our robust approach to measuring visitor numbers helps inform sustainable management of the National Park, ensuring visitor experiences remain high-quality, accessible, and environmentally responsible. This new model will also be a key data source for the monitoring of the National Park Partnership Plan.
- 5.7. To date, an overview presentation of the research project methodology development and outcomes was presented by the Moffat Centre's lead researcher to the National Park Destination Group of tourism businesses on 15th May. Our key business forum were in broad agreement that the project was a worthwhile exercise that has produced insightful outcomes and a clear measure of annual visitor numbers.
- 5.8. Officers now plan to take forward the final report to share with staff to ensure consistent and accurate use. We will also carefully consider how