

SCOTLAND VISITOR SURVEY 2012

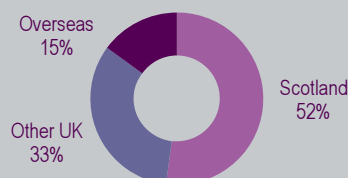
REGIONAL RESULTS: Loch Lomond and the Trossachs National Park



Market overview 2011

Stirling & Forth Valley, Argyll, and Loch Lomond & the Trossachs National Park attracted 1.75 million visitors in 2011, spending £363 million.

15% of visitors are from overseas.



Note: Data in this box and the first bullet point below is sourced from the 2011 GB Tourism Survey and International Passenger Survey and relates to Stirling & Forth Valley, Argyll and Loch Lomond and the Trossachs NP, as more specific data is unavailable. All other results in the factsheet are from the Scotland Visitor Survey and relate to Loch Lomond and the Trossachs NP.

The 2012 Scotland Visitor Survey was conducted for VisitScotland by TNS with fieldwork from July to October. Over this period 1,427 overnight leisure visitors to Scotland were surveyed including 599 visitors to Loch Lomond and the Trossachs National Park. Further factsheets containing results for the other areas included in the 2012 and 2011 surveys are available at www.visitscotland.org.

- The national tourism volume surveys (GB Tourism Survey and International Passenger Survey) recorded 1.75 million tourists visiting Stirling & Forth Valley, Argyll, and Loch Lomond & the Trossachs National Park in 2011. This equates to around 11% of all visits taken to Scotland. 15% of visitors are from overseas with the largest proportions from the USA and Germany.

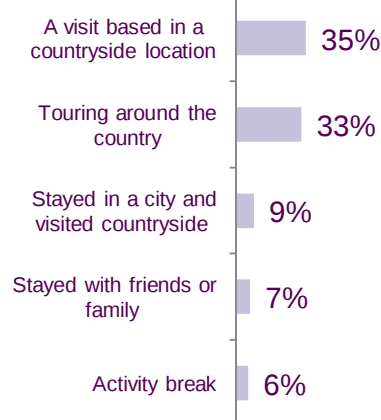
- The following information relates to summer visitors to Loch Lomond and the Trossachs National Park staying overnight in Scotland.

- The age profile of visitors to Loch Lomond and the Trossachs National Park was 18% aged under 35, 41% between 35 and 54 and 41% aged 55 and over.

- Most visitors to Loch Lomond and the Trossachs National Park describe their trip as being based in a countryside location (35%) or as part of a wider visit touring Scotland (33%).

- 45% of visitors to Loch Lomond and the Trossachs National Park spend one or more nights in the area. Amongst these visitors the average length of stay is 3.78 nights. 43% of those who spend any nights in the area stay 1 or 2 nights, 12% stay 3 nights and 37% stay for longer.

Visit type



Average length of stay (summer only)

Loch Lomond & the Trossachs NP
3.78 nights

25% of visitors are on their first ever visit to Scotland

45% of visitors to Loch Lomond and the Trossachs National Park spend one or more nights in the area

The Visitor Experience



Dreaming

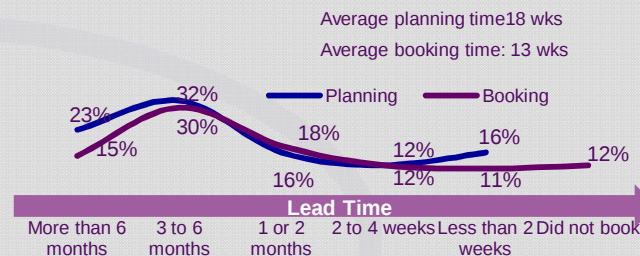
Top reasons for choosing to visit Loch Lomond and the Trossachs

National Park (NP) include a particular interest in the scenery (39%), an area known to the visitor (23%) and to visit a particular attraction (20%). Other reasons included visiting to take part in specific activities (15%), or because of a recommendation to visit (14%).



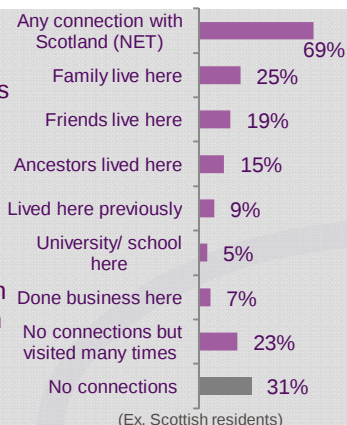
Planning

While 55% of visitors start to plan their visit more than 3 months in advance, 16% start planning less than a fortnight beforehand. 12% of visitors made no bookings before travelling.



Connections to Scotland

69% of Loch Lomond and the Trossachs NP visitors had connections with Scotland, compared to a Scotland average of 72%. Connections were most likely to be through family or friends living in the area, or ancestors who had lived in Scotland.



Travel

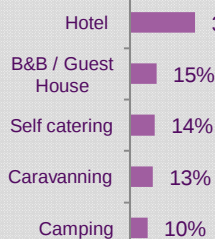
Overall 61% of visitors to Loch Lomond and the Trossachs NP who live outside of Scotland arrived in Scotland by car, although this proportion was higher amongst UK visitors. Overseas visitors were more likely to have arrived by air (50%).

	UK residents	International visitors	All visitors
Car – own or hired	70%	30%	61%
plane	4%	50%	14%
train	5%	3%	4%
boat	2%	5%	3%



Accommodation

37% of visitors to Loch Lomond and the Trossachs NP stayed in a hotel while in the area (13% 4 or 5 star, 22% 3 star, 2% 1 or 2 star). Other visitors stayed in a variety of accommodation including B&B/Guesthouse (15%), Self catering (14%), caravanning (13%) and camping (10%). Overseas visitors were much more likely to have stayed in B&B accommodation (41%).



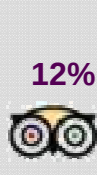
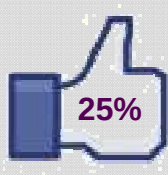
Activities

The most popular activities on visits to Loch Lomond and the Trossachs NP were sightseeing (41%), short walks (40%), long walks (36%) and trying local food (35%). Long walks were more popular amongst overseas visitors (48%).



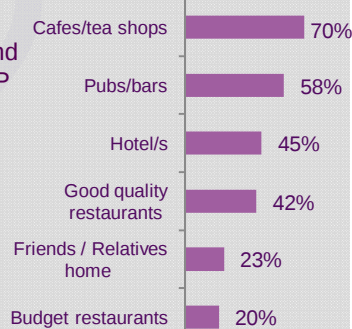
Sharing

44% of visitors to Loch Lomond and the Trossachs NP shared their experiences online after they returned home with 32% uploading photos (e.g. to flickr) and 25% updating their Facebook status regarding their trip. 12% left reviews on a website such as Tripadvisor.



Eating out

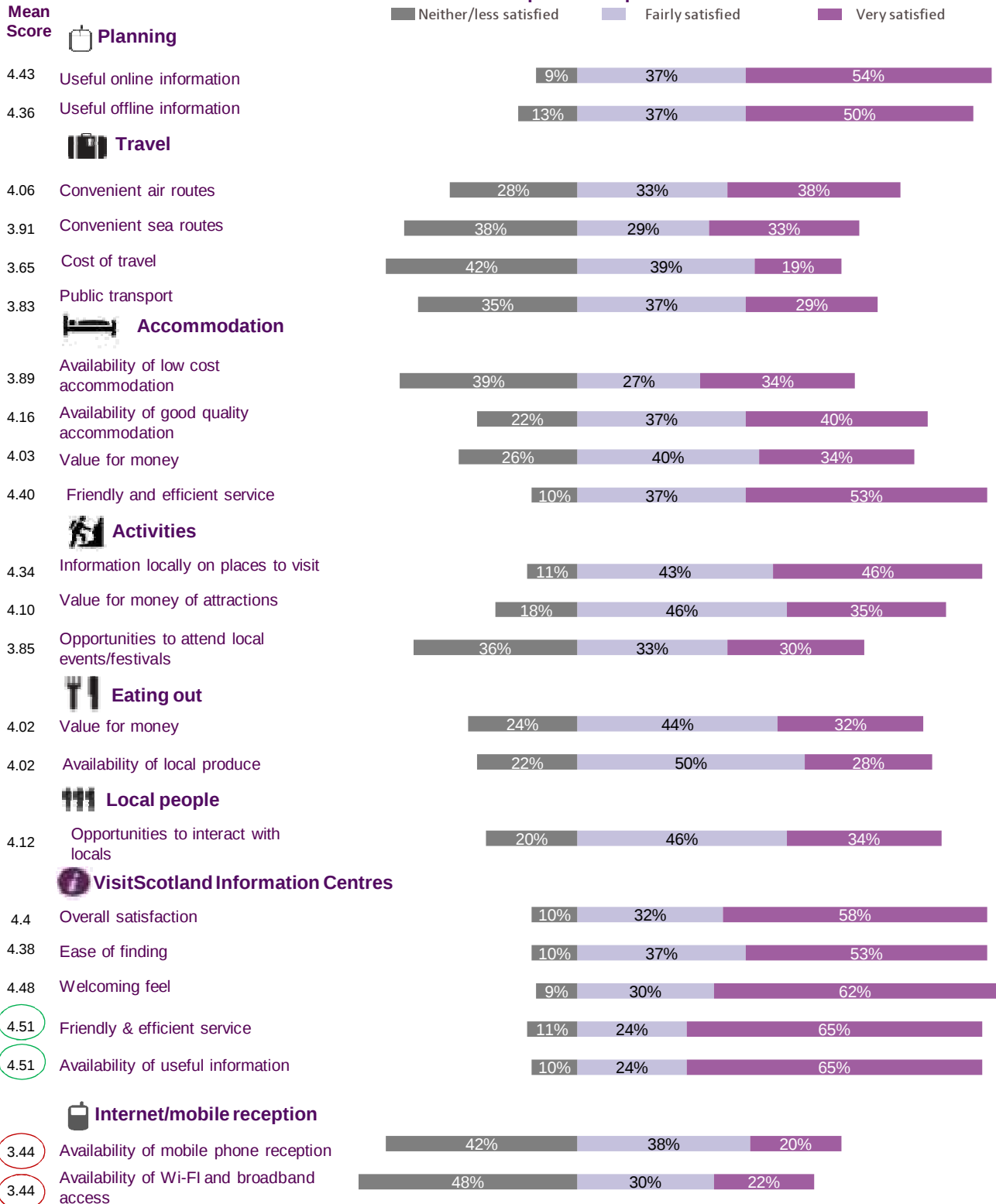
Most visitors to Loch Lomond and the Trossachs NP ate out in cafes (70%) and pubs and bars (58%) during their time in Scotland. Others ate out in hotels (45%) and good quality restaurants (42%). Budget restaurants were more popular amongst overseas visitors (41%).



Quality of Experience

Aspects of the Loch Lomond and the Trossachs NP visitor experience most likely to receive a 'very satisfied' rating include overall experience of VICs, friendly service in accommodations, and information available locally on places to visit. Less satisfied ratings were recorded for mobile phone reception, Wi-Fi and broadband access, and availability of low cost accommodation.

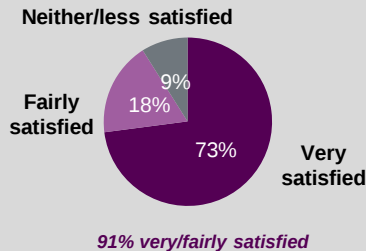
Satisfaction with different aspects of experience in Loch Lomond and the Trossachs NP



Note: All 599 visitors to Loch Lomond and the Trossachs NP were asked the above questions but data excludes those who provided no responses for aspects they had not experienced. The neither/less satisfied scores includes neither satisfied/dissatisfied, fairly dissatisfied and very dissatisfied scores.

Quality of Experience

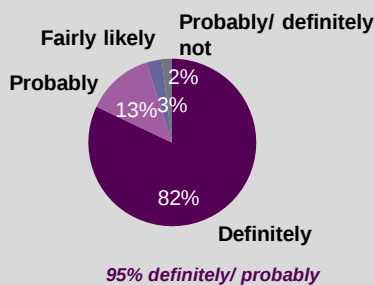
91% of visitors were satisfied and 95% will definitely/probably recommend Loch Lomond and the Trossachs NP based on their experiences. While 69% of all visitors will definitely/probably revisit Loch Lomond and the Trossachs NP in the next 5 years, this proportion varies from 72% of UK residents to 45% of international visitors.



Overall satisfaction with Loch Lomond and the Trossachs NP

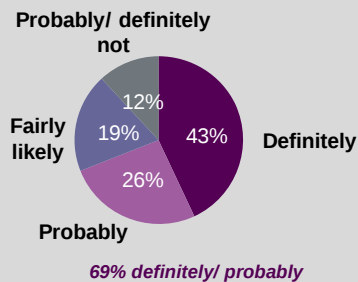
73% of visitors were 'very satisfied' with their overall experience in Loch Lomond and the Trossachs NP while 18% were 'fairly satisfied'. UK and overseas visitors had similar levels of satisfaction.

The neither/less satisfied scores includes neither satisfied/dissatisfied, fairly dissatisfied and very dissatisfied scores.



Recommending Loch Lomond and the Trossachs NP

82% visitors would definitely recommend Loch Lomond and Trossachs as a destination to others. Repeat visitors were more likely to suggest that they would definitely recommend the area (84%).



Returning to Loch Lomond and the Trossachs NP in the next 5 years

43% of visitors to Loch Lomond state that they will definitely return in the next 5 years (44% of UK residents compared to 29% from overseas). Those on a repeat visit to Scotland were more likely to say they will definitely return to Loch Lomond and Trossachs (48%).

Most enjoyed aspects

Below are examples of some highlights mentioned by visitors in 2012.

"Stunning views looking over Loch Lomond!"

"Absolutely breathtaking scenery in the Trossachs which is why I visit so often"

"In the Trossachs I enjoyed the countryside, landscape, scenery, opportunities for walking, friendliness of our host, friendliness of staff at most of the eating places we went to, and the helpfulness of the people at VisitScotland"

"The Trossachs fine scenery"

What could be improved?

Below are examples of some improvements suggested by visitors in 2012.

"Mobile phone reception, and more live music in pubs etc. We hoped to find more traditional sessions."

"Better prices for accommodation & meals."

The 2012 Scotland Visitor Survey was conducted for VisitScotland by TNS.

For further information please contact:

✉ VisitScotland, Ocean Point One, 94 Ocean Drive, Edinburgh, EH6 6JH

☎ 0131 472 2222 📧 research@visitscotland.com 🌐 www.visitscotland.org

Disclaimer: VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any errors or omissions.

TNS

Appendix - Using & Interpreting the Scotland Visitor Survey

Please use the following as guidance notes when interpreting the Scotland Visitor Survey:

- The Scotland Visitor Survey was carried out in 2011 and 2012 to gather information from holidaymakers in Scotland on their experiences of Scotland. The survey captured the views of leisure overnight visitors only (this could include Scots spending an overnight trip away from their normal place of residence, as well as UK and overseas visitors). People on a day trip from home, visitors whose main purpose was a business trip and cruise ship visitors were excluded.
- The Scotland Visitor Survey is a summer only survey, and due to the scale of the project it is not carried out for the full year. As such the results reflect the views of the main holiday season visitors who were in Scotland during June-September.
- Holidaymakers were recruited at locations in 14 different regions of Scotland (7 included in 2011 and 7 included in 2012. The islands groups of Orkney, Shetland & Outer Hebrides were excluded due to a separate visitor survey being undertaken for 2012/13).
- Between 5-10 locations per region were included to gain a spread of recruitment locations. Those recruited completed an online survey on their return home to allow respondents to provide details of their full holiday experience in Scotland.
- The main aim of the survey was to gather views on a wide range of topics to supplement data on tourism in Scotland which is gathered by the annual statistical surveys undertaken at a national level (The Great Britain Tourism Survey, which provides volume and value estimates of domestic tourism from within Scotland and the rest of Great Britain and The Office of National Statistics' International Passenger Survey, which provides details of tourism from abroad).
- The factsheets produced for the Scotland Visitor Survey report on 2 years data for the international markets (2011 and 2012) and one year's data for the regional fact sheets, dependent on the region covered in the fieldwork each year.
- The Visitor Survey does not gather information on volume or value of tourists to each region. For information on trips, nights and spend to Scotland or to regions of Scotland, please read the Tourism in Scotland fact sheet and regional fact sheets available on the Research & Statistics section of the corporate website www.visitscotland.org/research_and_statistics/tourismstatistics/national_statistics/tourism_in_scotland.aspx www.visitscotland.org/research_and_statistics/regions.aspx
- The Visitor Survey is not intended to include visitors who are participating in specific activities as their main purpose of the trip (e.g. visitors in Scotland on specific golfing break who may not be found in the general recruitment locations).

Further details of the methodology behind the survey are available within the main presentation slides made available on the Research & Statistics section of the corporate website

- www.visitscotland.org/research_and_statistics/visitor_research/global.aspx

The 2011-12 Scotland Visitor Survey was conducted for VisitScotland by TNS.
For further information please contact:

✉ VisitScotland, Ocean Point One, 94 Ocean Drive, Edinburgh, EH6 6JH
☎ 0131 472 2222 📧 research@visitscotland.com www.visitscotland.org

Disclaimer: VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any errors or omissions.



TNS