



Loch Lomond & the Trossachs National Park Waterbus Survey 2015 Topline Results

November 2015

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Background

- Loch Lomond and the Trossachs National Park (LLTNP) is a destination for visitors from far and wide thanks to its variety of activities, attractions, visitor centres, and facilities.
- Visitors can explore the Park through a number of walking and cycling routes, e.g. the West Highland Way, Rob Roy Way, John Muir Way, and the National Cycle Network. Visitors can also enjoy a trip on the West Highland Railway Line, one of Europe's most scenic rail trips.
- In addition to these travel options, visitors can make use of the Park's Waterbus service to experience different locations around the loch itself.
 - In recent years, the Waterbus service has rapidly established itself as a way for visitors to experience different locations around the loch, linking west, east and south shore locations.
 - There are 9 routes available, most of which run April – November and vary in ticket price.
 - The services are run by 4 operators: Sweeney's Cruises, Cruise Loch Lomond, Ardlui Hotel, and SS Sir Walter Scott.

Research objectives

In order to capture details of those using the Waterbus service and determine the experience they have had, Progressive was commissioned to:

conduct a survey of visitors to the Park using the Waterbus services.



The four specific objectives of this study were to:

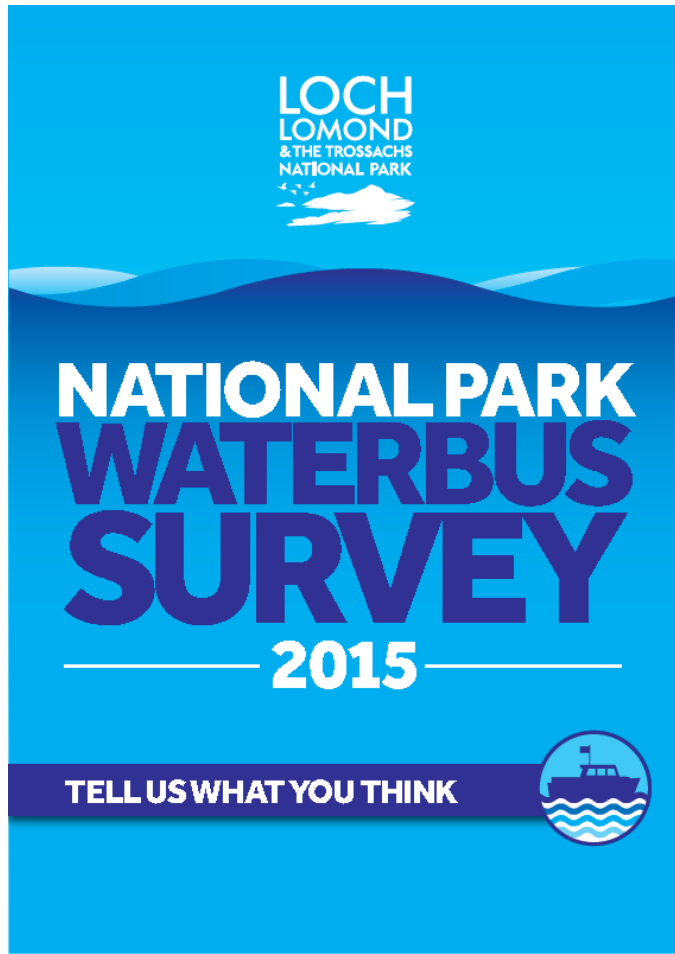
1. Determine the profile of those who use the Waterbus
2. Understand which routes are currently used
3. Establish user experience
4. Establish user perception of service

Method

- A quantitative method of data collection was adopted
 - Visitor details were captured using self-completion survey cards
 - Cards and survey collection boxes were made available onboard each route
 - Completed cards were securely stored in collection boxes and couriered to Progressive's offices for data entry
- 9 sample points were used (i.e. 9 Waterbus routes)
- Fieldwork dates: 10 weeks from late August – end of October 2015
- Overall sample size: 210
 - The margin of error for the total sample is $\pm 1.35\%$ to $\pm 6.76\%$ calculated at the 95% confidence level. It should be noted that margins of error can only be calculated on random probability samples. As this sample was self-selecting, it is not a probability sample and the margin of error should be treated as indicative.
 - Because respondents to self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer, sampling cannot be strictly controlled and, in some cases, this can lead to the findings being skewed towards the views of those motivated to respond to the survey.
 - Bases vary throughout report due to “no replies” being excluded from the analysis.

Method

– Self-completion survey card (A5)



1) Is this your first time on the Waterbus? Yes No

2) Which route(s) did you use or intend to use on this visit to the National Park?

a. Route 1: Balloch – Luss – Balloch

b. Route 2: Luss – Balmaha – Luss

c. Route 3: Luss – Inchcailloch – Luss

d. Route 4: Luss – Rowardennan – Luss

e. Route 5: Tarbet – Rowardennan – Tarbet

f. Route 6: Tarbet – Inversnaid – Tarbet

g. Route 7: Inversnaid – Inveruglas – Tarbet

h. Route 8: Ardlui – Ardleish

i. Route 9: Loch Katrine services (tick routes that apply)

3) How many trips have you made on the Waterbus this visit?
1 2 3 4 5 More (A return journey = 2 trips)

4) How did you find out about the Waterbus?
Leaflet National Park website Visitor Information Centre Ranger
Word of mouth Local recommendation Signage Came across it
Other (please specify): _____

5) Are you on a day trip or overnight trip ?

6) How many are there in your group including yourself? Adults ___ Children ___

7) Where do you live?
Local area Other part of Scotland Other part of UK Overseas

8) How old are you?
16-24 25-34 35-44 45-54 55-59 60-64 65-74 75+

9) Are you? Male Female

10) How would you rate your Waterbus experience?
Excellent Good Average Poor Not sure
If Poor please tell us why: _____

11) How would you describe the Waterbus' value for money?
Excellent Good Average Poor Not sure

12) Did you combine your Waterbus trip with any of the following?
Short walk Long walk Bike ride Food & drink Train
On Demand Taxi Visitor attraction Canoeing

13) Did you use the Waterbus to get to/from the West Highland Way?
Yes No

14) How could your Waterbus experience be improved? _____

Date completed: _____ Thank you for completing the questions above

Sample – routes and operators

Route	Sample Achieved	%	Operators	Sample Achieved	%
ROUTE 1 – BALLOCH – LUSS – BALLOCH	23	11%	Sweeney's Cruises	56	27%
ROUTE 2 – LUSS – BALMAHA – LUSS	36	17%			
ROUTE 3 – LUSS – INCHCAILLOCH – LUSS	6	3%			
ROUTE 4 – ROWARDENNAN – LUSS – ROWARDENNAN	18	9%			
ROUTE 5 – TARBET – ROWARDENNAN – TARBET	10	5%			
ROUTE 6 – TARBET – INVERSNAID – TARBET	13	6%			
ROUTE 7 – INVERSNAID – INVERUGLAS	1	0.4%			
ROUTE 8 – ARDLUI – ARDLEISH	-	-	Ardlui Hotel	-	-
ROUTE 9 – LOCH KATRINE CRUISES	128	61%	SS Sir Walter Scott	128	61%

The sample is predominantly made up of passengers on Route 9 – operated by SS Sir Walter Scott – with 3/5 of respondents using the Loch Katrine services during their trip.

¼ of respondents travelled via Routes 1 and 2 operated by Sweeney's Cruises, and nearly 1/5 of respondents travelled via the routes operated by Cruise Loch Lomond (Routes 3-7).

No responses were received from passengers on Route 8 operated by the Ardlui Hotel.

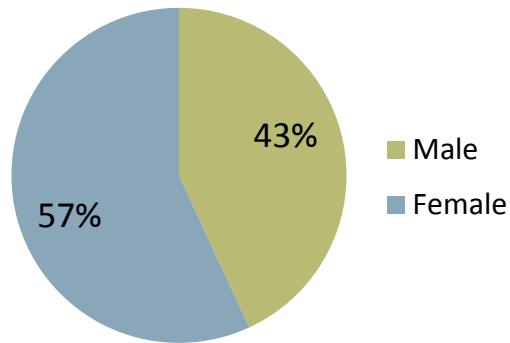


Visitor profiling



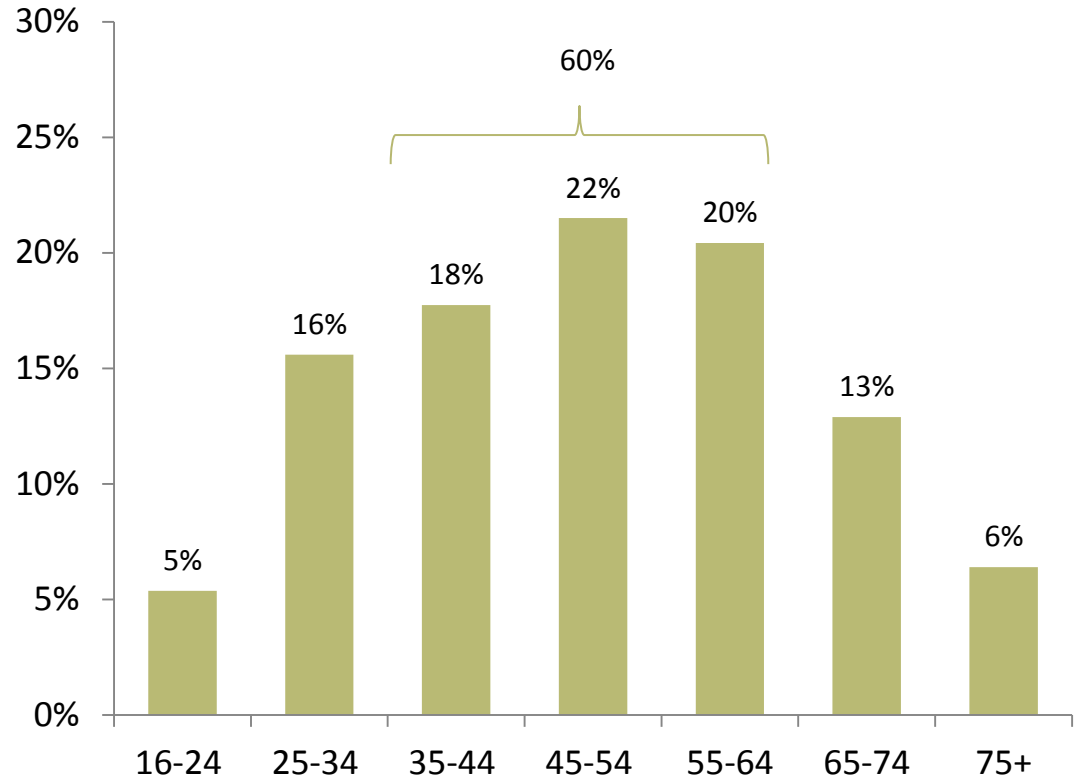
Gender and age

Gender



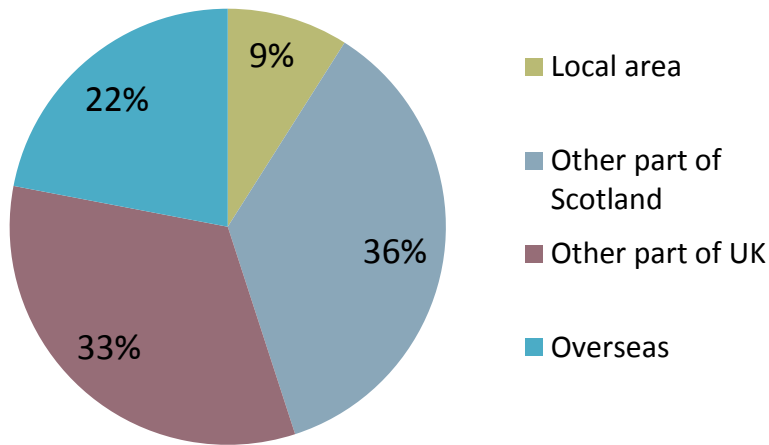
Sample shows a higher proportion of females than males, and a good spread of ages with a total of 60% between 35 and 64 years old.

Age

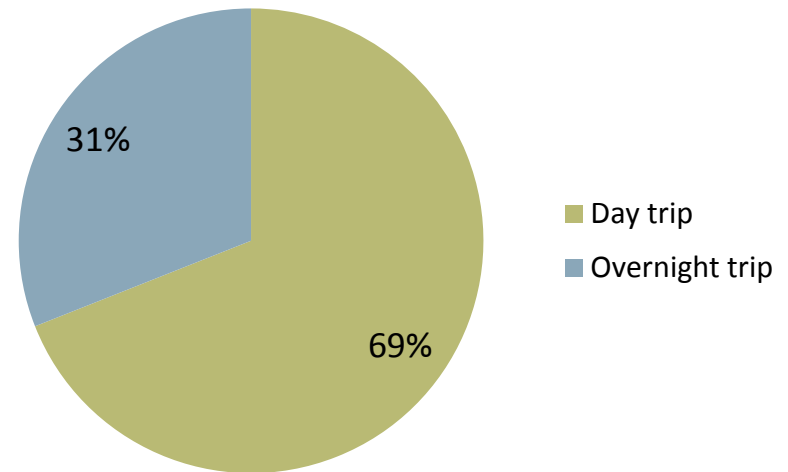


Residence and type of trip

Residence



Day vs. overnight trip

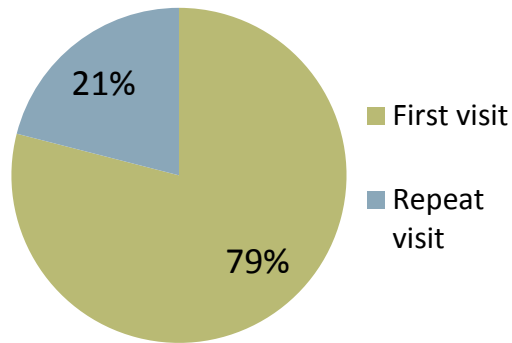


Results show that the Waterbus service is most popular amongst home-grown day trippers:

- Scottish residents make up nearly half (45%) of our sample, with 1/3 visiting from elsewhere in the UK and 22% from overseas.
- 2/3 of respondents were on a day trip vs. 1/3 on an overnight trip.

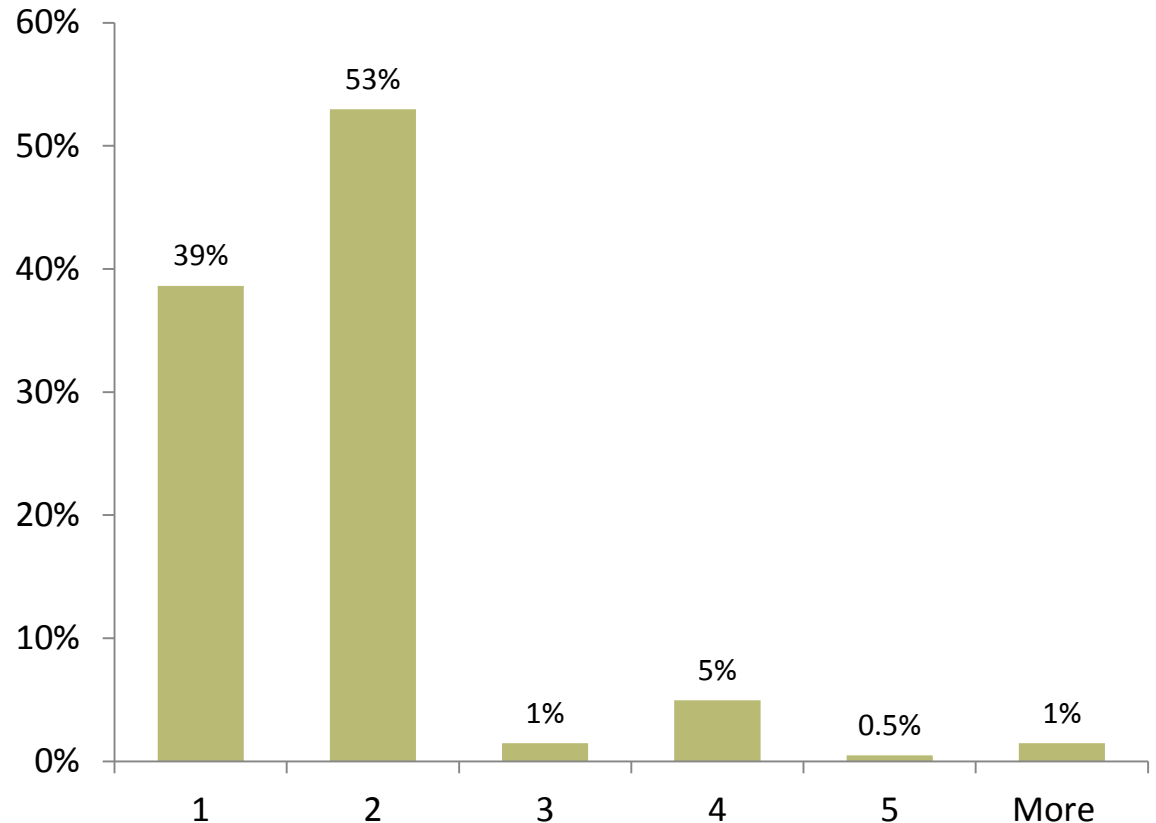
Number of trips made

First/Repeat visit



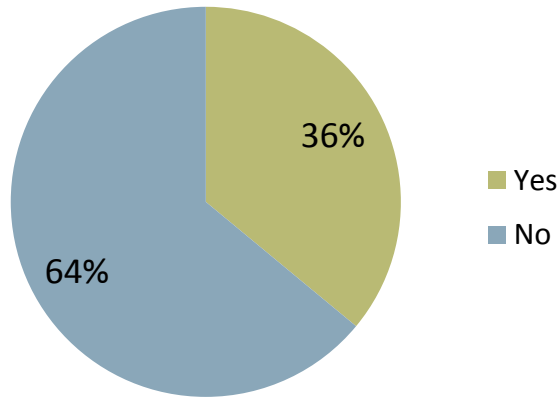
Most of those travelling on the Waterbus were doing so for the first time, and making either a single (39%) or a return journey (53%). Very few made more than 2 trips during their visit.

How many trips made



Group makeup

Children in party



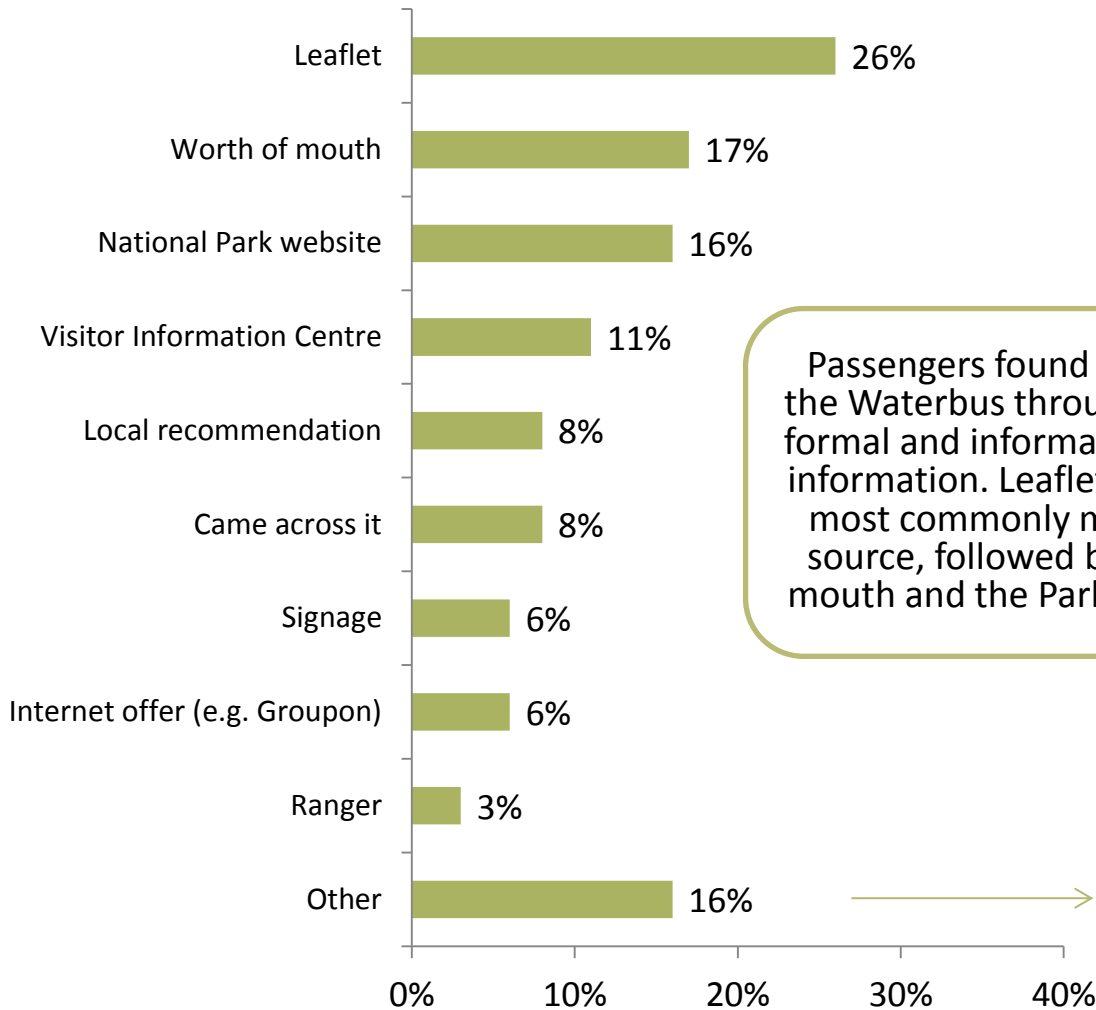
Number in party	Avg
Average number of adults	4.2
Average number of children	2.0
Average group size	5.0

Approximately 1/3 of passengers were visiting with children. This is reflected in the average numbers of adults and children visiting, suggesting that the Waterbus services are popular amongst groups of adults as well as family groups.

Main Findings



Sources of information

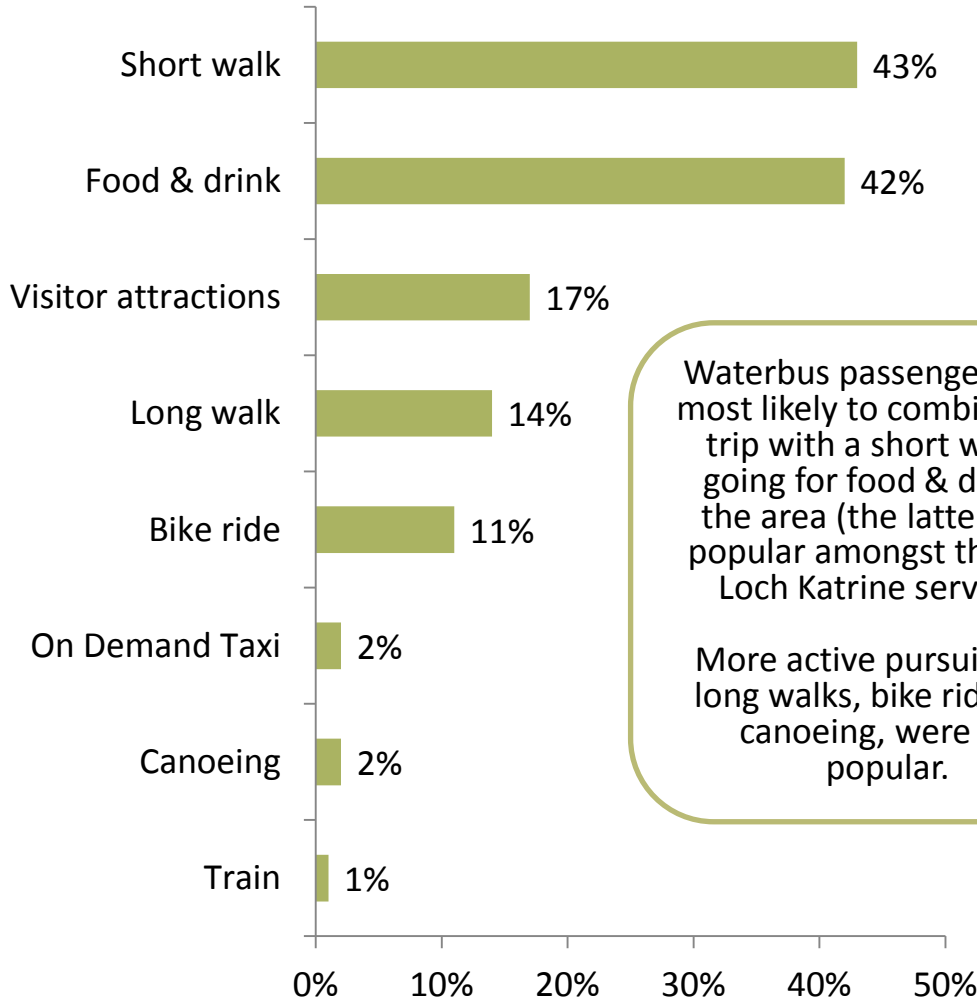


Passengers found out about the Waterbus through a mix of formal and informal sources of information. Leaflets were the most commonly mentioned source, followed by word of mouth and the Park's website.



- Other sources mentioned:
- Previous visit/regular visitor/ always known about it
 - Internet/website
 - Advert in booklet/newspaper
 - Tour/tour guide
 - Lonely Planet
 - Friend/family

Activities undertaken

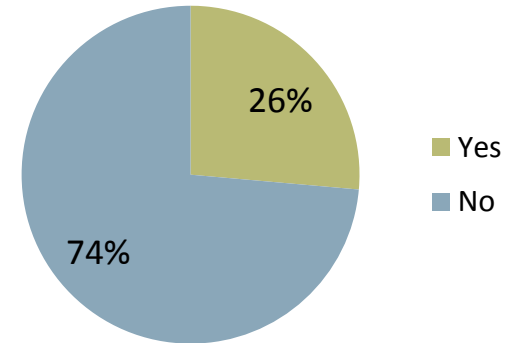


Waterbus passengers were most likely to combine their trip with a short walk or going for food & drink in the area (the latter most popular amongst those on Loch Katrine services).

More active pursuits, e.g. long walks, bike rides and canoeing, were less popular.

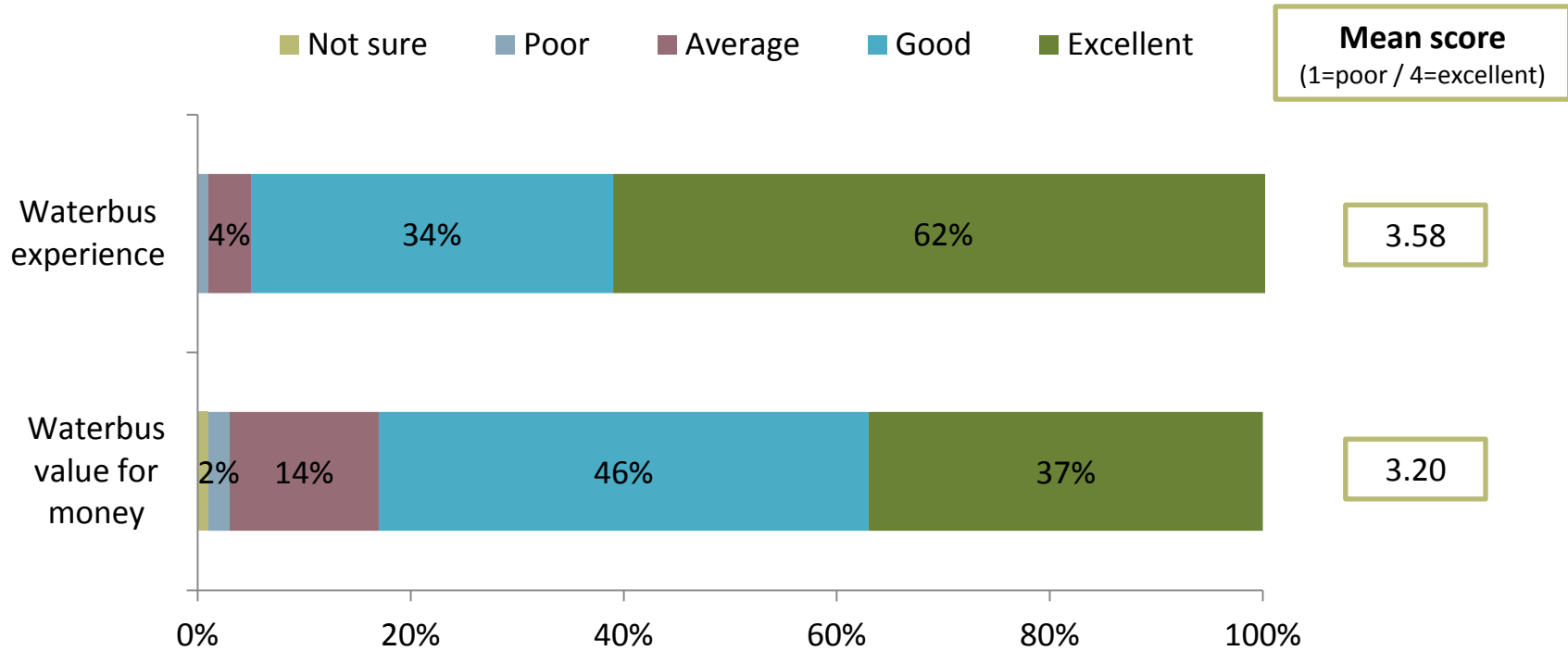


Used Waterbus to get to/from WHW



¼ of passengers (excluding those travelling on Route 9 only) used the Waterbus to get to/from the West Highland Way.

Rating of Waterbus



Very high ratings of overall Waterbus experience: 96% rated either good or excellent. UK residents gave higher ratings of their experience than overseas residents. Value for money was rated quite highly as well: 83% rated either good or excellent. Those on Cruise Loch Lomond services rated the Waterbus' value for money higher than those on other operators' services.

Q10. How would you rate your Waterbus experience?

Base (All): 200

Q11. How would you describe the Waterbus' value for money?

Base (All): 206

Suggestions for improvement

Comment	%
Nothing / don't know / n/a	32%
General positive comment	17%
Improved speakers/louder	17%
Weather	6%
Food/drink	6%
Comfier seats/backrests	3%
Cheaper	3%
Better signposting/more info	3%
More stops/more often	2%
Heaters/blankets	2%
Toilets	2%
More frequent service	1%

49%

When asked how the Waterbus experience could be improved, half either could not offer a suggestion or made a general positive comment.

I don't think it needs to be improved – it is excellent.

The remainder suggested a range of improvements, with better/louder speakers being the main priority.

If the speakers downstairs could be a little louder – we did struggle to hear at times.

Be able to buy sandwiches.

More comfy seats.

Heaters, toilets

Have them run more often.

Price was shockingly expensive as it was hour journey each way.

Map of islands with route to follow on wall.

Summary and conclusions



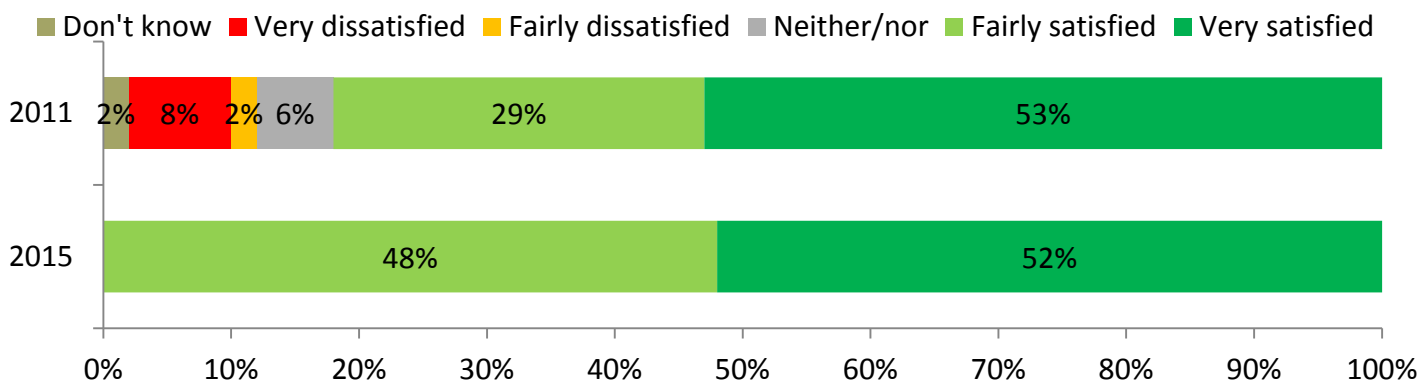
Summary & Conclusions

- Total of 210 responses to the survey were received with representation from 8 of the 9 Waterbus routes, and 3 of the 4 operators.
 - Sample is predominantly made up of passengers on Route 9 (Loch Katrine services), run by SS Sir Walter Scott.
- Demographic profile shows that Waterbus passengers were:
 - most likely to be aged 35-64 and from Scotland
 - most likely on a day trip to the area and using the Waterbus for the first time
 - more likely to visit without children; however, 1/3 passengers were visiting with children, suggesting that services are popular amongst groups of adults as well as family groups.
- Passengers found out about the Waterbus from a range of sources, with leaflets being the most commonly mentioned source of information, followed by word of mouth and the Park's website.
 - Both formal and informal sources of information are serving as promotion for the Waterbus.
- Leisurely activities such as going for short walks or for food & drink were popular, with 6 out of 7 passengers doing one or both of these activities during their visit to the Park. Using the Waterbus to get to/from the West Highland Way was less popular, but still done by ¼ of respondents.
- The majority of passengers were very satisfied with the Waterbus service.
 - Passengers rated their overall Waterbus experience very highly, with 96% rating it either good or excellent. Passengers were less positive in their rating of the Waterbus' value for money; however, this was still quite highly rated, with 83% rating it either good or excellent.
 - Many could not offer any suggestions for improvement, reflecting their satisfaction with the current offering of the Waterbus service. The main priority highlighted by those that did make a suggestion was to improve the speaker system on board.

Appendix: from LTNP Visitor Survey 2015/16

Satisfaction with and likelihood to re-use Waterbus

5% of the 2015 sample (13 respondents) reported that they had used the Waterbus.

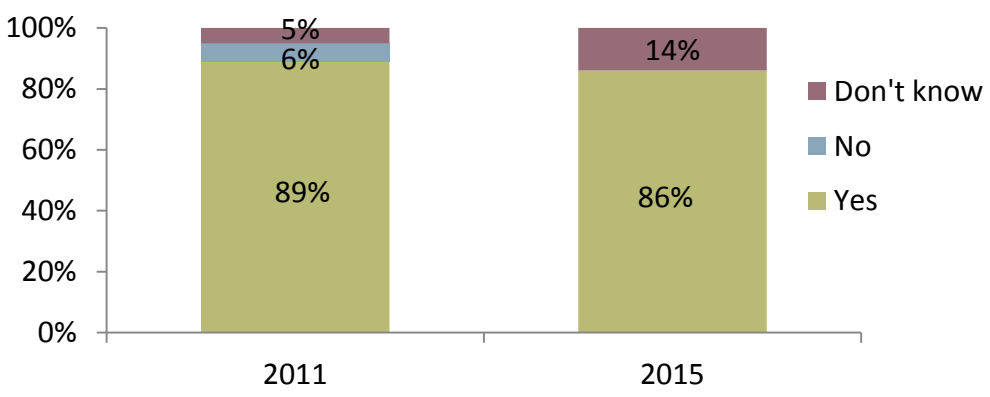


Mean score
(1=v. disat / 5=v. sat)

4.20

4.52

Likely to use Waterbus again



There was extremely high satisfaction with the Waterbus service in 2015: 100% were either fairly or very satisfied – an increase on 82% from 2011. However, this is not significant due to the low base size. High levels of satisfaction are reflected in the proportion of visitors that would be likely to use it again (86%).

Q12a. How satisfied were you with your trip on the Waterbus during your visit?

Q12b. Overall, do you think you would be likely to use the Waterbus services again?



Base (All who used Waterbus): 62 (2011), 13 (2015)

Base (All who used Waterbus): 62 (2011), 13 (2015)

Technical Appendix

Quantitative

Methodology:

- The data was collected by self-completion survey cards.
- The target group for this research study was Waterbus passengers.
- The target sample size was 1600, and the final achieved sample size was 210. The difference is due to a lower than expected level of participation from the operators to encourage passengers to complete cards.
- Fieldwork was undertaken between August and October 2015.
- The questionnaire took approximately 5 minutes to complete.
- Respondents to self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that sampling cannot be strictly controlled and, in some cases, can lead to the findings being skewed towards the views of those motivated to respond to the survey.
- Self-completion validation – data gathered using self-completion methodologies are validated using the following techniques:
 - Where a self-completion survey is returned anonymously there will not be any opportunity for validation. However, all questionnaire returned undergo rigorous editing and quality checks and any thought to be invalid are moved from further processing.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

Technical Appendix

Quantitative

Data Processing and Analysis:

- The overall sample size of 210 provides a dataset with an approximate margin of error of between $\pm 1.35\%$ to $\pm 6.76\%$, 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.
- For CAWI questionnaires these checks include:
 - Responses are checked for duplicates, where unidentified responses have been permitted.
 - All responses are checked for completeness and sense.
 - Depending on the requirements of the survey, and using our analysis package, SNAP, data is either imported from email responses received in a dedicated email inbox or stored directly on our dedicated server.
- A computer edit of the data is carried out prior to analysis, involving 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.

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