



progressive



Loch Lomond & The Trossachs National Park
Evaluation of visitor experiences
of camping in the National Park
November 2018





Background and objectives



Method and sample



Research findings

- Profiles of campers
- Planning and booking trips
- Types of camping trips in the park
- Camping experiences



Conclusions and recommendations

Project background

During the summer months large numbers of campers visit Loch Lomond and the Trossachs National Park (LLTNP), where they can choose from several camping options: commercially run campsites, informal campsites with limited amenities, wild camping in permit areas within camping management zones or wild camping across the wider National Park where no restrictions apply.

New camping bylaws were introduced in March 2017 to protect certain areas from damage as a result of overuse. This involved the creation of camping management zones where camping is restricted to designated permit areas within each zone.



LLTNP wishes to better understand the priorities of campers visiting the Park, including their satisfaction levels, opportunities for improvements, and the economic impact of their activities.

These insights will inform opportunities for businesses, and for the National Park Authority and its partners, to develop new products and services to meet demand and ensure that campers enjoy a high quality, authentic experience when visiting the National Park.

Research objectives

The overall research aim was to explore the experiences of all types of camper, in relation to four key objectives:

1: Profile of campers

Including demographics of campers and how this differs depending on the camping options they use, who campers come to the park with and how often they camp; both at LLTNP and elsewhere.

2: Planning and booking behaviours and motivations

Including exploring the reasons people go camping and why they choose a particular site; campers' preferred type of facilities, what sources of information they use and how and when they book their trip.

3: Profile of camping trips taken in the Park

Including how people travel, how long they camp for, what activities they take part in, what facilities they use, what equipment and supplies they bring, buy or hire while on their trip and how much they typically spend.

4: Evaluation of camping experiences

Looking at both positive and negative factors and what suggestions campers would make to improve the Park; how safe and secure they feel camping in the Park; and how likely they would be to camp in the Park again.

Method and sample



Quantitative research

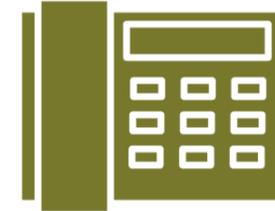
Self completion online questionnaire amongst respondents from:

1. a database of customer email addresses collected by LLTNP as part of their permit application process
2. additional responses from links promoted on LLTNP and local camping groups' social media platforms.

Target audience = those who have camped in Loch Lomond and the Trossachs National Park.

Fieldwork conducted between 4th December 2017 and 18th October 2018.

369 completed surveys – sample provides a dataset with a margin of error of between $\pm 1.02\%$ and $\pm 5.10\%$, calculated at the 95% confidence level (market research industry standard).



Qualitative research

Teledeth interviews with sample of respondents who opted in for interviewing via a question in the online survey.

Interview length approx. 25 minutes.

£15 incentive offered to respondents to encourage participation.

Notes on reporting & Data analysis

- It should be noted that visitors who had camped/been caravanning at LLTNP were contacted through email invitations (sent to a database collected at LLTNP as part of the permit application process) and through links online and on social media promoted by LLTNP and local camping groups. The sample therefore represents a snapshot of visitors on these databases or using these social media platforms and who have chosen to take part, and as such does not represent a full profile of all campers in the Park. For example, only 4% of those surveyed were staying in formal campsites, which is likely to reflect the sampling method used rather than the actual proportion of overnight visitors to LLTNP who chose this accommodation option.

Where figures do not add to 100% this is due to **multi-coded responses or rounding**

Where base sizes are low a caution sign is shown.
These results must be read with caution



Profile of campers



Profile of campers

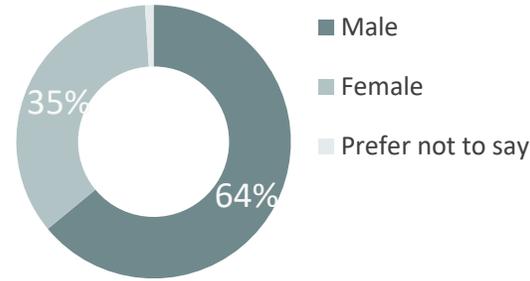
Demographics

- 64% of the sample were male and 35% female.
- The large majority of survey respondents were aged between 25 and 64 (89%). There is a fairly even spread of ages within this, but respondents were most likely to be aged 45-54 (29%). In Scotland overall there is a smaller proportion of people in this age range: 54% of the population is aged between 25 and 64 and 15% are from the 45-54 age bracket (information is from the latest Scotland Census - 2011).
- 56% of the sample live in Scotland and 36% had travelled from other areas of the UK (particularly England: 34%). 9% had travelled to the Park from outside the UK.
- Compared to VisitScotland figures for visitors to Scotland as a whole, this is a higher proportion of Scottish visitors (generally 35-40%). Scotland based visitors were most likely to live in the central belt, particularly Glasgow & Edinburgh.
- The highest number of overseas visitors came from Germany (6), the Netherlands (6) and the USA (3).

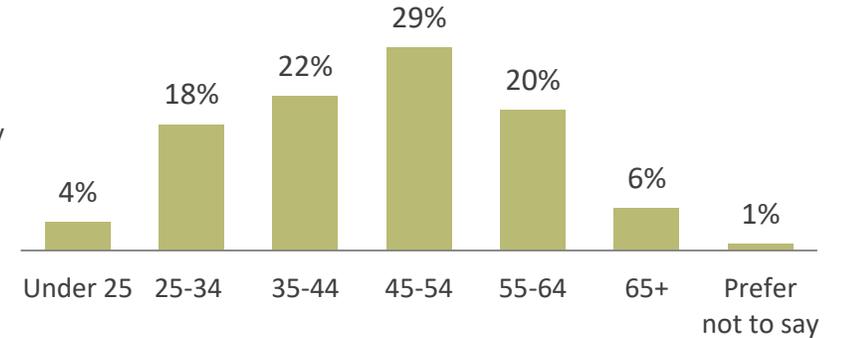
Age, Gender & Location



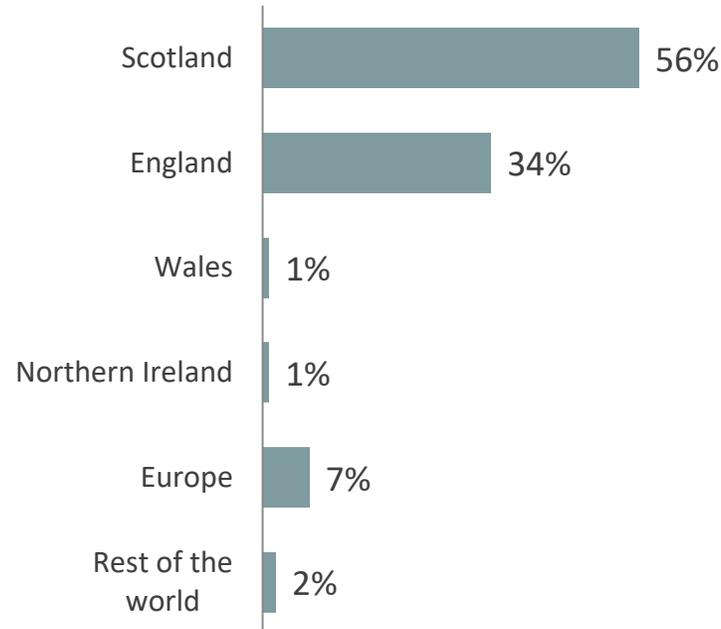
Gender



Age group



Location



Scottish locations - % of whole sample	No.
<i>Glasgow</i>	15%
<i>Edinburgh</i>	8%
<i>Stirling</i>	3%
Strathclyde	11%
Fife	5%
Central	5%
Lothian	4%
Dumfries Galloway	2%
Tayside	1%
Highlands and Islands	1%
Grampian	1%
Borders	<1%
Base	369

Profile of campers

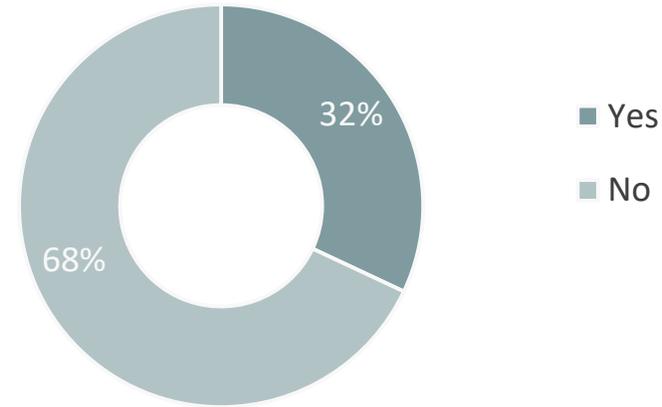
Demographics

- Approximately a third of the sample had children under 16 living at home.
- Almost two thirds were in full time work, reflecting the high numbers of respondents of working age. This compares to 40% of the Scottish population overall (Scotland Census 2011 data).
- Retired visitors account for 15% of the sample. Those coming to the Park from areas of the UK outside Scotland were more likely to be retired (24%).
- Visitors from outside the UK included a higher proportion of full-time students (19%), which compares to just 2% of respondents from within Scotland.

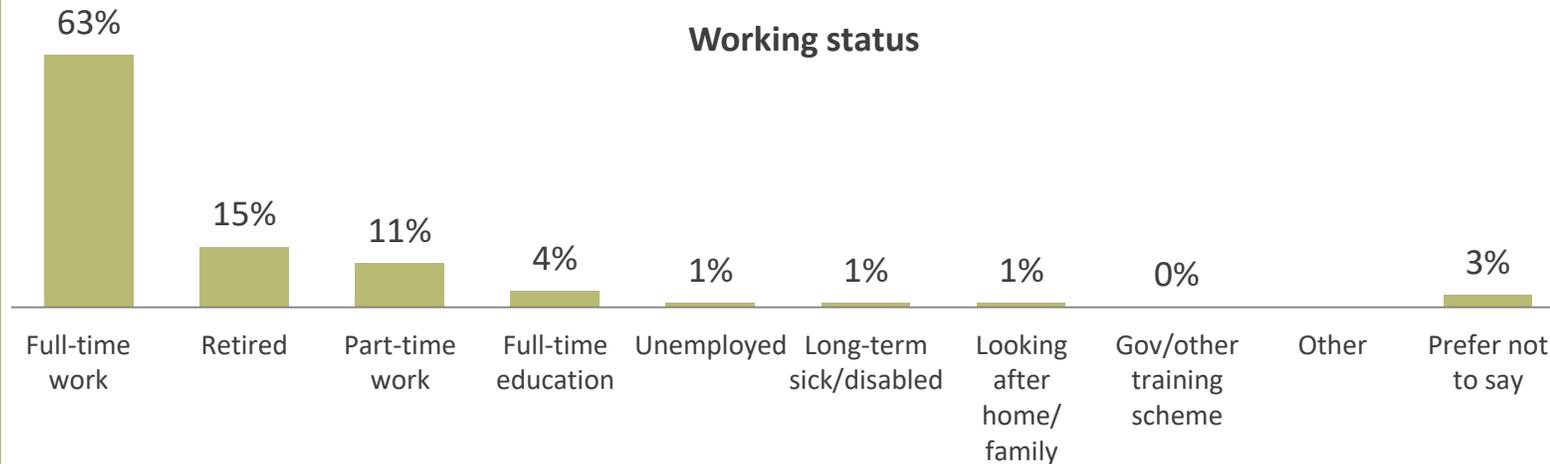
Children & Working status



Children under 16 in the household



Working status



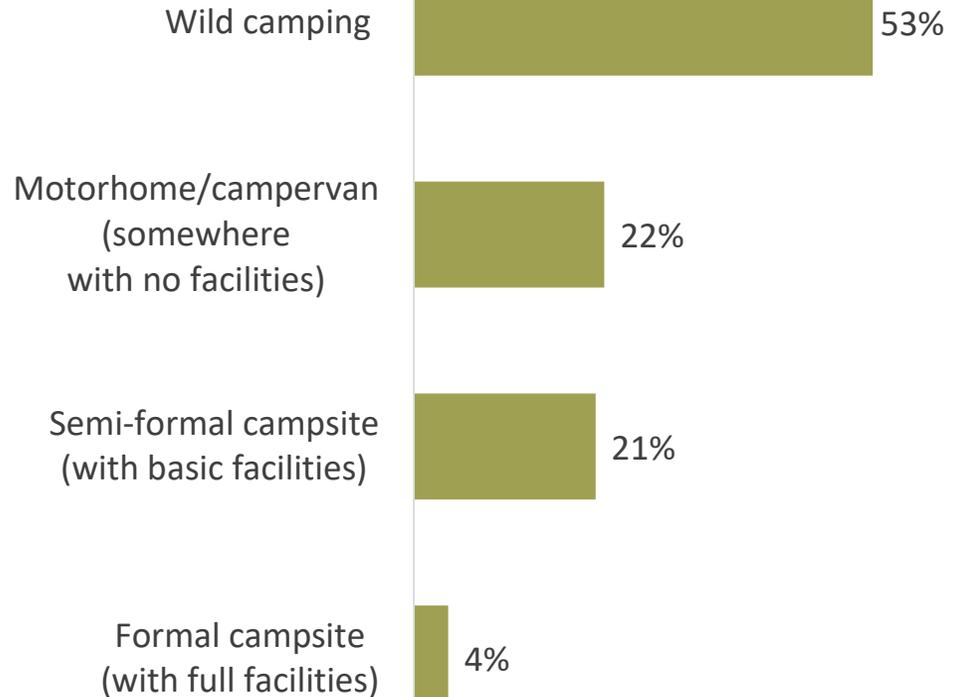
Profile of campers

Camping options used

- Respondents were asked which type of facilities they had chosen to use at the Park. Reporting compares responses across these four groups to explore how priorities and experiences differ depending on the camping options used at the Park*.
- More than half of the sample had chosen to wild camp in the Park.
- The proportion of those staying in a motorhome or campervan somewhere with no facilities and those at semi-formal campsites was similar, with around a fifth choosing these options.
- Only 14 people had been at a formal campsite on their last camping trip at the Park.

* Please note these figures are likely to reflect the sample databases available for survey invitations to be sent to, and are not intended to be a measure of the profile of all campers in the Park.

Type of facilities used

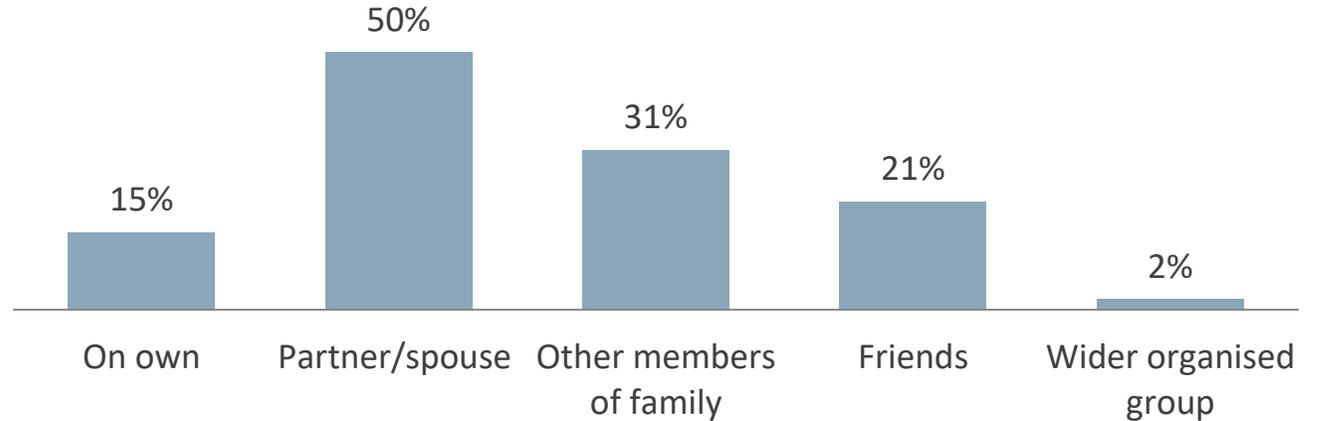


Profile of campers

Group composition

- On their last trip to the National Park, half of visitors were with their partner/spouse.
- Those wild camping were less likely to be with a partner (40%), which compares to 70% of people staying in a motorhome or campervan in an area without facilities.
- Under 25s were more likely than people aged over 35 to be camping with a group of friends (50% vs 18% of over 35s) and campers from Scotland were also more likely to be with friends (27%) than those from other areas of the UK (15%) and elsewhere (6%).
- More than 1 in 10 survey respondents camped in the National Park alone on their last visit, indicating considerable levels of confidence camping.

Group composition



The average number of adults per group was 2.4

Profile of campers

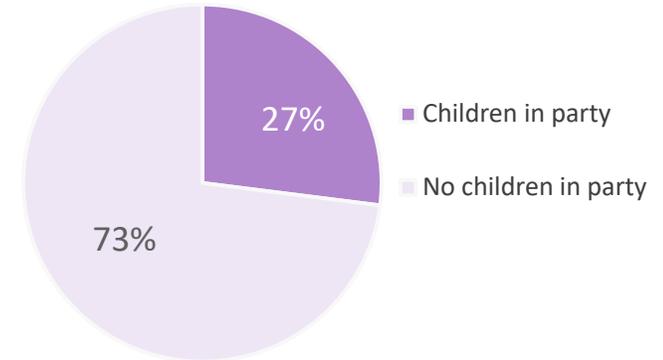
Group composition

- Over a quarter of groups camping in the Park included children.
- Among these, the average number of children per group was just over two (2.1). This included children from a range of ages.
- Wild campers had the largest average group size (3.2). This group were the most likely to be camping with children (31%) as well as being the most likely to be camping with a group of friends (27%).

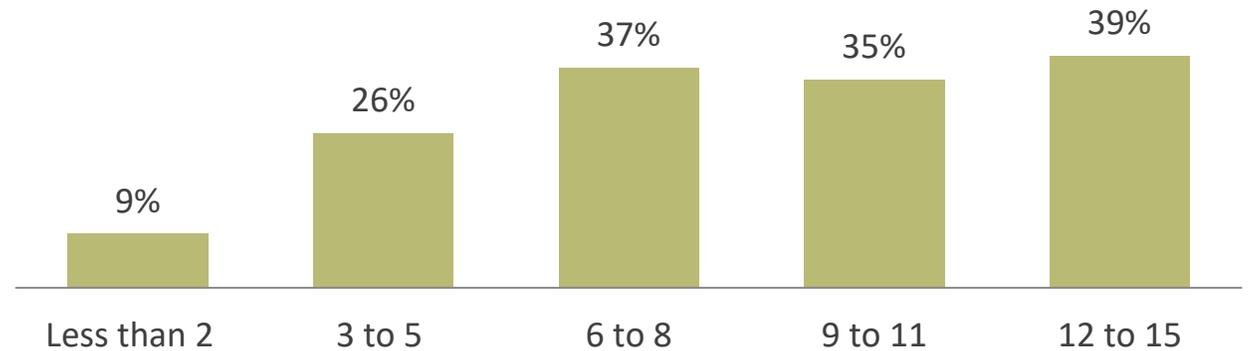
	ALL	Wild camping	Motorhome/ campervan*	Semi- formal campsites	Formal campsites
Average party size	2.9	3.2	2.2	3.0	2.9
Base size	369	195	81	79	14

* Motorhome / campervan users here are those who camped somewhere without facilities.

Group composition: children



Age of children



Q20: Including yourself, how many people were in your group on this trip? (Q20b: number of children)/ Q21 How old were the children in your group?

Base (all): 369
Base (all with children in group): 99

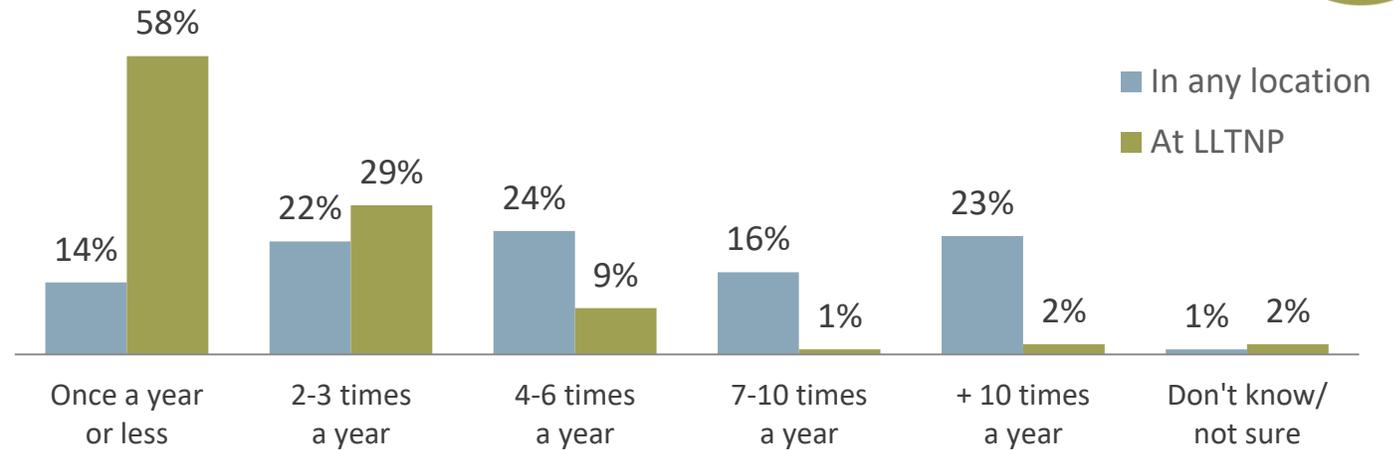
Profile of campers

Frequency of visits

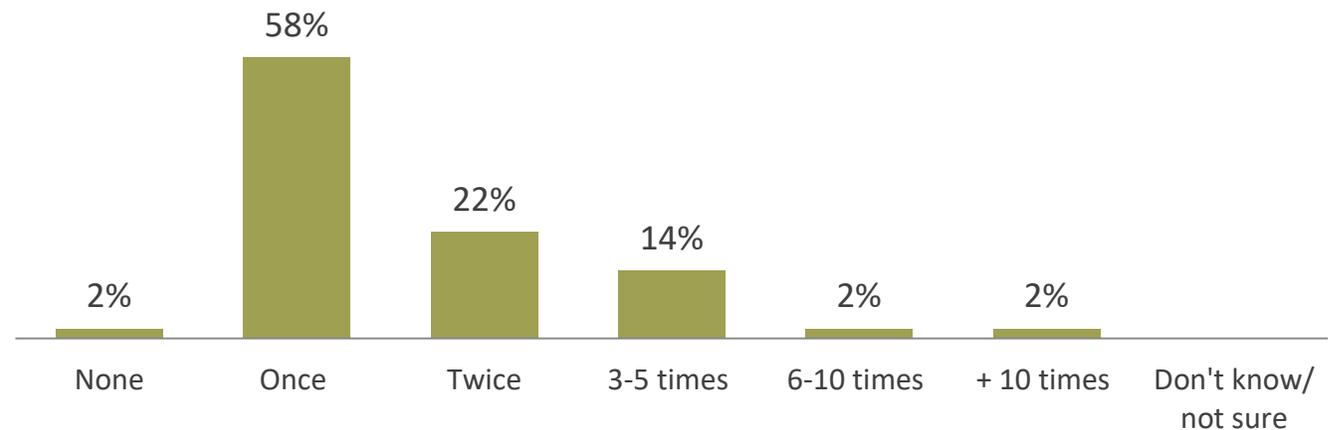
- Respondents were overwhelmingly regular campers, with 85% going camping (in any location) more than once a year and almost a quarter saying that over the course of a year they camp more than 10 times.
- The age group who camp the most (at any location) were those aged 55+ (49% camp 7 or more times a year, vs 37% of those aged 35-54 and 33% of those under 35).
- However, the majority generally only camp at LLTNP once a year or less (58%) meaning campers are choosing other locations for the majority of their trips.
- While most don't come to LLTNP for all of their camping trips throughout the year, the National Park does have a core of more prolific users: 12% camp at LLTNP more than 3 times a year.
- In the year prior to being surveyed 58% had only camped at the Park once, however 18% had been 3 times or more.



How often do you generally go camping?



How many times have you been camping in the National Park within the last year?



Q3: How often do you generally go camping (in any location)? / Q4: How often do you generally go camping in the LLTNP? / Q2: How many times have you been camping in the National Park within the last year?

Profile of campers by camping option used



- Sample profiles varied between users of different types of facilities at LLTNP, although small base sizes for those who used formal campsites mean comparisons cannot be included for this group.
- Those staying in motorhomes/campervans and in formal campsites were more likely to be from areas of the UK outside Scotland – specifically visitors from England – and also tended to be older than those who chose wild camping or semi-formal camping options.
- Wild campers were likely to be more local to the Park, with over two thirds living in Scotland.
- Average group size was largest for wild campers (3.2 people per group) followed by those using semi-formal camping facilities (3.0).
 - Both groups were more likely to be camping with children than the other groups (31% of wild campers and 29% of semi-formal campsite users were camping in groups which included children).
 - These two groups were also more likely to be camping with friends (27% for wild campers and 20% for semi-formal campsite users).
 - Both were less also likely to be with a partner/spouse, than motorhome/campervan users (40% of wild campers and 53% of semi-formal campsite users were with their partner/spouse).



Wild camping	Visitors tended to be...
Local	68% live in Scotland
Younger	Only 15% are over 55
Camping in the largest groups	Average group size 3.2 people
Base	195

Motorhome / campervan*	Visitors tended to be...
Non-Scottish domestic visitors	57% are from England
Older	43% are 55+
This group were the most likely to be retired	27%
Base	81



Semi-formal campsites	Visitors tended to be...
Local	51% live in Scotland
Aged 35-54	52%
Only camped once at LLTNP in the last year	63%
Base	79

* Motorhome / campervan users here are those who camped somewhere without facilities.

Planning & booking

Campers' most recent visit to the Park

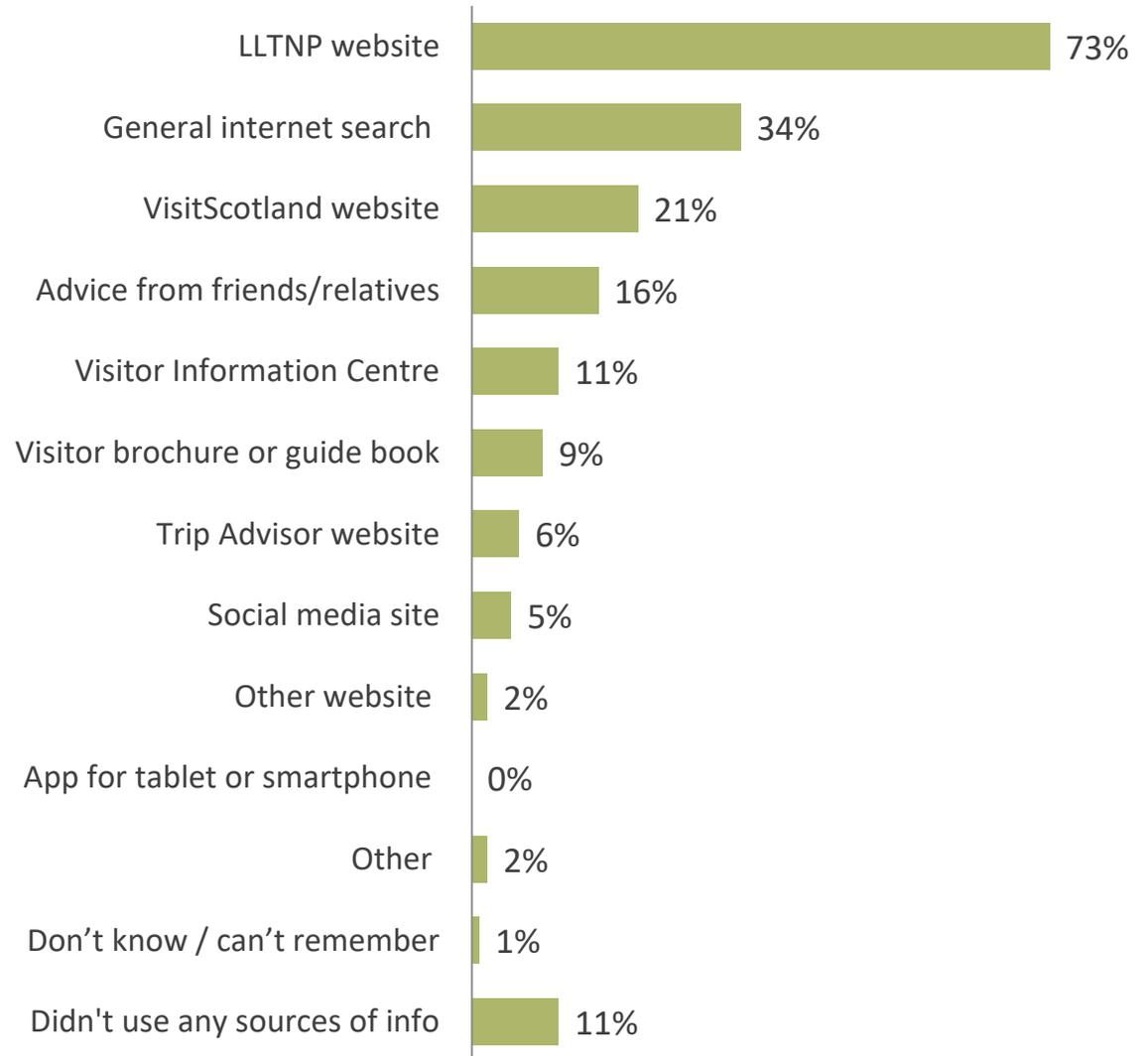


Planning & booking

Information sources

- The LLTNP website, followed by other online sources, were used most to find out about camping options.
- LLTNP website use is higher among those under 35 (84%) compared to those aged 35-54 (67%) and under 35s also have above sample average use of other online sources (46% used a general internet search to find information and 36% went to the Visit Scotland website).
- Perhaps unsurprisingly, those that camp at LLTNP more often were less likely to have looked for information before their trip (32% of those who generally camp 4+ times a year at the Park didn't use any sources of information).
- Those who had used a social media source were asked what this was. 15 people used Facebook (2 people gave details of which Facebook page they had visited: these were Wild Camping Scotland and a motorhome forum), 2 people used Instagram and 1 Twitter (no further details given).
- Other websites used were: Google maps (x 2), Bothy association website, Ukcampsite.co.uk, Wildcamping.co.uk, Westhighlandway.org, Walkhighlands, In your element and a 'camping and caravan site'.
- 'Other' sources were: advice from rangers/bailiffs (x3), maps (x 2), signs in the park (x 2), a West Highland Way leaflet and on the radio (radio 4, programme unspecified).

Where campers look for information

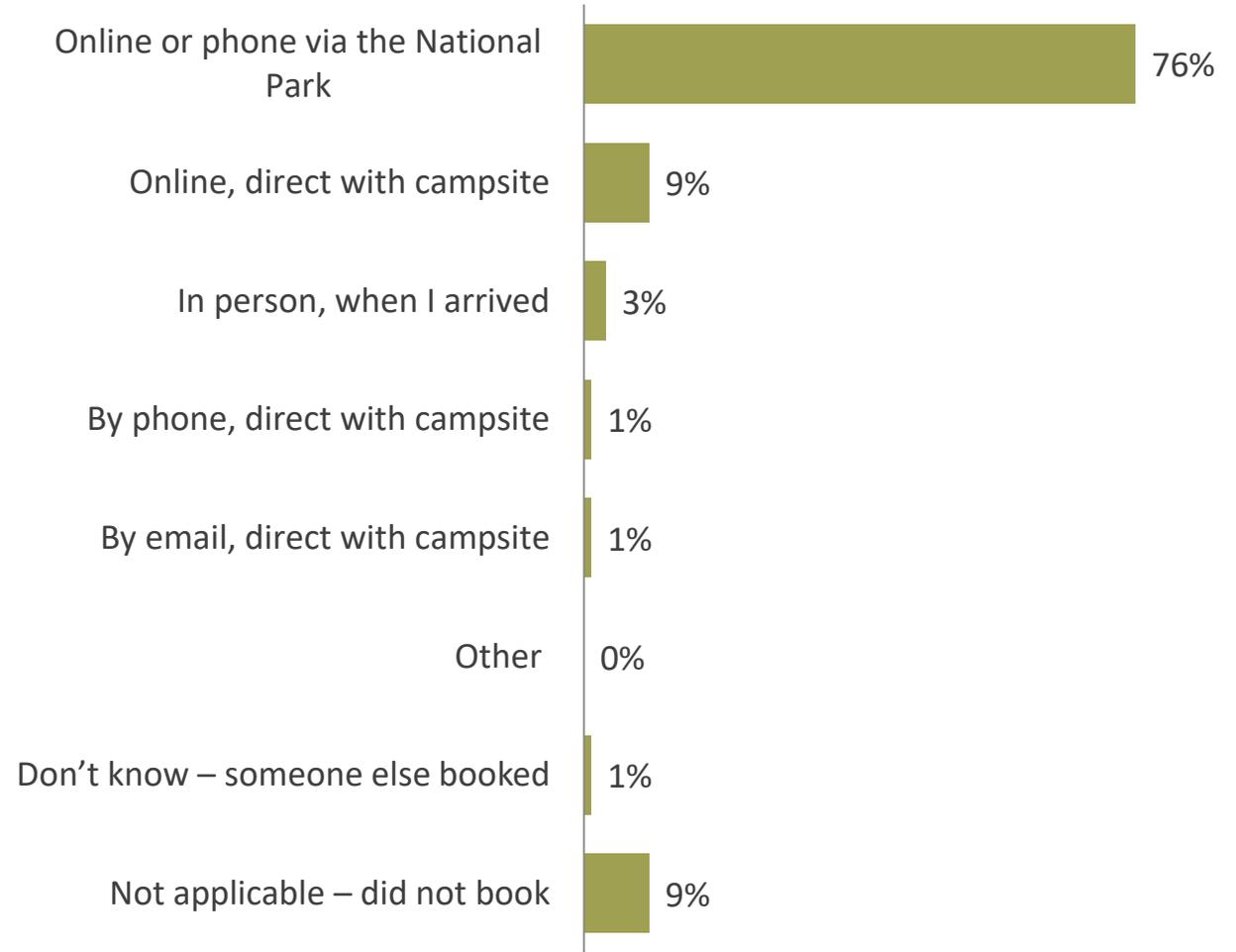


Planning & booking

Booking methods

- More than three quarters of campers booked through LLTNP (this finding may reflect the sampling method for the research).
- This was significantly lower, however, for those who chose to stay in a formal campsite (21%), who instead had higher rates of booking directly on their campsite's website (57%).
- Visitors camping for 3 or more nights in the Park were also less likely to book via LLTNP (62%).

How trips are booked

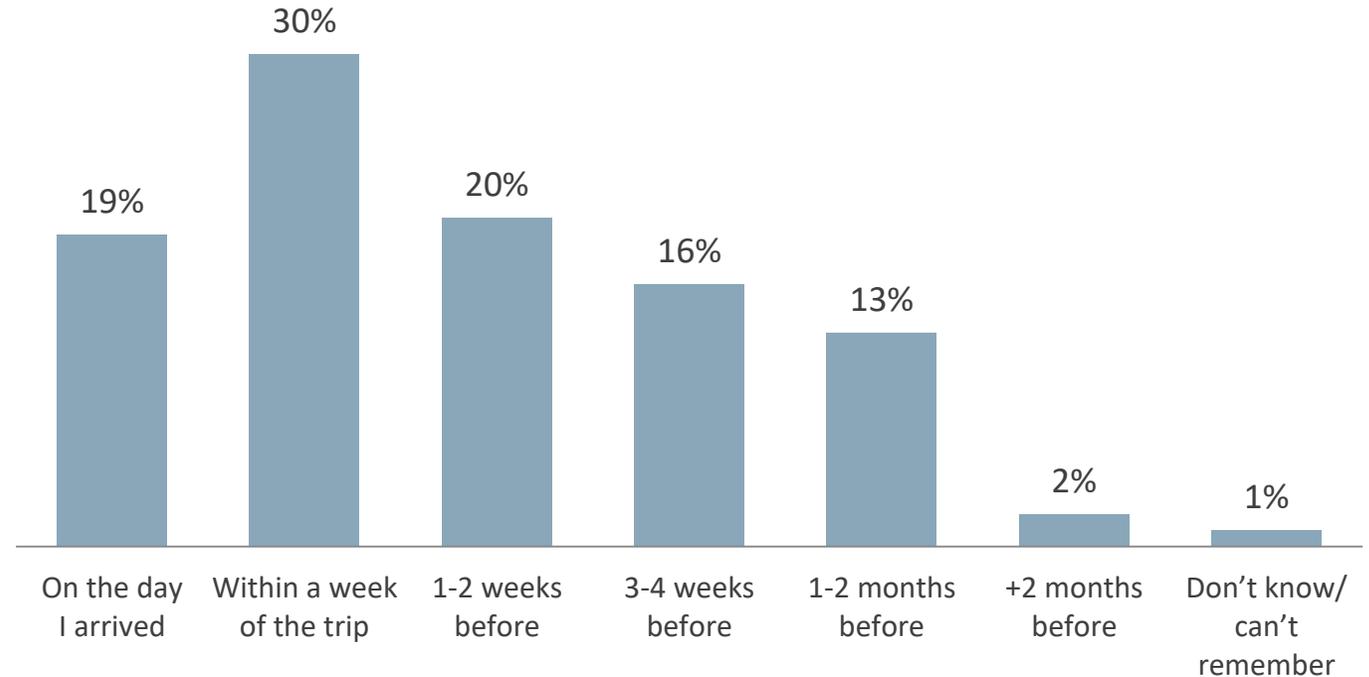


Planning & booking

Advance booking

- Camping trips at the Park are predominantly booked within 2 weeks of the trip (69%), with one fifth of people waiting until the day they arrive to secure their booking.
- The highest rates of on the day booking came from those staying in semi-formal campsites (29%).
- Visitors from Scotland were the least likely to book on the day (14% vs 24% of campers from other areas of the UK and 31% of non-UK campers). However, those from Scotland were the most likely to book within a week of their trip (40% vs 19% of other UK visitors and 6% of visitors from outside the UK).
- Overall there is little booking well in advance of trips but formal campsite users may be more likely to do so: 3 of the 14 formal campsite users (23%) had booked more than two months in advance.

When trips are booked



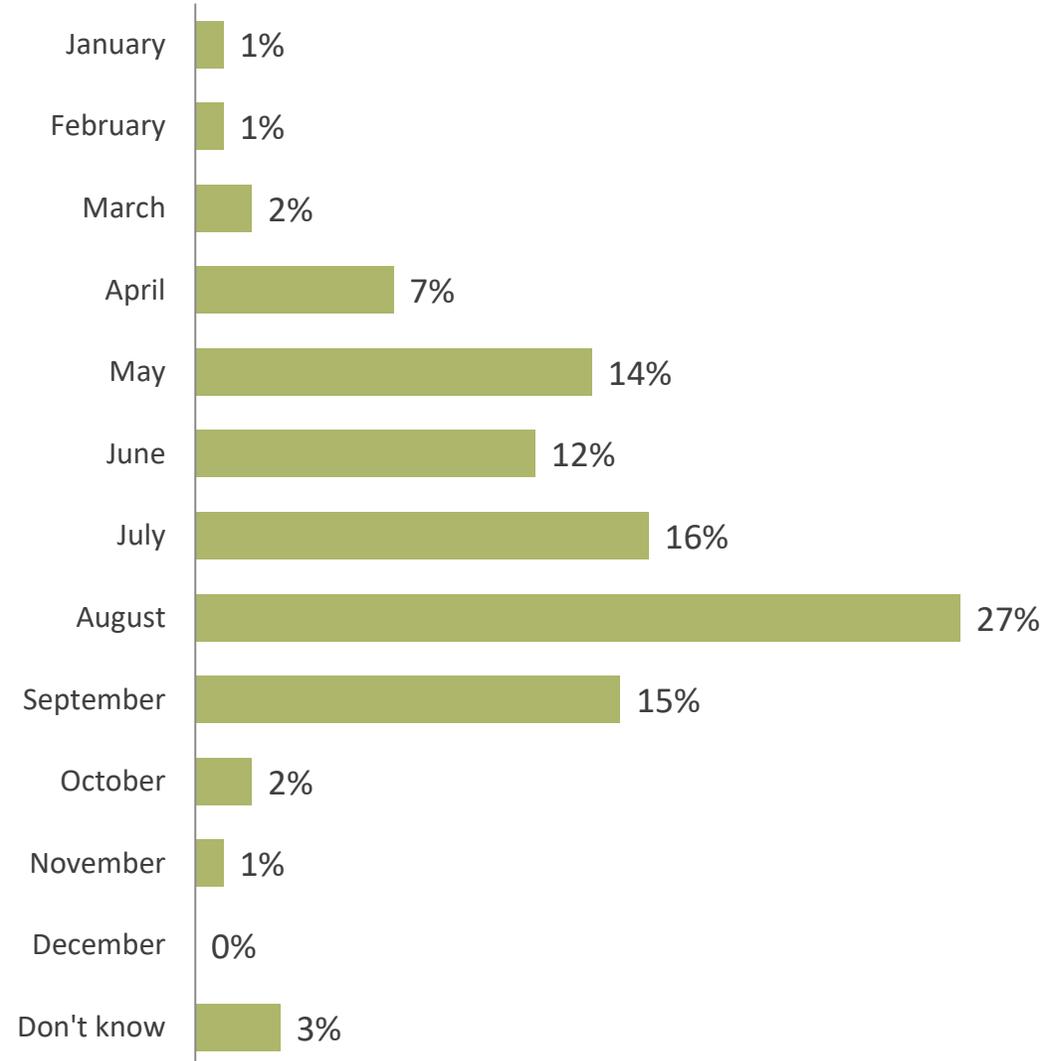
Planning & booking

Visit time

- Trips to the Park are condensed over the warmer parts of the year though there is some camping registered in all months except December.
- Those camping with children were more likely to visit during the summer (55%) than those without (38%).
- Under 25s were also more likely to camp during the summer months (69% of campers interviewed under 25 had last camped at the Park during the summer, compared to 32% of campers aged over 55%).

Season	%
Spring (Apr-Jun)	33%
Summer (Jul-Aug)	43%
Autumn/Winter (Sep-Mar)	22%
Don't know	3%

Month of last visit to the Park



Planning & booking

Camping location



- The most common camping locations used by those surveyed are shown to the right.
- There is extensive use of camping locations across the National Park, although only 6 were cited by 10+ people: Loch Lomond, Three Lochs Forest Drive, Loch Earn, Inveruglas, Loch Chon and Aberfoyle.
- One person interviewed had camped at Callander, Killin and Strathrye each. 'Other' locations mentioned by one person each were Sloy power station, Salloch & Inchtavannach. No one interviewed had camped at Sandbank, Loch Lubhair, Kilmun, Ardlui, Crianlarich, Gartmore, Gartocharn or Loch Goil on their last camping trip in the Park.

Camping locations	No.	Camping locations	No.
Loch Lomond	96	Milarrochy Bay	4
Three Lochs Forest Drive	64	Arrochar	3
Loch Earn	44	Balloch	3
Inveruglas	24	Balmaha	3
Aberfoyle	10	Balquhidder Geln	3
Loch Achray	9	Inchcailloch island	3
Loch Lubnaig	9	Luss	3
Loch Venachar	8	Loch Eck	2
Rowardennan	8	Loch Katrine	2
Loch Long	6	Tyndrum	2
Loch Voil	6	Loch Chon	16
Inverarnan	4	Firkin Point	4
Loch Ard	4	Loch Drunkie	3
Lochearnhead	4	Lochan Maoil Dhuinne	2

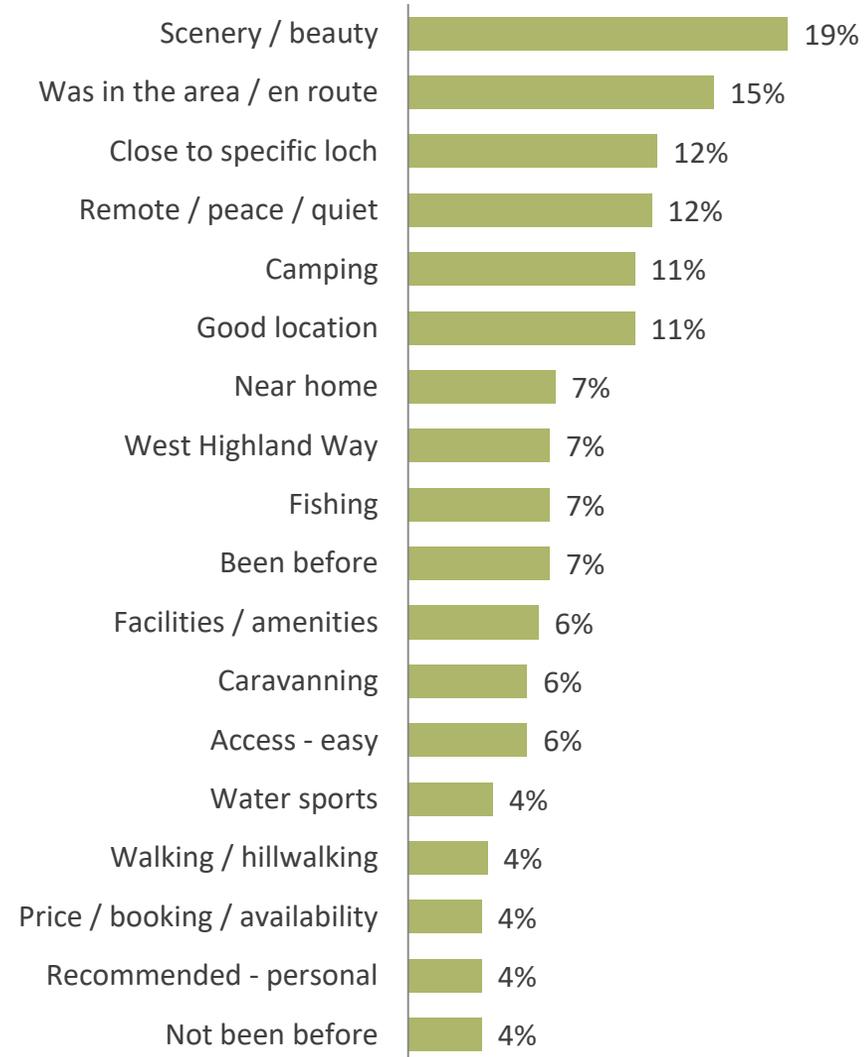
These locations were given by participants who selected the 'other' option (only locations cited by more than one person are shown)

Planning & booking

Camping location

- When asked what had prompted their location choice, scenery/beauty was the most commonly mentioned factor.
- Wider activities also influenced location choice for a significant proportion of campers: 15% mentioned they were in the area/camped en route to another part of Scotland and 7% specified their visit was a stop in the West Highland Way.
- Proximity to activities was also a consideration for some campers with fishing (7%), water sports (4%) and walking (4%) factors in decision making.

Reasons for location choice



Responses given by 3% or less of respondents are not shown

Q7: Why did you choose to stay in this particular location? – open-ended

Base (all who left comments): 358

21



Planning & booking

Reasons for location choice

We were heading to the far north west of Scotland and Loch Lomond was an ideal 2 night stop over before our trip as well as being beautiful.

I found it on your website and the location looked amazing on google maps. Very close to the loch and easy access!

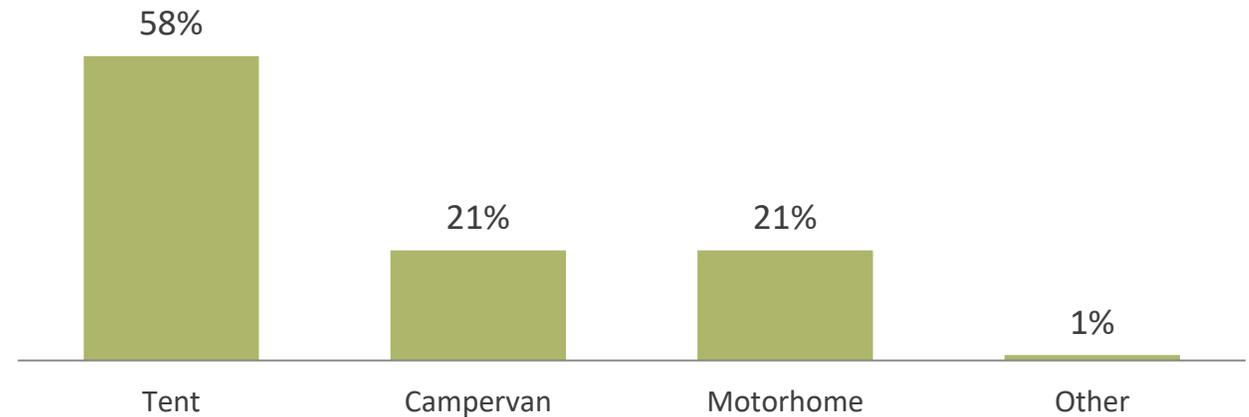
Inexpensive. First time there. Near my home. Great facilities. Beautiful scenery. Near a pub. Lots of things to do in the area. Great for campervans. Swimming in the loch.

Planning & booking Accommodation

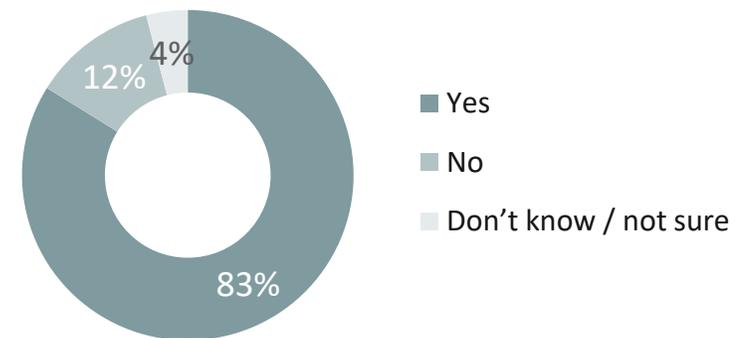
- Most campers had stayed in a tent on their last trip to the National Park (58%).
- Those who had camped in a group with children were more likely to have used a tent (75%) than those without children (51%).
- Under 35s were also more likely to be staying in a tent (80%).
- There was a higher proportion of motorhome use among campers aged 55 or over (46% of this age group were staying in a motorhome).
- 'Other' types of accommodation were a bivvy hut, a log pod, a kayak and a permanently sited caravan.
- The large majority of survey respondents had needed a permit to camp (83%) – although this is likely to be a reflection of the sampling method used, as customer email addresses to which invitations were sent were from a database of information collected as part of the permit application process.



Type of accommodation used



Permit required

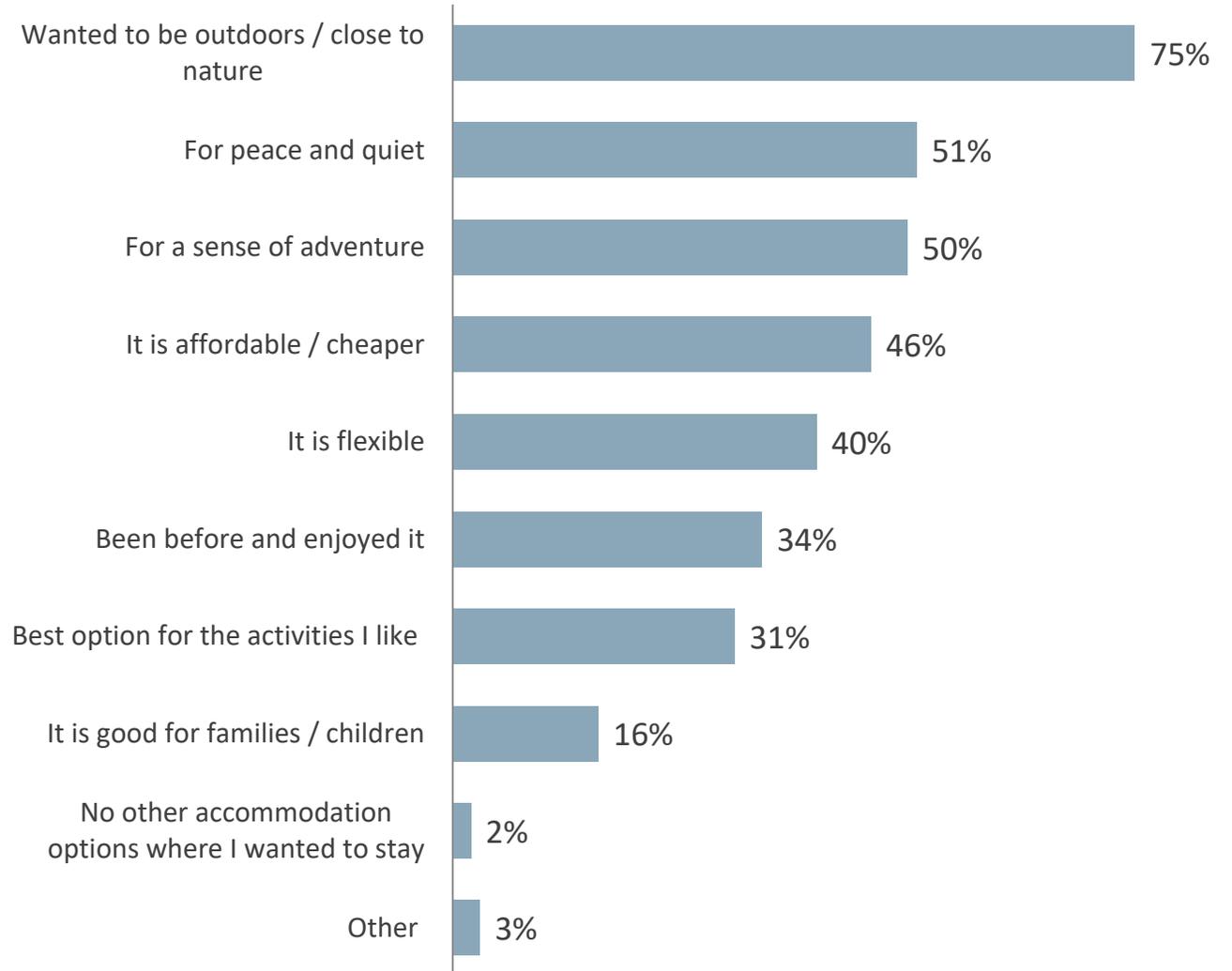


Planning & booking

Appeal of camping

- When asked why they chose a camping trip, being outside and close to nature was a key factor. This was particularly important for those aged under 35 (89% selected this option vs 76% of 35-54 year olds and 60% of those aged 55+).
- Peace and quiet was also important for more than half of respondents. Visitors from outside the UK were more likely to value peace and quiet (81% vs 47% of people from Scotland).
- A sense of adventure was particularly important for younger campers. 72% of those under 35 chose this as a reason for camping (and 81% of campers under 25 chose this reason) compared to 49% of the 35-54 age group and 34% of those aged 55+.
- Affordability was also more important for those aged under 35 (66% vs 40% for 35-54 year olds and 41% for those aged 55+). Visitors from outside the UK were also more likely to chose this as a reason for camping (63% vs 41% of campers from Scotland).
- Choosing to camp was not dictated by necessity for most, with only 2% stating there were no other accommodation options in the area they wanted to stay in.

Reasons for camping



Q11: Why did you choose to go camping/caravanning rather than use another type of accommodation?

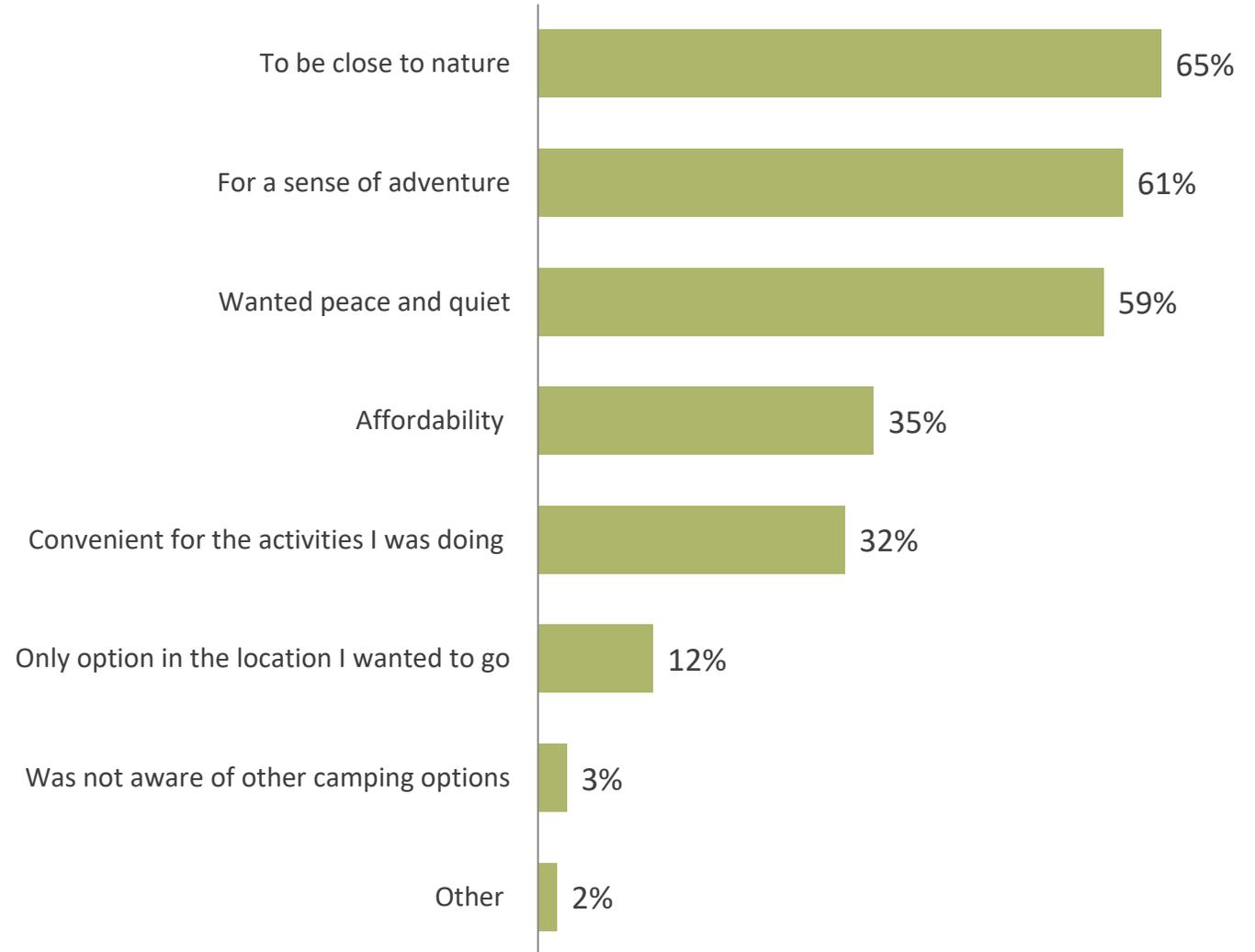
Planning & booking

Appeal of camping

- The factors that were most important in the decision to wild camp are similar to those given for choosing to camp/go caravanning overall. Wild campers valued being close to nature, having a sense of adventure and peace and quiet above other factors.
- Under 35s were particularly likely to choose being close to nature (81%) and a sense of adventure (76%).
- A sense of adventure was more likely to be given as a reason for wild camping by women (71%) than men (55%).
- Those wild camping without children were more likely than those with to value peace and quiet (67% vs 43%) and affordability (41% vs 22%).



Reasons for choosing wild camping



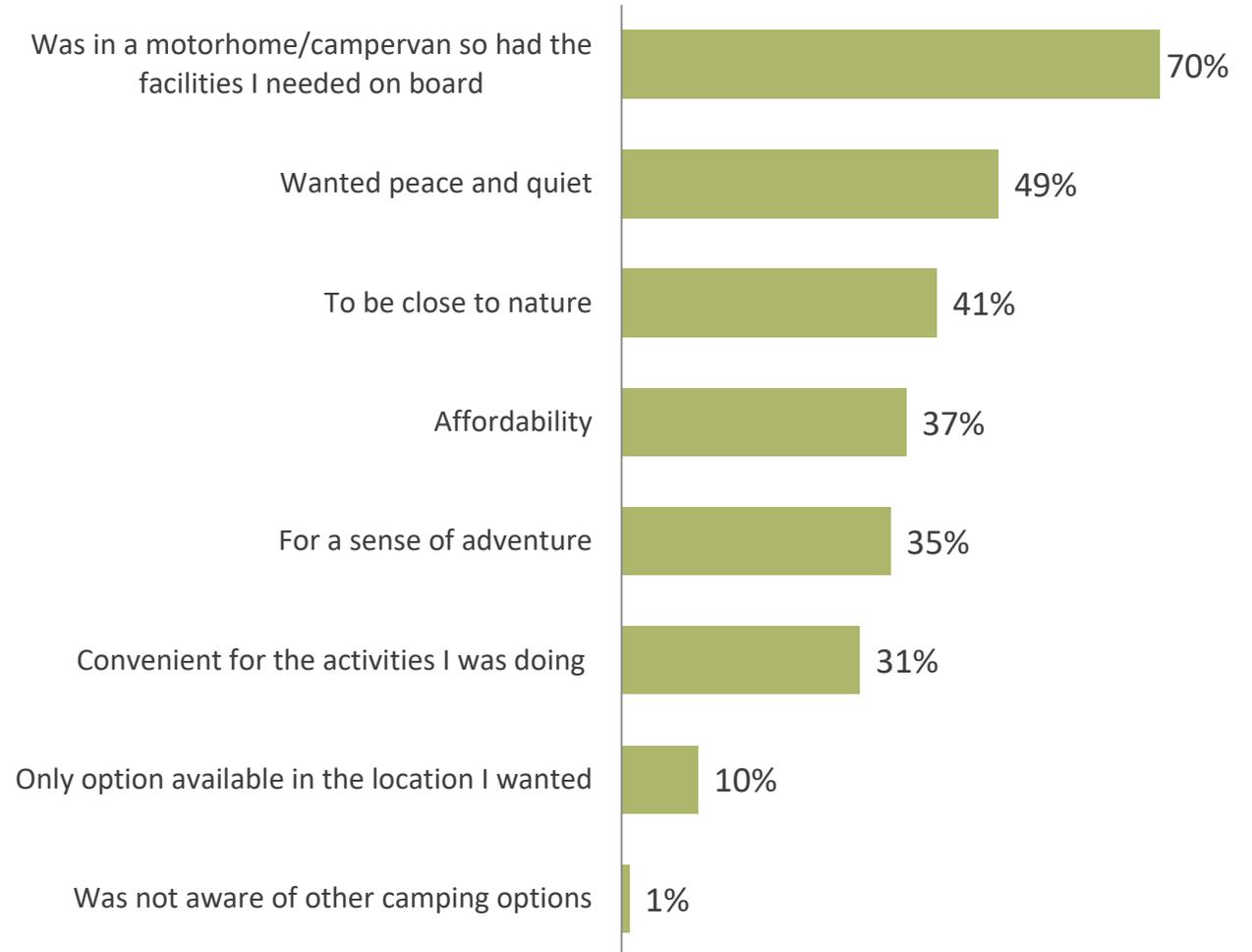
Planning & booking

Appeal of camping

- Having the facilities they needed on board was the reason most people said they chose to stay in a motorhome / campervan in an area of the Park without facilities.
- Motorhome / campervan users (somewhere with no facilities) also valued the peace and quiet, closeness to nature, affordability and sense of adventure offered by this accommodation option.



Reasons for choosing motorhome/campervan



Q15 - Why did you choose to stay in a motorhome somewhere with no facilities, rather than staying in a formal or semi-formal campsite?

Base (all who stayed in a motorhome/campervan): 81

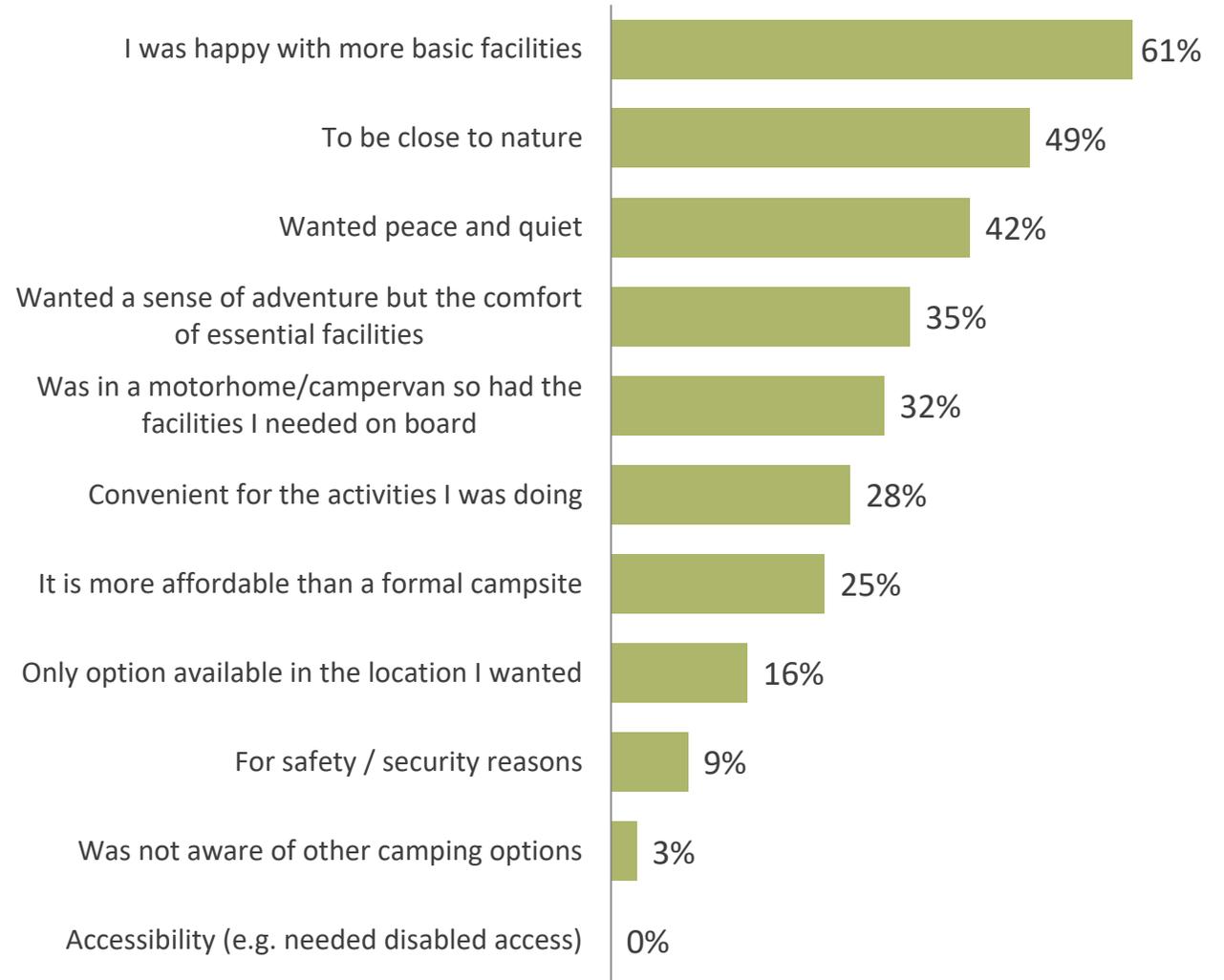
Planning & booking

Appeal of camping

- Being happy with more basic facilities was the main reason given for choosing to stay in a semi-formal campsite.
- As with campers in motorhomes/campervans in locations without facilities and those wild camping, being close to nature, peace and quiet and a sense of adventure were also important to this group.



Reasons for choosing semi-formal campsites



Q13 - Why did you choose a semi-formal campsite with basic facilities for this trip rather than a formal campsite or wild camping?

Base (all who used a semi-formal campsite): 79

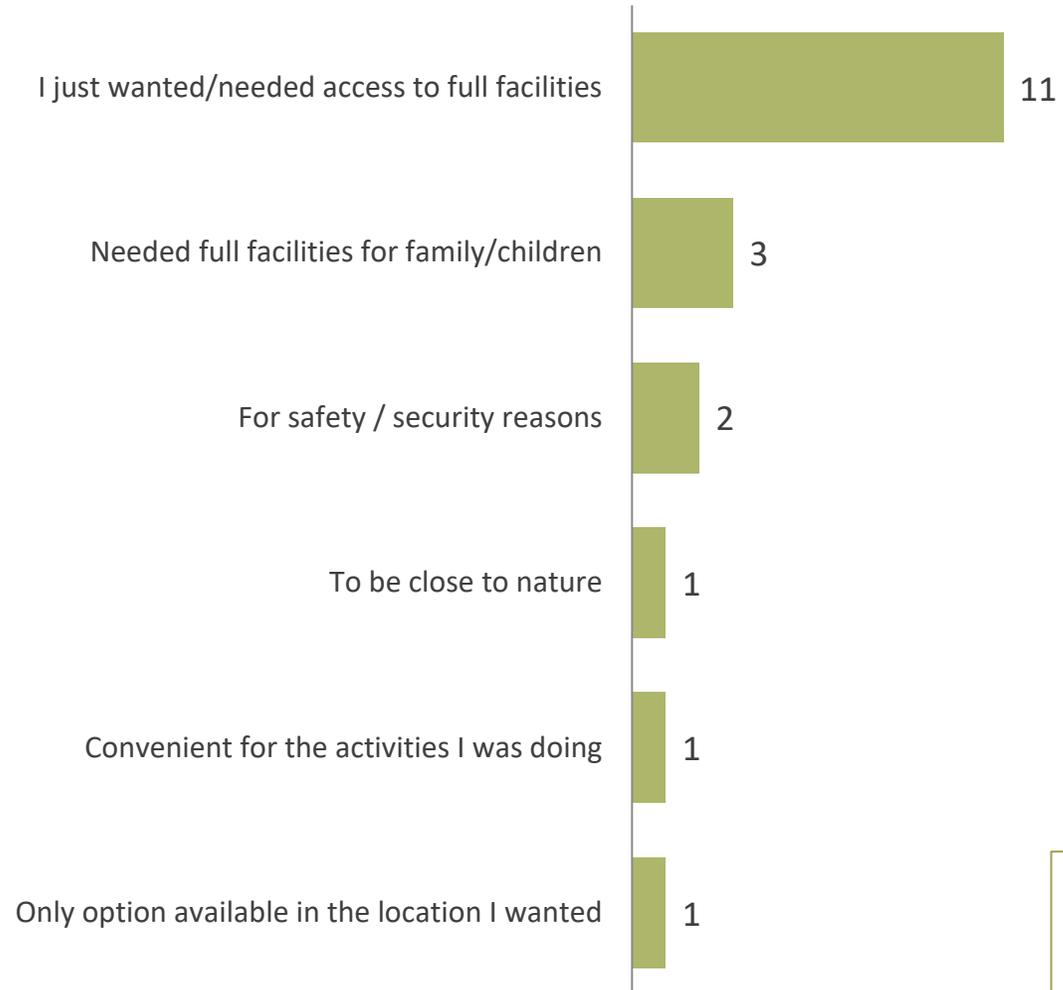
Planning & booking

Appeal of camping

- When choosing to stay in a formal campsite, access to facilities was key.
- While the number of respondents in this group makes it difficult to generalise from, peace and quiet and being close to nature, which were influential in decision making for those who chose other accommodation types, do not appear to hold the same importance for this group.



Reasons for choosing formal campsites



Due to the small base size this information is shown by the number of people who selected each option rather than as a percentage.

Q12 - Why did you choose a formal campsite for this trip, rather than one with fewer facilities or wild camping?

Planning & booking

Priorities for different groups



Priorities	Wild campers	Motorhome/ caravan users	Semi-formal campsite users	Formal campsite users
1st	To be close to nature	In a motorhome/campervan, had facilities needed on board	I was happy with more basic facilities	I just wanted/needed access to full facilities
2nd	For a sense of adventure	Wanted peace and quiet	To be close to nature	Needed full facilities for family/children
3rd	Wanted peace and quiet	To be close to nature	Wanted peace and quiet	For safety / security reasons

- The top three priorities in camping type choice for each group are shown above. For all groups except wild campers the factor most people gave for choosing their camping option related to the level of facilities they were happy with. Apart from those at formal campsites, being close to nature and peace and quiet were also important elements in camping choice.

Bases: Wild campers 195, Caravan/motorhome users 81, Semi-formal campers 79, Formal campers 14



Types of camping trips

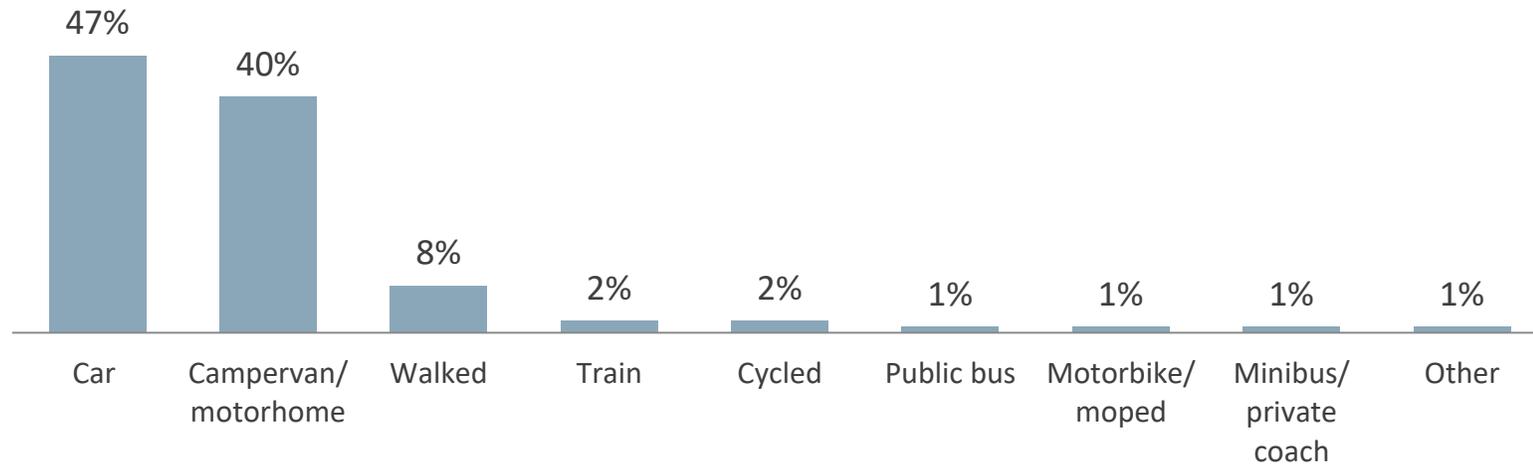


Types of trip

Getting to the Park

- Most campers travelled to the National Park by car or in a campervan or motorhome. Most other modes of transport were used by very small proportions of visitors.
- Wild campers were most likely to travel by car (66% vs 29% of semi-formal campsite users), as were those camping with children (71%) and campers from within Scotland (66%).
- People who generally camp 7+ times a year were more likely to be travelling to their camping location in a motorhome/campervan (63%).
- 8% of respondents had walked to their camping location – this is likely to be West Highland Way walkers. This proportion was higher for those aged under 35 than compared with those aged over 55 (12% vs 3%) and for people from outside the UK (28%).

Main mode of transport



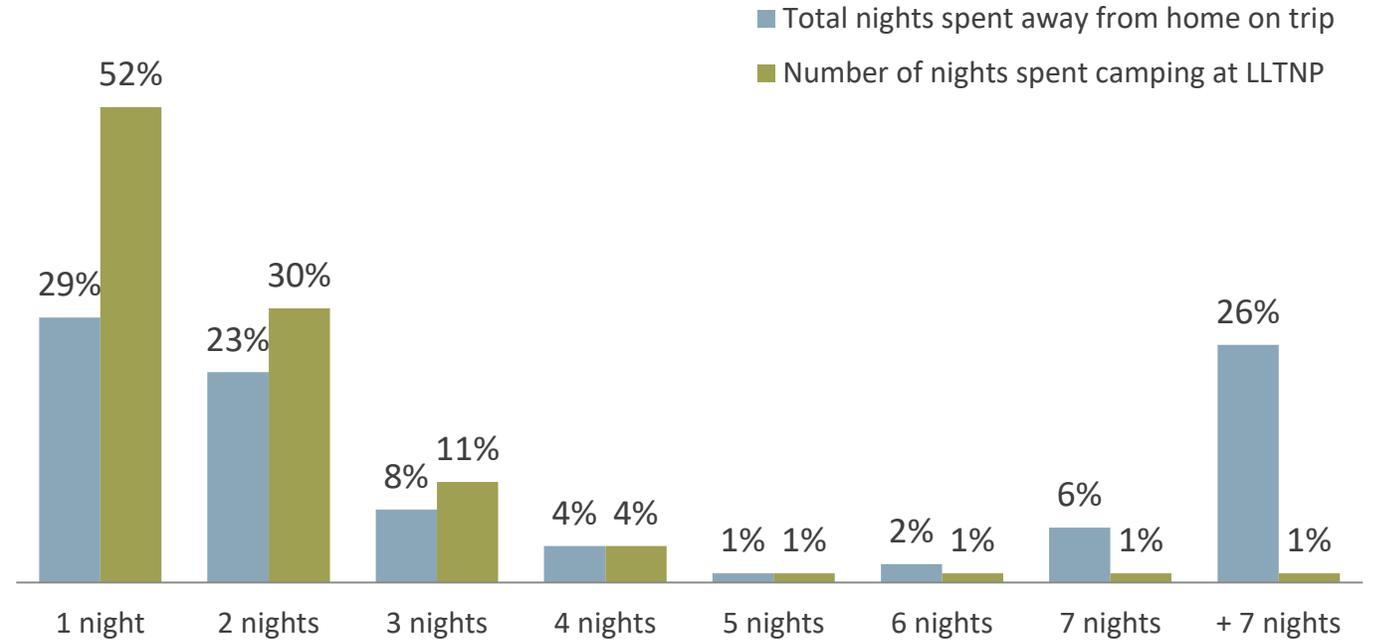
Types of trip

Length of holiday

- Just over half of campers spent a single night in the National Park; on average people were likely to have stayed for around 2 nights.
- Camping in the Park was part of a longer trip for many respondents – on average campers spent an additional 5.7 nights in locations other than LLTNP on their latest trip. This means many campers may be presented with an immediate comparison with other accommodation options and/or facilities, making it important for LLTNP to compare well with these to encourage repeat visits.

Average length of overall trip	Average length of stay in LLTNP
7.6 nights	1.9 nights

Nights spent away from home



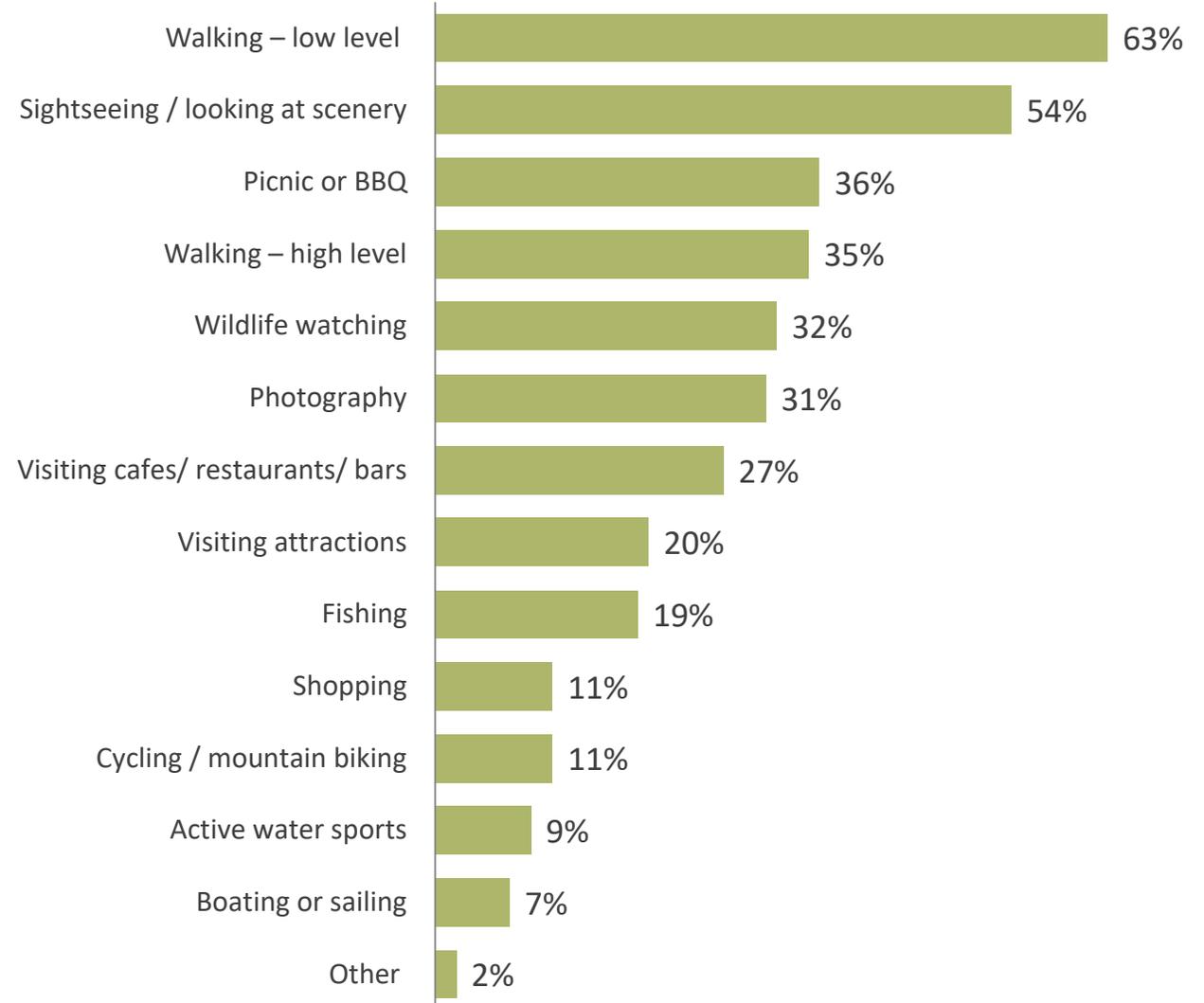
Q23: How many nights did you stay away from home on this trip?
 Q24 :And how many of these nights were spent camping in the National Park?

Types of trip

Activities during the visit

- More than half of campers spent time low level walking (on path surfaces or shorter distances) and around half spent time sightseeing/looking at scenery.
- Women were more likely than men to have spent time low level walking (73% vs 57%) and looking at scenery (62% vs 50%). People who were frequent visitors to LLTNP (those who generally camp 4 or more times a year in LLTNP) were less likely to have been low level walking (45%).
- People camping with children were more likely to have had a picnic or BBQ during their last trip (54%).
- Those who stayed for 3 or more nights at LLTNP on their last trip were more likely to have gone high level walking (50%) as were people from outside the UK (63%).
- 'Other' activities included climbing (x 2), working (x 2), running, sketching and visiting family.

Activities



Camping experience

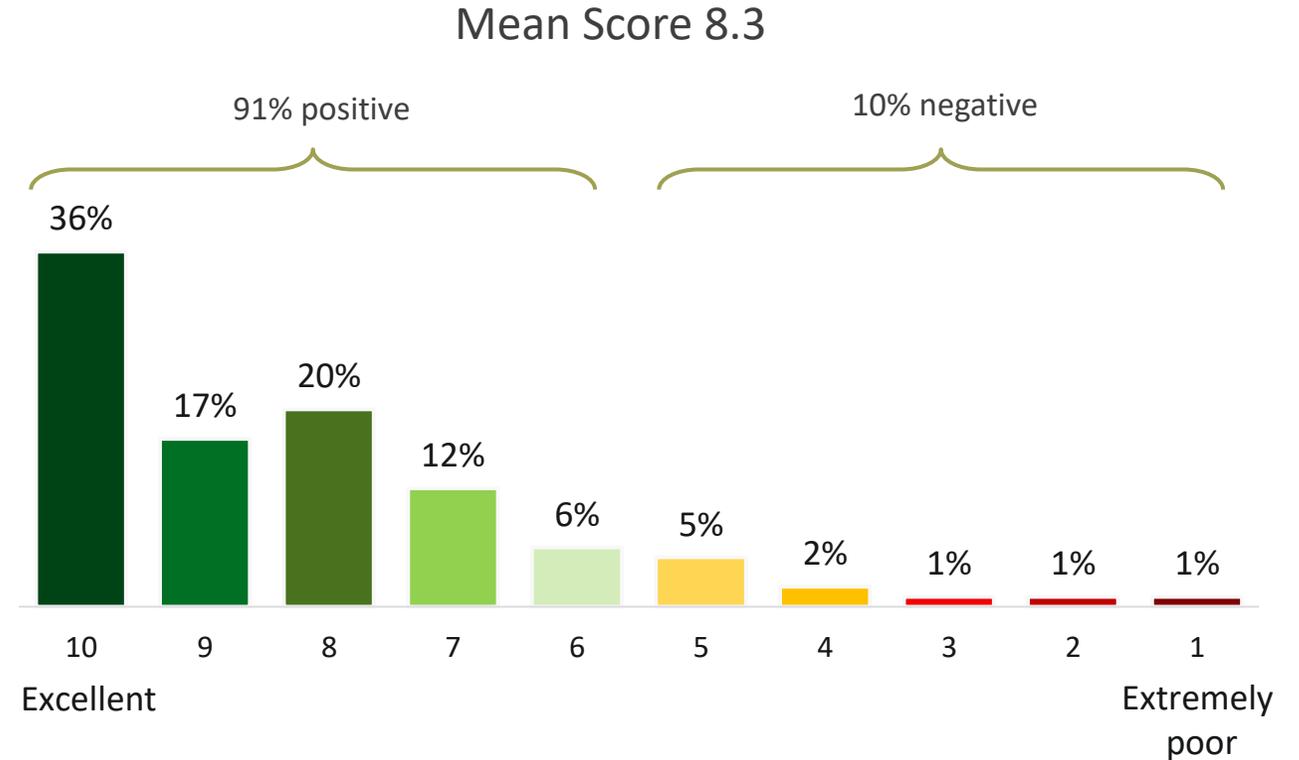


Camping experience

Rating the National Park

- Campers at the National Park rate their overall experience highly, with over a third giving it a 10 out of 10 score.
- The average (mean) score out of 10 overall was 8.3.
- Visitors from outside the UK had particularly strongly positive ratings, the mean score for this group being 8.9 out of 10.
- Campers with children were less strongly positive about their experience (mean score 7.9).
- There were also differences in ratings depending on age, with under 35s more positive overall (mean score 8.8) compared to 35-54 year olds (mean score 8.0). In particular, the 35-44 age bracket gave a lower mean score of 7.7. This finding may be driven by visitors with children rather than age, as the 35-44 year olds were the most likely to be camping with children.

Rating the National Park

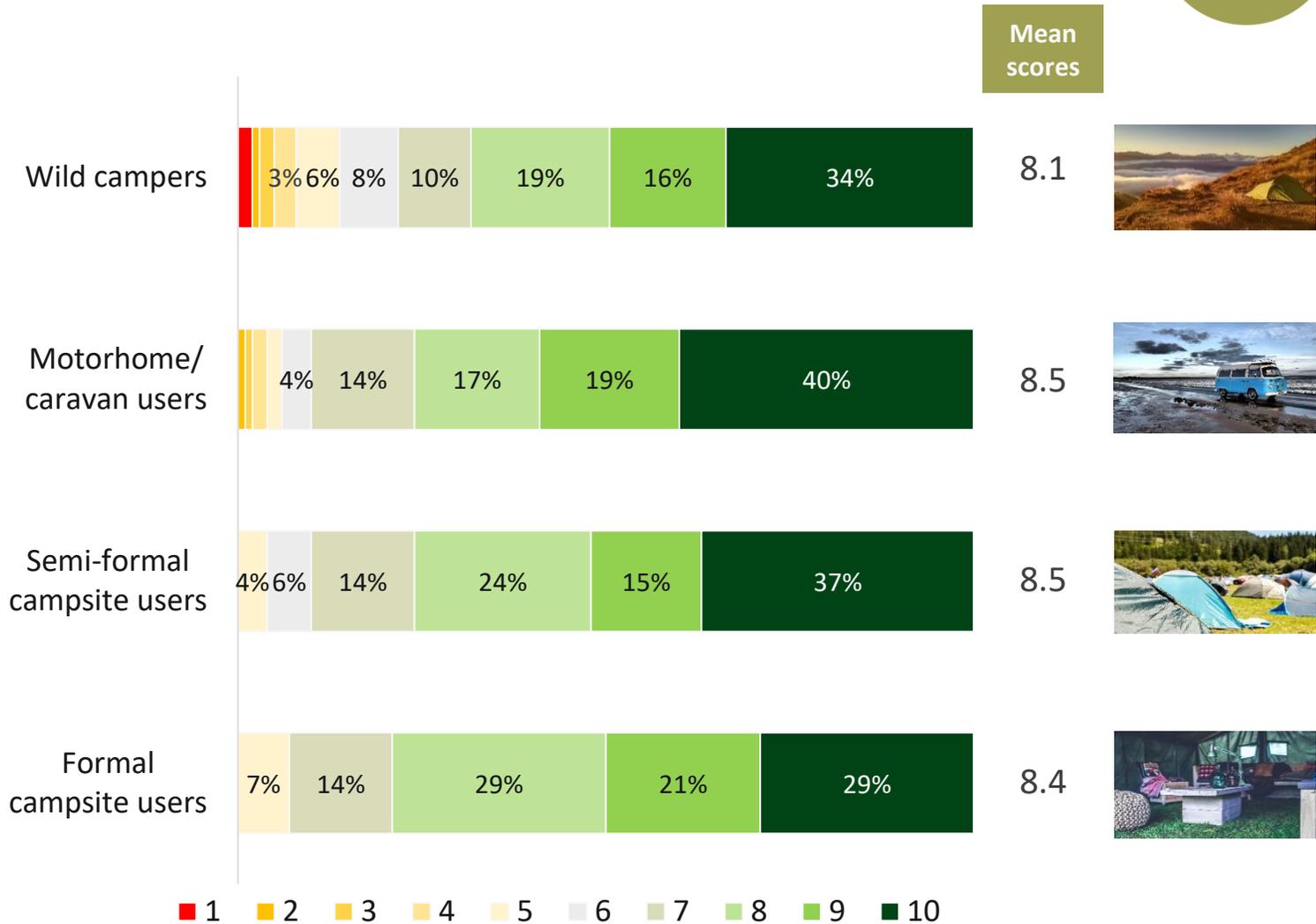


Camping experience

Rating the National Park

- Satisfaction is high across all sample profiles, with the majority of respondents providing scores of 8 to 10 in terms of their overall experience of camping in the National Park.

Ratings by type of facilities used



Q29: How would you rate the overall experience of camping in the National Park?

Bases: Wild campers 195, Caravan/motorhome users 81, Semi-formal campers 79, Formal campers 14

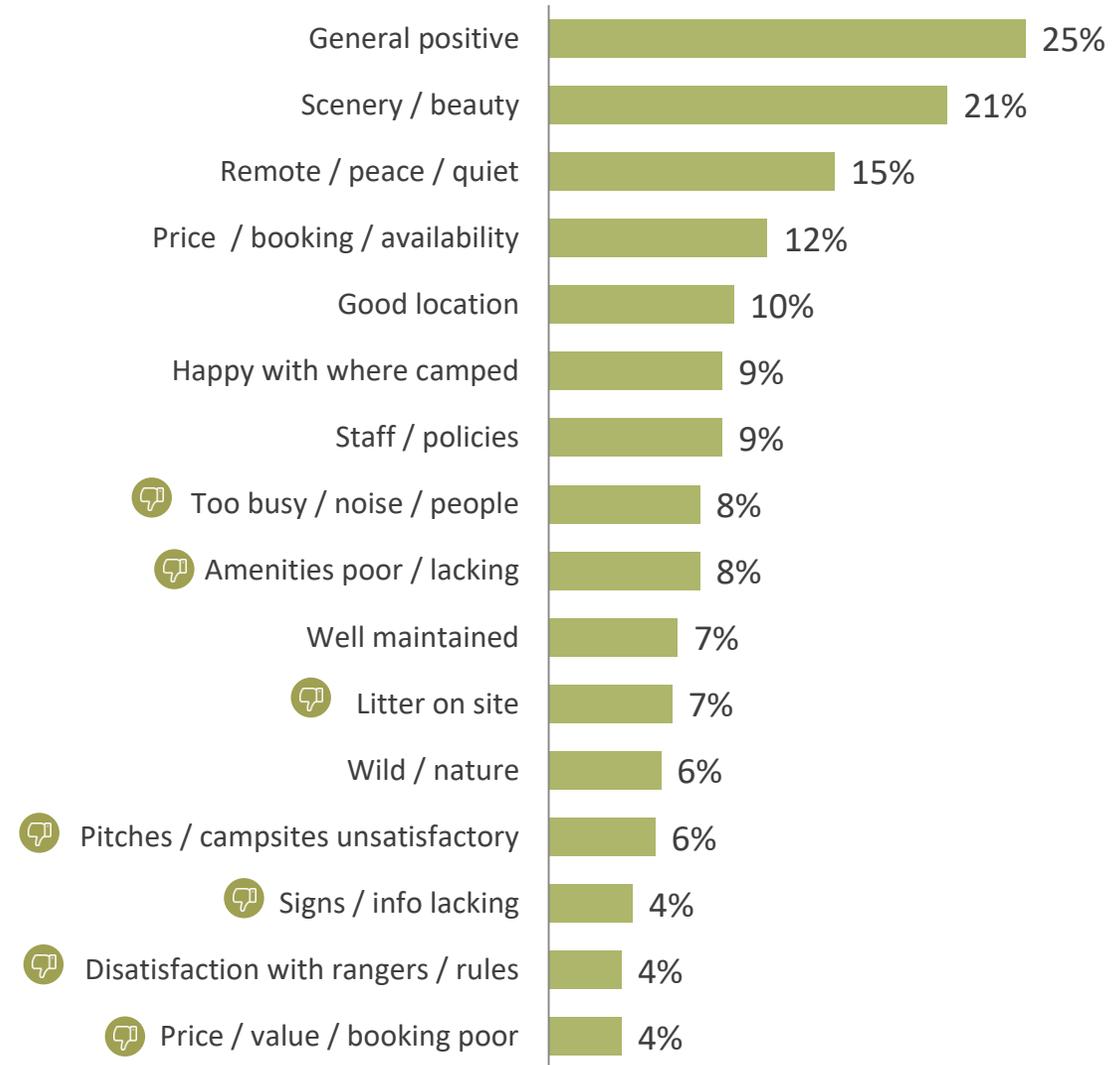


Camping experience

Rating the National Park

- Respondents were asked to say why they had chosen their rating score. Answers have been grouped by theme and responses from those who rated their experience positively (between 6 and 10 out of 10) are shown to the right.
- A quarter of comments were (or included), general positive feedback without highlighting anything specific.
- Scenery and the Park as a beautiful location were mentioned by one fifth of respondents, and the experience as remote/peaceful/quiet was also a common reason for rating experiences positively.
- It is important to note that even among those who rated the Park positively there are comments which relate to negative factors (marked with a 'thumbs down' on the chart). While these are not enough to mean campers view their overall experience in a negative light overall, there is an opportunity to further enhance and improve these factors to push scores even higher.

Reasons for satisfaction



Responses given by 3% or less of respondents are not shown

Q29: How would you rate the overall experience of camping in the National Park?
Q30: Why did you give that rating? OPEN ENDED



Camping experience

Reasons for satisfaction

Great place to park a motorhome, very little road noise. Nice loch-side walk for me and the dog. We are a bit unsure of wild camping but having the park permit made it feel safe. I think the permit is a great idea it should help to make sure people leave no mess or rubbish as the park can check up who has stayed. No one can complain about the price - £3. First class value. We will be back.

Beautiful site to camp. Quiet and clean. Well maintained. Sense of security and privacy.

Never wild camped and the little area we camped in was a most wonderful experience, camping right by the shore of Loch Lomond. Easily booked and friendly rangers.

Camping experience

Reasons for dissatisfaction

- 34 people rated their overall experience at LLTNP between 1 and 5. Comments given to explain ratings of 1-5 were that locations were too busy or noisy (14 comments), dissatisfaction with the quality of pitches or campsites (11 comments), comments about litter in the Park (7), comments about poor amenities (6) and dissatisfaction with value/cost or booking process (6).
- Comments on all these aspects also featured in responses for people who rated the Park more than 5 out of 10.

Comments related to:	No.
Too busy / noisy / too many people	14
Poor pitches / campsites	11
Litter	7
Poor amenities	6
Price / value / booking poor	6
Too muddy / swampy	4
Unhappy with rangers or Park regulations	4
Lack of rangers	4

Site muddy, dirty. Old bonfires and glass on ground, difficult to work out if you were in the correct zone.....

The bays allocated for our motor home were too sloping for a decent sleeping experience.

It was far too busy for me, for wild camping. As I hadn't been before, I didn't realise how many people would be camping there.

Camping experience

Rating the National Park

- 90% of respondents said they felt quite or very safe camping in the Park and no-one surveyed felt **very** unsafe.
- All those staying in a formal campsite felt quite or very safe and 97% of visitors from outside the UK felt quite or very safe.
- 12 people said they felt quite unsafe and were asked what made them feel this way:
 - 4 comments included feeling isolated
 - 4 mentioned a lack of security
 - 3 mentioned noisy people nearby and
 - 3 mentioned anti-social behaviourThere were also 2 comments each for - poor mobile reception, people drinking, youths and suspicious behaviour.

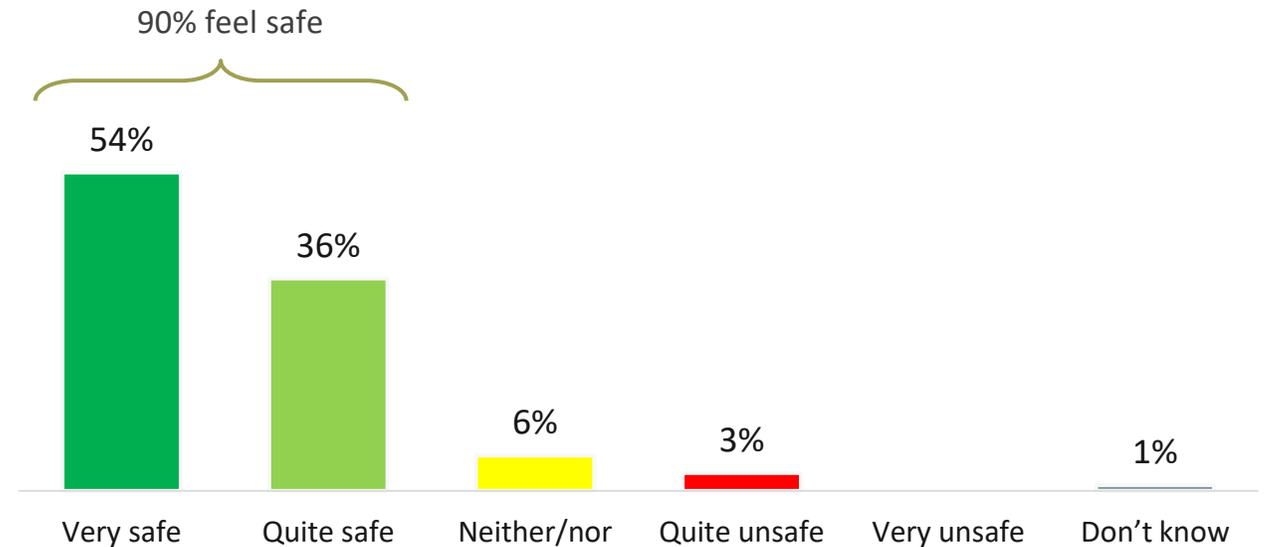
Due to being remote. Bad mobile reception or access in case of medical emergency. Slept with 1 eye open to keep in check with noisy group next to me.

There were very few people camping at the time we were there, and, as I was alone with my daughter, we did feel a little isolated at night when the staff left the campsite.

Feeling safe



Mean Score: 4.4



On average (mean score) respondents scored feeling safe at the Park 4.4 out of 5 (where 1 is very unsafe and 5 is very safe).

Camping experience

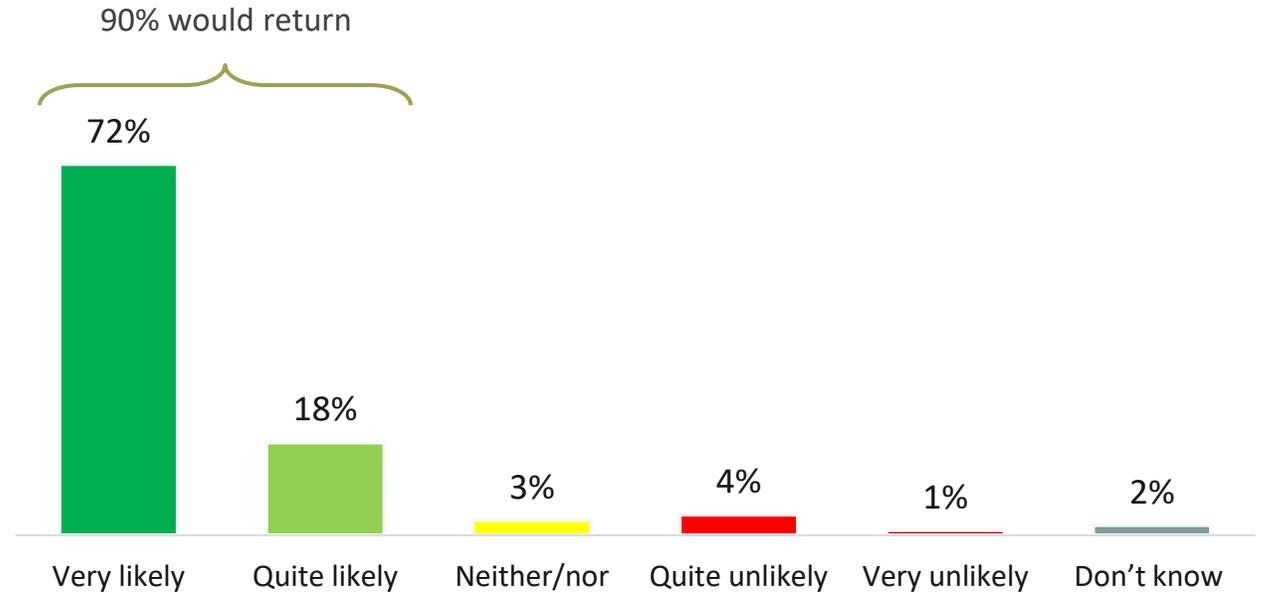
Rating the National Park

- In keeping with the high levels of satisfaction recorded, almost three quarters of respondents said they were very likely to return to the National Park.
- Frequent campers – those who generally go camping (at any location) 7+ times a year – were likely less likely to say they would be ‘very’ or ‘quite’ likely to return (86%) compared to more occasional campers (those who generally camp less than 3 times a year), of whom 95% would return.
- 35-44 year olds were the least likely to say they would be ‘very likely’ to return (61%, which compares to 81% of campers in the 25-34 age range).

Likelihood to return



Mean Score: 4.6



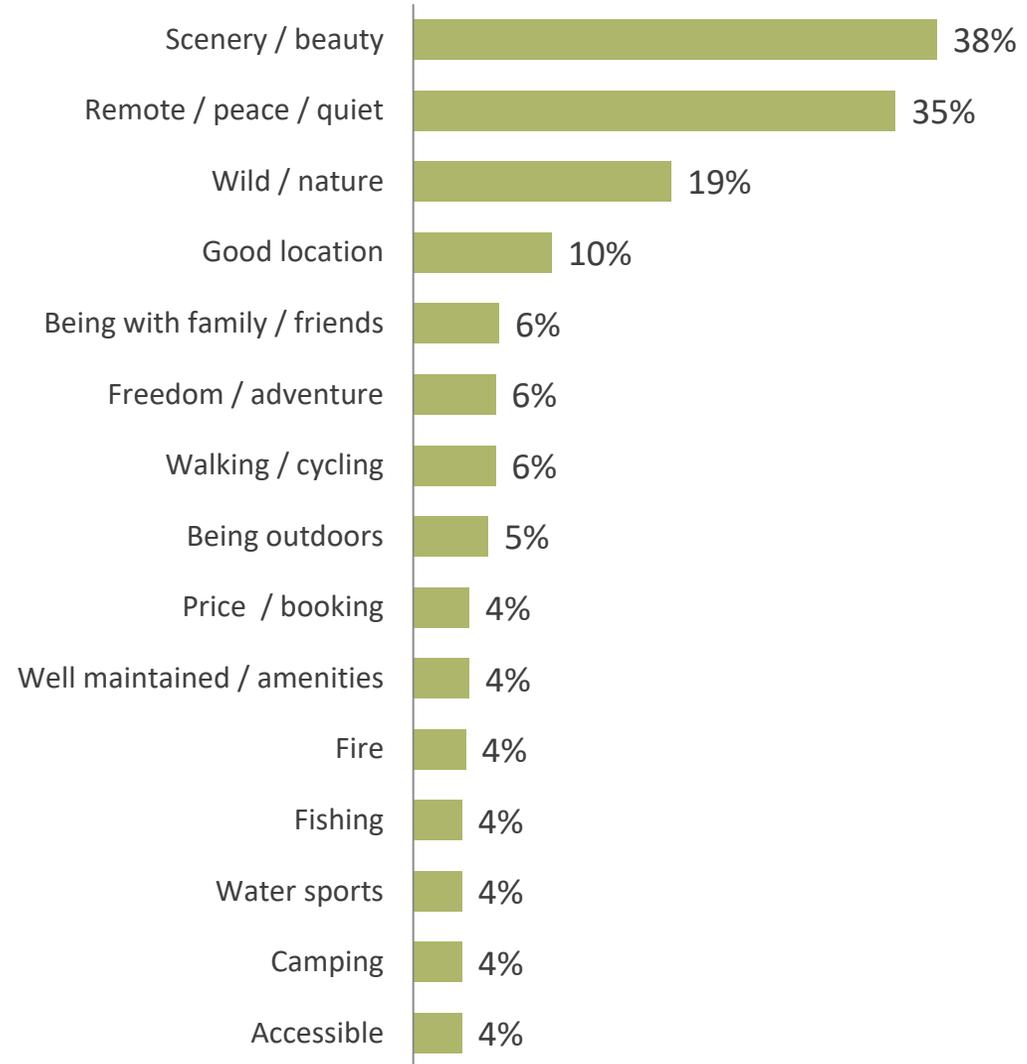
On average (mean score) respondents scored likelihood to return 4.6 out of 5 (where 1 is very unlikely and 5 is very likely).

Camping experience

Rating the National Park

- Scenery/beauty and the LLTNP as remote/peaceful/quiet were mentioned as favourite aspects of camping at the Park by over a third of respondents each.
- Both aspects are central themes throughout findings:
 - Peace and quiet was selected as a reason for choosing to camp/go caravanning (rather than choose another accommodation option) by more than half of the sample (51%).
 - Scenery/beauty and peace/quiet/remoteness both featured in comments on camping location choice and were among the top 5 most commonly mentioned factors in decision making on this (scenery/beauty was mentioned in 19% of comments and remoteness/ peace/quiet in 12%).
 - Peace and quiet was a top 3 influencing factor in choosing accommodation options within the Park for wild campers (59%), motorhome/campervan users (49%) and semi-formal campsite users (42%).
 - Scenery/beauty featured in 21% of comments on reasons for rating the Park positively and peace/quiet/remoteness in 15%.
- These elements are key factors in campers' experiences of the Park and have considerable importance in decision making. Communicating these aspects of the Park effectively may be a route to increasing visitor numbers.

Favourite aspects



Responses given by 3% or less of respondents are not shown

Q34: What did you enjoy most about camping in the Park? OPEN ENDED



Camping experience

Favourite aspects



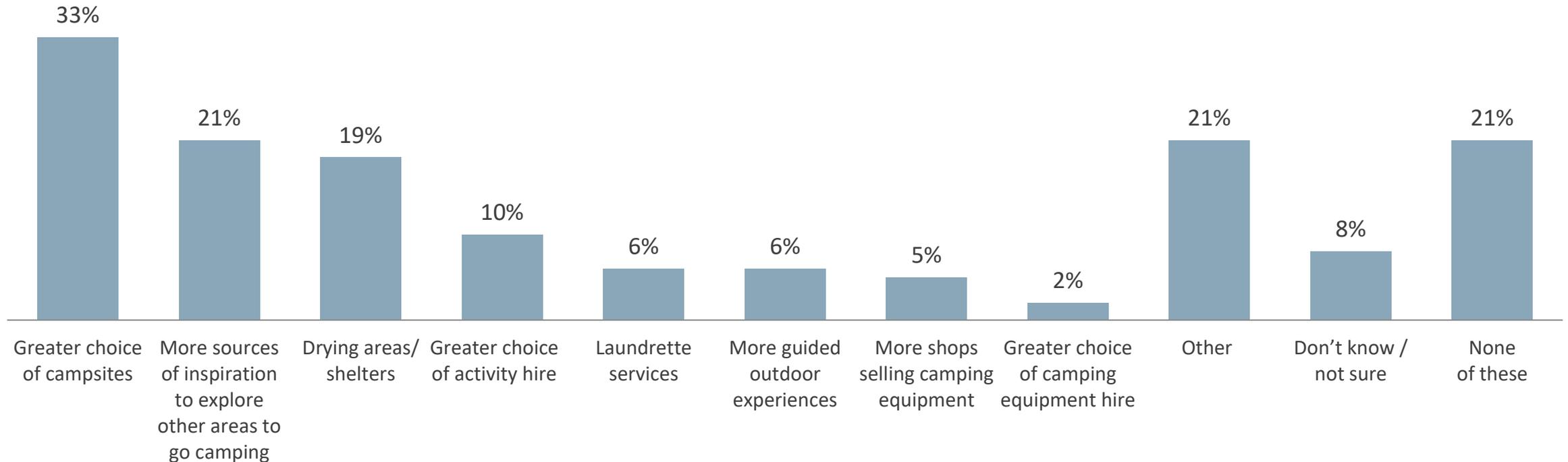
Having access to the most beautiful and wild scenery in the world. Also feeling safe knowing rangers were around to ensure park was being used appropriately by all.

The views and peace and quiet. The whole experience.

The area is just breathtakingly beautiful and we loved being able to walk, cycle, kayak and paddle board from the motorhome sites we booked. It's just perfect .

Camping experience

Improvements



- Over 70% of the sample selected at least one element that could improve the Park. Visitors welcomed the prospect of increased camping options (33%) and more information about other camping areas (21%).
- 77 people left comments for 'other' improvements, 18 of which were requests for toilets, 16 for water taps and 13 each for toilet waste disposal facilities and for more bins/better litter removal. There were 8 comments that the Park could be better policed (to discourage anti-social behaviour/littering etc.), 6 requests for better signage or information within the Park and 5 requests for permit zones to be expanded. A range of other suggestions were made by 4 or less respondents each and included requests for specific facilities (showers/campervan service points/electricity points/parking/BBQs/firewood/a shop) and improved maintenance/pitch improvements.

Conclusions and recommendations



Conclusions & recommendations



Profile of campers

- Survey respondents were 64% male and 35% female and predominantly aged between 25 and 64 (89%). Just under three quarters worked (either full time: 63%, or part time: 11%) and 15% were retired. More than half lived in Scotland (56%), 36% in other areas of the UK (primarily England) and 9% were from outside the UK.
- On their last trip to the Park, most of those who completed the survey had wild camped (53%), while 22% of respondents had stayed in a campervan or motorhome in an area without facilities, 21% in a semi-formal campsite and 4% in a formal campsite. However, due to the sampling methods used it cannot be concluded that this reflects the profile of campers as a whole.
- Visitors surveyed included high numbers of regular campers (85% said they generally camp more than once a year) and a notable proportion who were solo camping on their last trip (15%), indicating a sample of experienced and confident campers.

Conclusions & recommendations



Planning and booking trips

- Visitors surveyed were likely to get information from LLTNP directly (73% used the website to find out about camping options) as well as to book directly with LLTNP.
- Levels of advance booking more than two months before a trip were low (2%), with almost half booking on the day or within a week of camping.
- In deciding to camp/go caravanning rather than use another accommodation options, 50% or more of respondents were motivated by being outside/close to nature, the peace and quiet offered by camping/caravanning and the sense of adventure.
- Visitors had camped in locations across the Park on their last trip, particularly Loch Lomond, Three Lochs Forest Drive and Loch Earn. Location choice was also influenced by wanting peace and quiet (12% of comments about choosing a location mentioned this), and by the scenery/beauty of the chosen location (19%). Practical considerations like being in the area/en route to another location (15%) or proximity to a particular Loch (12%) were also important.
- Within the Park, camping option choice was related to the level of facilities visitors were happy with for those in motorhomes/campervans, those at semi-formal or at formal campsites. Being close to nature and looking for peace and quiet was also a top three factor for the majority of visitors.
- The Park as scenic and beautiful, offering remoteness/peace/quiet and being close to nature were priorities across decision making, as well as being what campers said were their favourite aspects about their last camping trip at LLTNP. Messaging about these aspects is therefore likely to resonate with the group and visual depictions of camping areas will be particularly important in communicating these.

Conclusions & recommendations



Profile of camping trips

- Most respondents didn't only camp at LLTNP over the course of the year (only 41% said they typically camp at the Park more than once a year) and for many, overnight stays were also part of longer trips: on their last trip to the Park the average length of stay for campers surveyed was 1.9 nights, but the average length of their overall trip was 7.6 nights. Many campers then will have a good understanding of the type and quality of facilities offered at other camping/caravanning locations, including, for some, a direct comparison with these as part of the same trip – this makes it critical for LLTNP to compare well to these.
- The average group size for visitors when last camping at the Park was just under three people (2.9). Half were in a group with or including their partner/spouse, 31% were with other family members and 21% were with friends. Just over one quarter (27%) were camping in a group with children. Larger groups were more likely to be wild camping or at semi-formal campsites, including a mix of family groups and groups of friends.
- Activities undertaken during trips were most likely to be free activities based outdoors, which is in keeping with campers' priorities of scenic surroundings and being close to nature: walking (low level: 63% and high level: 35%), sightseeing/looking at scenery (54%), wildlife watching (32%) and photography (31%) were the most commonly cited; though 36% also said they had a picnic or BBQ on their last trip.

Conclusions & recommendations



Evaluation of camping experiences

- Experiences of camping in LLTNP were rated extremely positively: on average respondents rated their overall experience on their last camping trip 8.3 out of 10 and over a third rated it 10 out of 10.
- 90% of campers said they felt quite or very safe camping in the Park and 90% also said they would be likely to return. Comments about their favourite aspects centred around the beauty of the location, its remoteness and the peace and quiet and it offered.
- While satisfaction levels at the Park are high, comments made by respondents in explaining the reason for their satisfaction score ratings revealed opportunities for improvement. Negative aspects of the experience mentioned by respondents were most likely to be that it had been too busy or noisy, that amenities were lacking, that pitches or campsites were poor or comments about litter.
- Most respondents (70%) selected at least one additional element that they would like to see provided for campers, particularly increased camping options (33%), more information about other camping areas (21%) and drying areas/shelters (19%). In addition, respondents made suggestions echoing negative factors mentioned in their comments – notably, improved amenities (including toilets, water taps and waste disposal facilities) and reducing litter through more bins and better policing of the area.
- Campers surveyed included a range of those camping in family groups, groups of friends, those intending to do long hikes across large geographic areas and others more likely to spend time doing activities around their camping location. While these groups have many shared priorities there may in some cases be incompatibility in camping alongside each other and offering designated 'quiet' zones or family camping areas could be a route to ensuring campers can select the precise type of experience they want.

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Technical appendix

Quantitative



Data collection

- The data was collected through a self completion online questionnaire.
- The target group for this research study was visitors to the National Park who had visited during 2017 or 2018 (up to October 2018).
- There was no target sample size
- The survey was in field between 4th December 2017 and 18th October 2018.
- All persons with an email address on the sampling frame were invited to participate in the study and an open link to the survey was also distributed through Loch Lomond and Trossachs National Park and partner organisations' websites and social media platforms.
- Data gathered using self-completion methodologies are validated using the following techniques:
 1. Internet surveys using client lists use a cookie system to ensure that duplicate surveys are not submitted. These surveys can also use a password system to avoid duplicate surveys being submitted by individuals. The sample listing is also de-duplicated prior to the survey launch.
 2. Where some profiling information has been provided on the sample list, this is also checked off against responses where possible to validate the data.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

Data processing and analysis

- The final data set was not weighted
- The overall sample size of 369 provides a dataset with a margin of error of between $\pm 1.02\%$ and $\pm 5.10\%$, calculated at the 95% confidence level (market research industry standard).
- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
- A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
- Where 'other' type questions are used, the responses to these are checked against the parent question for possible up-coding.
- Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
- A SNAP programme set up with the aim of providing the client with useable and comprehensive data. Crossbreaks are discussed with the client in order to ensure that all information needs are met.
- None of this project was sub-contracted.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

Technical appendix

Qualitative

- The data was collected by tele-depth interviewing.
- The target group for this research study was campers at the National Park.
- The sampling frame used for this study was 86 participants from the online survey who agreed to further research contact.
- Respondents were recruited by telephone by Progressive's skilled in-house team of qualitative recruiters. These recruiters worked to predetermined quota controls to ensure that the final sample reflected the requirements of the project to recruit a mix of visitors who had used different camping facilities (wild camping/motorhomes or caravans somewhere without facilities, semi-formal campsite users and formal campsite users) . All respondents were screened to ensure that they had not participated in a group discussion or depth interview relating to a similar subject in the 6 months prior to recruitment.
- An incentive of £15 compensated respondents for their time and encouraged a positive response.
- In total, 4 moderators were involved in the fieldwork for this project.
- Each recruiter's work is validated as per the requirements of the international standard ISO 20252. Therefore, all respondents were subject to validation, either between recruitment and the date of the group discussion/depth interview, or on the day of the group discussion/depth interview. Validation involved respondents completing a short questionnaire asking pertinent profile questions and checking that they have not participated in similar research in the past 6 months.
- It should be noted that, due to the small sample sizes involved and the methods of respondent selection, qualitative research findings do not provide statistically robust data. This type of research does however, facilitate valid and extremely valuable consumer insight and understanding.
- None of the work for this project was sub-contracted.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

Progressive's services



Core qualitative techniques
A full range of qualitative research methods



Language and behaviour
Gets communications right in tone and content



Mobile ethnography
Captures real consumer behaviour in real time



The View on Scotland
Glasgow city centre viewing facility provides comfort convenience and first class facilities



Brand mapping
Discovers core brand values, benchmarks and maps progress



Core quantitative techniques
A full range of quantitative research methods



Progressive Scottish Opinion
Offers fast and inexpensive access to over 1,000 Scottish consumers



Progressive Business Panel
Takes soundings from companies across Scotland quickly and efficiently



Field and tab
Bespoke stand alone field and tab services for qualitative and quantitative methods



Data services
We have a wide range of analytical services