

progressive

Cairngorms National Park Authority

Visitor Survey 2019-20

Final Report

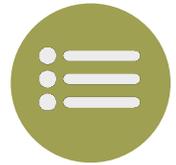
June 2020



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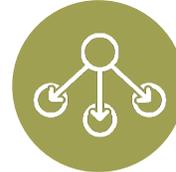
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Project background

The Cairngorms National Park was established in 2003 and is one of Scotland's two national parks (the other being Loch Lomond & The Trossachs National Park).

The National Park Authority co-ordinates the delivery of four statutory aims: to conserve and enhance the area's natural and cultural heritage; to promote the sustainable use of the area's natural resources; to promote understanding and enjoyment of the Park's special qualities; and to promote sustainable economic and social development of local communities.



To make sure these aims are met, the bodies responsible for the parks' management require information regarding visitor profile and behaviour, volumes of use, visitors' knowledge and attitudes, and the impacts of information provided to visitors.

Previous visitor surveys have been conducted within the National Park – in 2003/04, 2009/10 and 2014/15. This research was commissioned to continue to inform the sustainable management of the park through the 2019/20 Visitor Survey. This report provides data and analysis pertaining to the 11 months from May 2019 to March 2020.

Research objectives

The overall aim of the research was to understand visitors to the Cairngorms National Park in terms of their profile, visiting behaviour and visitor experience.

Specific research objectives were to:

1: Supply information about visitors and their type of visit, to guide future tourism policy and activity

2: Gather data which can be updated in future studies to enable changes to be tracked over time

3: Analyse and compare with previous Visitor Surveys and between the two national parks

4: Better understand visitors' experience and motivations segmented by demographic and protected characteristics

- The research data was gathered using face-to-face interviews conducted with visitors and residents at key points throughout the Cairngorms National Park. All visitors and residents who were interviewed were on a leisure trip at the time of the interview.
- Interviews were conducted using Computer Aided Personal Interviewing (CAPI) technology.
- The objective at the outset of the study was to gather data over 12 months – from May 2019 to April 2020. However, due to the coronavirus outbreak in 2020, interviewing had to be concluded in March 2020.
- All data within this report refers to the 11 month period from May 2019 to March 2020. Data for the 2014/15 wave of research has been adjusted to exclude April 2015 to ensure valid comparisons.
- The target sample for the year was 2,500. Across the 11 months 2,262 interviews were achieved. Sample size targets were set each month to ensure a representative spread across the year, with 40 sample points across the Park. The majority of sample points were matched to previous years, however, some new points were introduced in 2019/20 to reflect new attractions within the Park, e.g. Snow Roads locations.
- A random sampling approach was used (no quotas set) – to ensure accurate visitor profiling.
- Each interview lasted approximately 12 minutes.

Analysis

Statistical validity



- The margins of error associated with the data are detailed below. These are calculated at the 95% confidence interval (market research industry standard).

Sample type	Sample size	Margin of error
Total sample	2,262	+/- 0.41% to +/- 2.06%
Visitors	2,191	+/- 0.42% to +/- 2.09%
Residents	71	+/- 2.31% to +/- 11.61%

- Comparisons to 2014/15 data are based on 11 months – May 2014 to March 2015 – to ensure comparability to 2019/20.
- Only statistically significant differences are reported.
- Bases vary by question depending on routing.
- Where figures do not add to 100% this is due to multi-coded responses or rounding.
- In commentary where net figures are reported these may differ slightly from the added figures in the chart. This is due to rounding and using absolute figures to calculate nets.
- On some charts figures of <1% and 1% are not shown for ease of reading.
- Updates to the questionnaire in 2019 mean that direct comparisons to previous years are not possible for some questions. This is noted where relevant throughout the report.

Analysis

Sub-sample analysis



- The analysis detailed in this report includes highlighting statistically significant differences between sample sub-groups.
- These sub-groups are:
 - Season – Summer (Jun, Jul, Aug 2019); Autumn (Sept, Oct, Nov 2019); Winter (Dec 2019, Jan 2020, Feb 2020); Spring* (May 2019, March 2020)
 - Origin 1 – Scotland; rest of UK; all overseas
 - Origin 2 – Scotland; rest of UK; Europe; North America; other overseas
 - Gender – male; female
 - Age – 16-34; 35-44; 45-54; 55-64; 65+
 - Locations – Aberdeenshire; Glenmore; Badenoch; Strathspey; Moray; Aviemore; Atholl; Angus
- The sample sizes for each sub-group are detailed below:

Season	Base
Summer	1,260
Autumn	448
Winter	280
Spring	274

*Spring excludes April data – the Coronavirus outbreak meant no interviewing could take place in April 2020

Origin	Base
Scotland	1,132
Rest of UK	542
Europe	375
North America	120
Other overseas	93
All overseas	588

Demographics	Base
Male	1,182
Female	1,079
16 – 34	487
35 – 44	439
45 – 54	450
55 – 64	475
65+	411

Location	Base
Aberdeenshire	487
Glenmore	467
Badenoch	310
Strathspey	301
Moray	275
Aviemore	199
Atholl	115
Angus	108

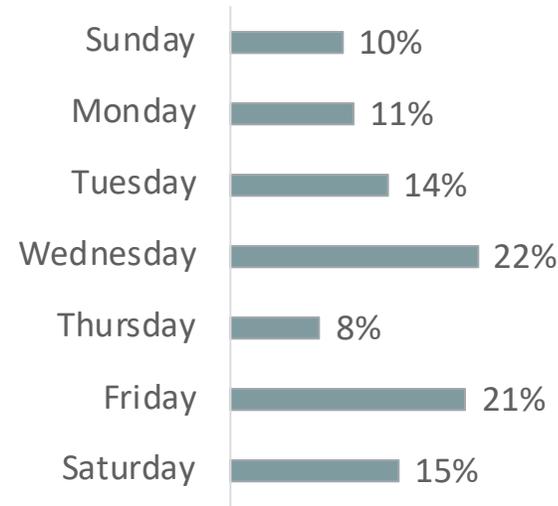
Sampling

Day and month

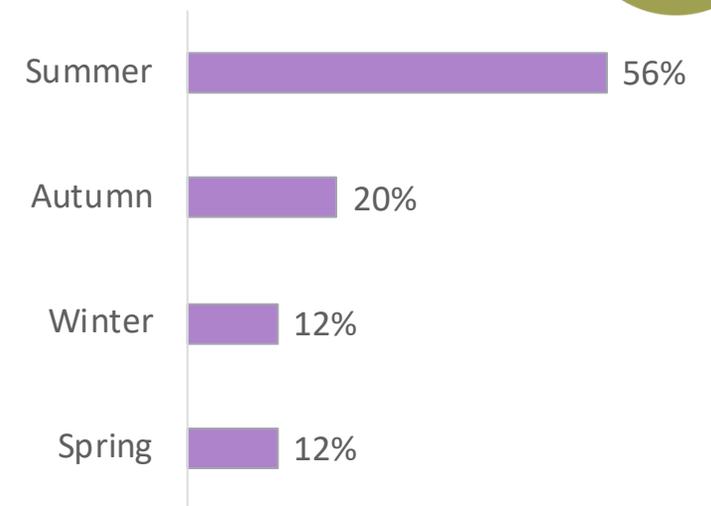
- Sampling was spread across days of the week and the months of the year.
- A sampling plan was prepared at the project outset to allocate interviewing across the 40 sampling points and across the months of the year. This plan broadly replicated the 2014/15 sample plan to ensure comparability of findings.
- The largest proportion of interviewing was conducted in the summer months of June, July and August (56%). The autumn months (September, October, November) accounted for one fifth of interviews and 12% were conducted in each winter (December, January, February) and spring (March, May).
- More interviews were conducted in summer in 2019/20 compared to 2014/15 (45%), with fewer conducted in winter (16% in 2014/15) and spring (17% in 2014/15).



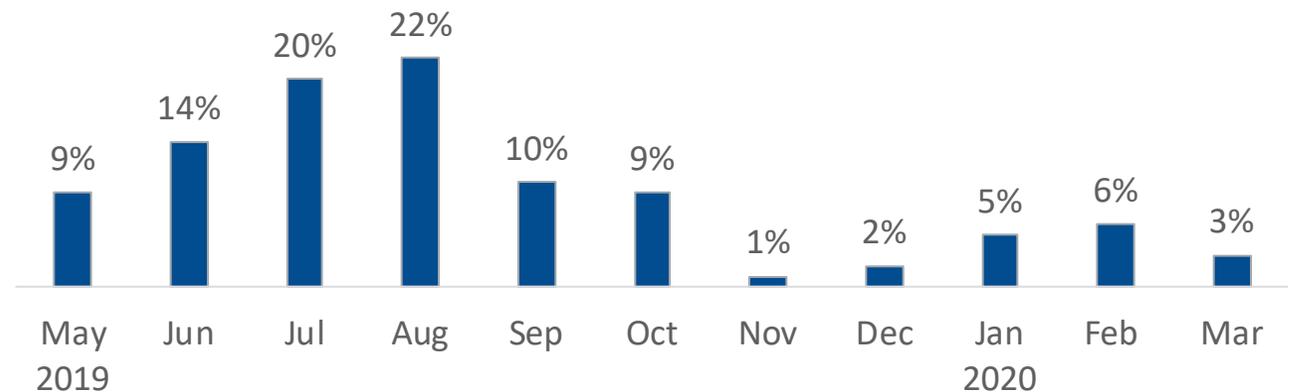
Weekday



Season



Month

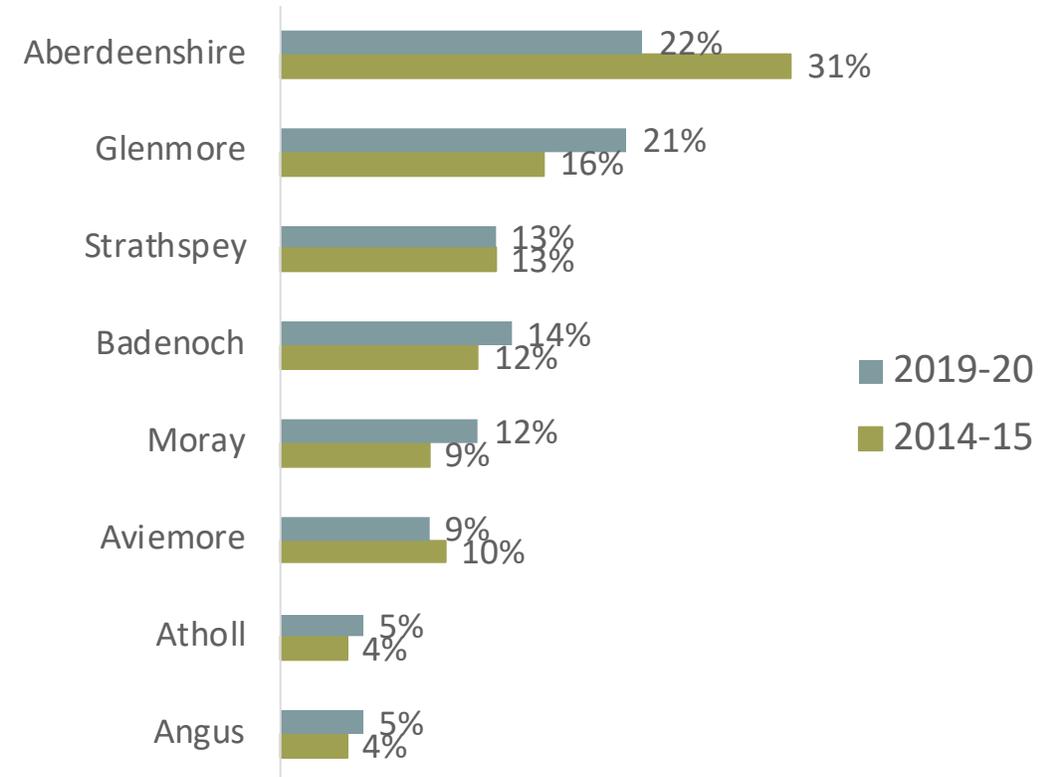


Base (All): 2,262

Sampling Locations

- The sample plan was also designed to ensure comparability to 2014/15 in terms of the areas where the interviewing was conducted.
- Just over a fifth of interviews were conducted in the Aberdeenshire and Glenmore areas of the Park, while 14% were conducted in Badenoch and 13% in Strathspey.
- More interviews were conducted in Glenmore and fewer in Aberdeenshire in 2019/20 than in 2014/15.
- A full breakdown of the individual sample points is detailed over.

Sampling point



Sampling Locations



Area	Sampling location	Number	%
Aviemore – 9%	Aviemore main street	199	9%
Glenmore – 21%	Rothiemurchus Car Park	80	4%
	Loch an Eilein	88	4%
	Loch Morlich/Glenmore Centre & Café	119	5%
	Cairngorm Ski Centre – car park at base station	145	6%
Atholl – 5%	Glenmore Road End	35	2%
	Blair Atholl – village square	39	2%
	Blair Castle	13	1%
	House of Bruar	25	1%
Badenoch – 14%	Killiecrankie	38	2%
	Laggan – near Pottery	25	1%
	Highland Folk Museum, Newtonmore	54	2%
	Kingussie – main street	68	3%
	Kincraig Highland Wildlife Park	66	3%
	Laggan – Wolftrax	35	2%
	Dalwhinnie Distillery	30	1%
	Uath Lochans	23	1%
	Achlean Road end	9	<1%
Angus – 5%	Glen Esk Car Park	46	2%
	Glen Doll/Clova Car Park	62	3%

Area	Sampling location	Number	%
Strathspey – 13%	Landmark Centre, Carrbridge	129	6%
	Speyside Heather Centre, Skye of Curr	43	2%
	Osprey Centre Car Park, Loch Garten	69	3%
	Grantown on Spey – main street	60	3%
Moray – 12%	Glenlivet Distillery Car Park	47	2%
	Tomintoul – village centre	82	4%
	Lecht Ski Area	61	3%
	Snow roads – Still	30	1%
Aberdeenshire – 22%	Snow roads – Watchers	55	2%
	Ballater – village centre/TIC	94	4%
	Loch Muick Car Park	41	2%
	Balmoral Car Park	47	2%
	Royal Lochnagar Distillery Car Park	22	1%
	Braemar – village centre	53	2%
	Linn of Dee Car Park	63	3%
	Glenshee	58	3%
	Burn O'Vat Car Park, Dinnet	43	2%
	Glen Tanar Car Park	41	2%
Strathdon	16	1%	
Snow roads – Connecting Contours	9	<1%	



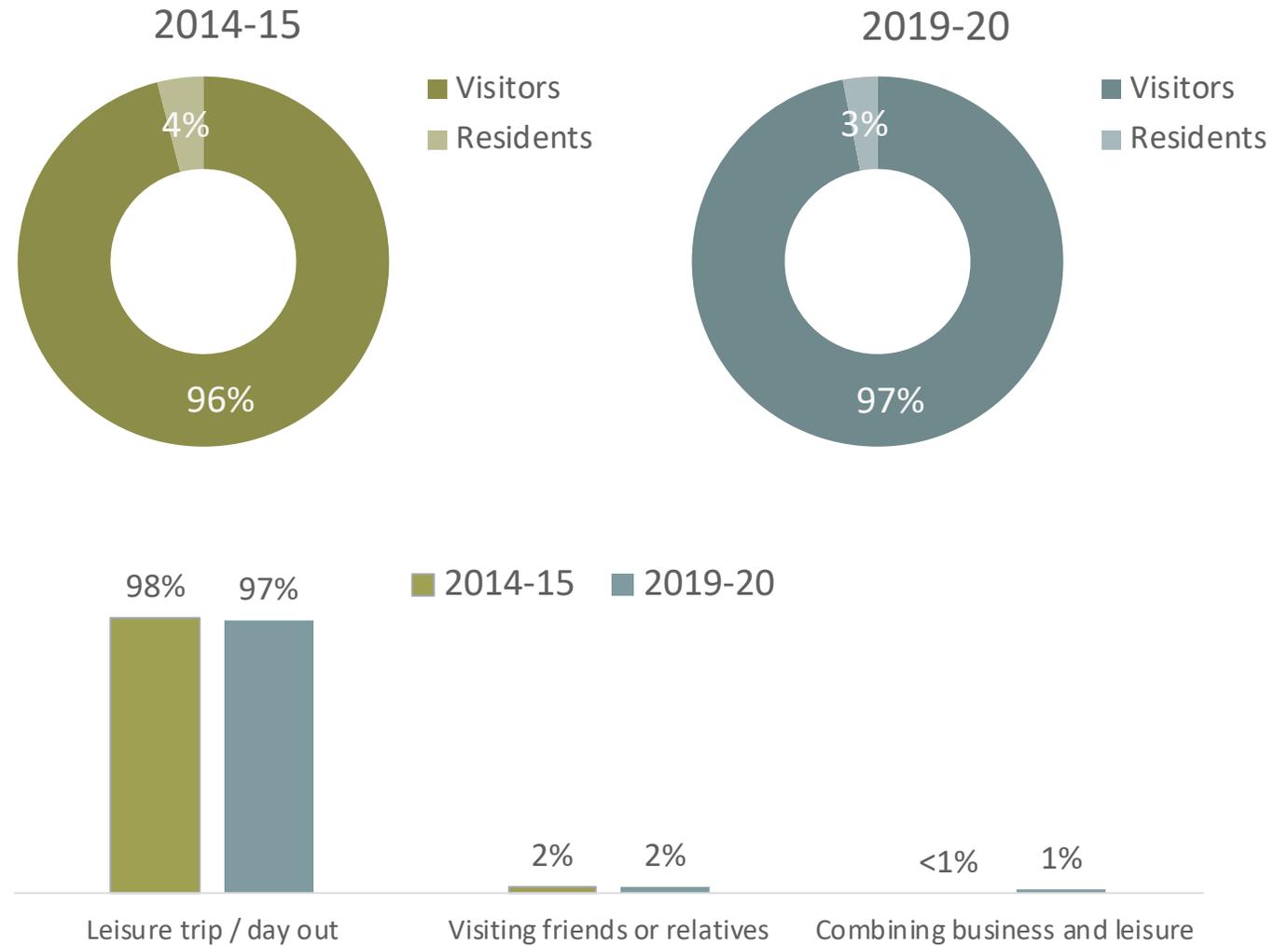
Visitor profile

Visitor profile

Visitors and residents

- The vast majority of respondents interviewed were visitors to Cairngorms National Park (97%). This corresponds to the data gathered in 2014/15 (96%).
- Similarly, the majority were on a leisure trip (97%) rather than visiting friends or relatives (2%) or combining business or leisure (1%). Again findings mirror those from 2014/15.
- It should be noted that anyone on a business trip or on personal business (such as shopping, visiting post office, etc.) was excluded from the sample.

Visitors vs residents



SQ2: During this interview I am going to refer to the area shown on this map as 'the Cairngorms area' or 'the area'. Do you live in this area?
 Q1. Which of these reasons best describes your reason for visiting the National Park today?

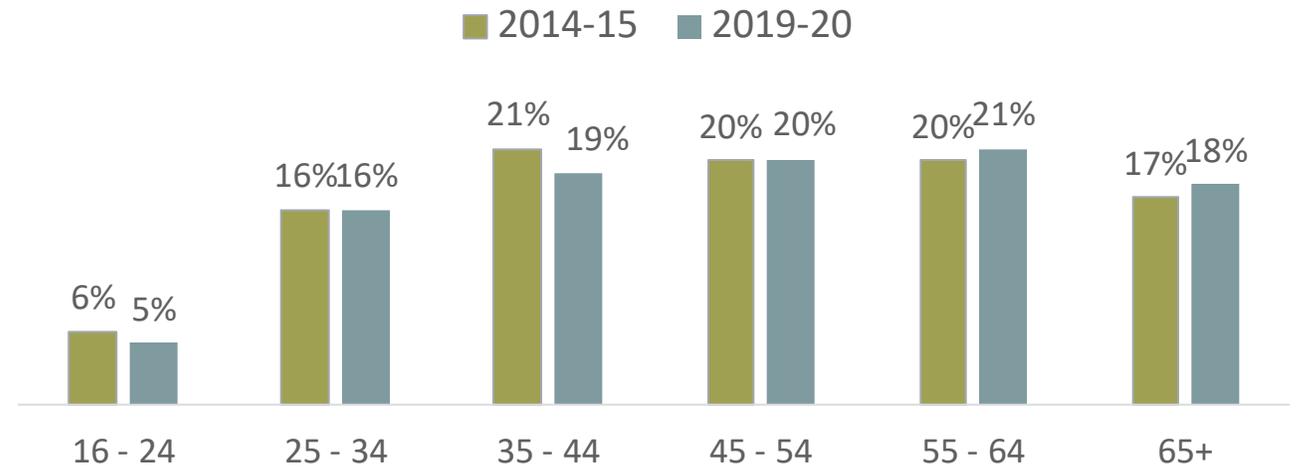
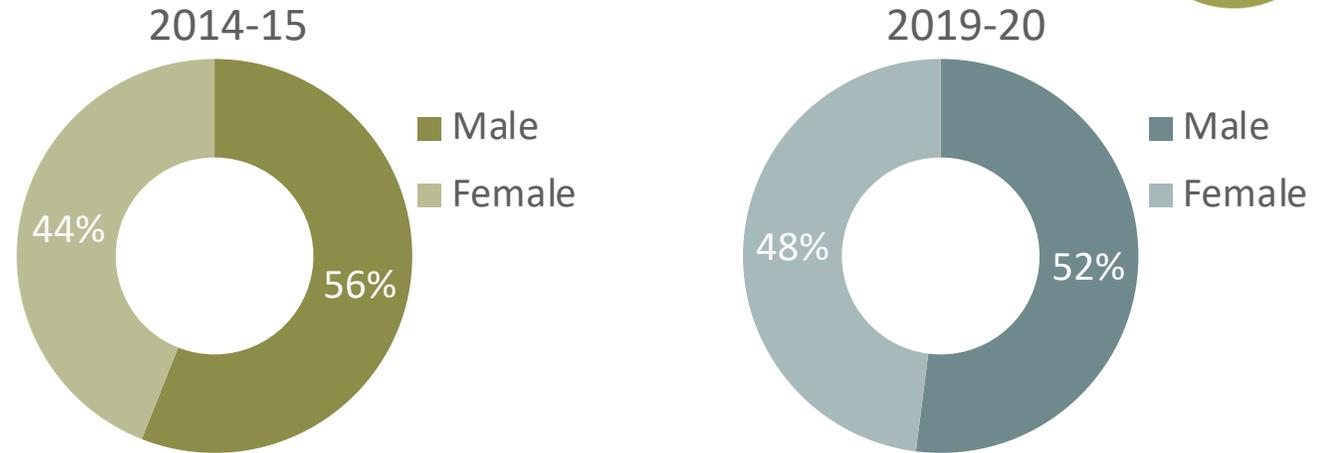
Base (All): 2014/15 2,293; 2019/20 2,262

Visitor profile

Demographics

- The total sample included slightly more males (52%) than females (48%). This represents a small increase in female respondents compared to 2014/15.
- There was an even spread across the age groups from age 35 and older with approximately one fifth of respondents falling into each band. One fifth were also in the under 35 year old age group, with 5% aged 16 to 24 and 16% aged 25 to 34.
- Younger respondents were more likely to visit the Cairngorms in the winter months than older respondents – 31% of winter visitors were aged 16 to 34 compared to 20% at other times of year. This is likely to be due to the popularity of snow sports amongst younger age groups.
- The age profile of the sample in 2019/20 matched the profile in 2014/15.

Age and gender



Q38: Gender

Q39: Which of the following age groups are you in?

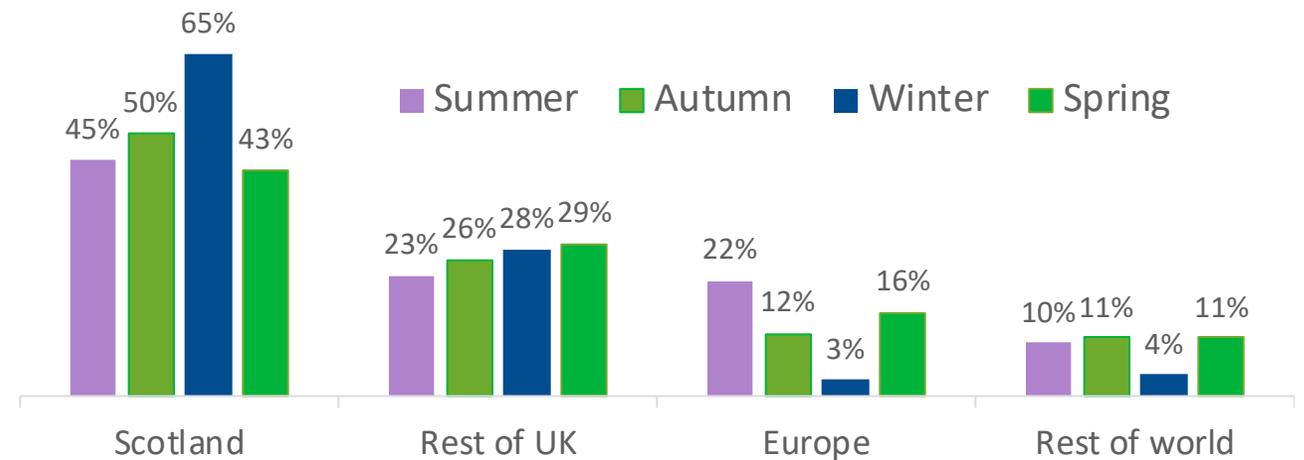
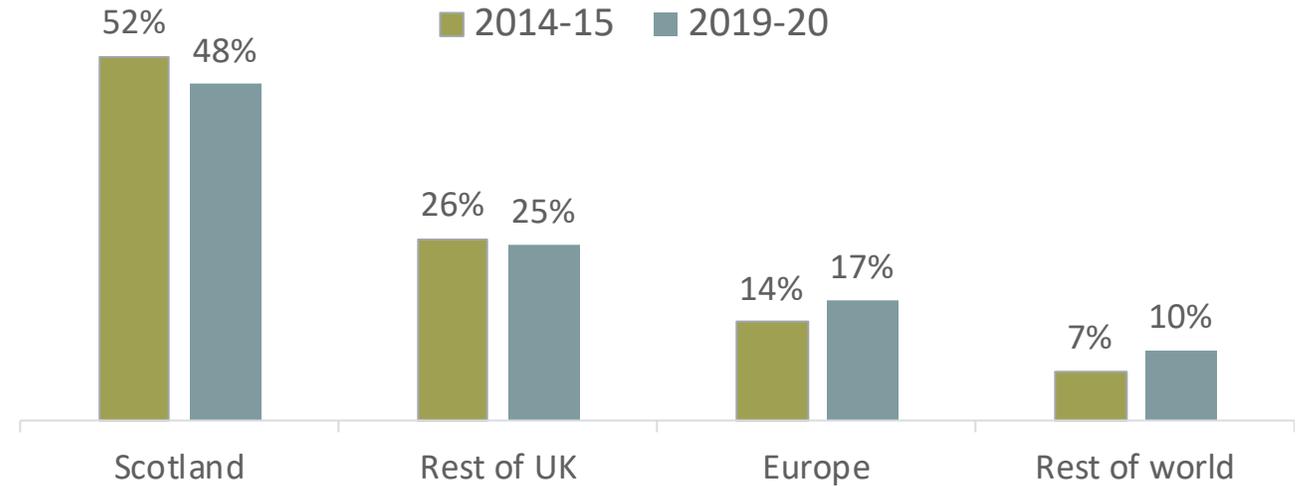
Base (All): 2014/15 2,293; 2019/20 2,262

Visitor profile

Origin

- The majority of visitors to the Cairngorms National Park in 2019/20 were from the UK (73%), with 48% from Scotland and 25% from the rest of the UK.
- Of the 27% overseas visitors, the largest proportion was from Europe (17%), with a further 5% from North America, 3% from Australia/New Zealand and 1% from other countries.
- The origin profile of visitors in 2019/20 was very similar to the profile in 2014/15. There were, however, slightly fewer visitors from Scotland and more from Europe and other parts of the world.
- The proportion of visitors from Europe peaked in spring and summer, while during the winter months almost two thirds of visitors were from Scotland, 28% were from the rest of the UK and very few visitors (only 7%) were from overseas.

Origin of visitors



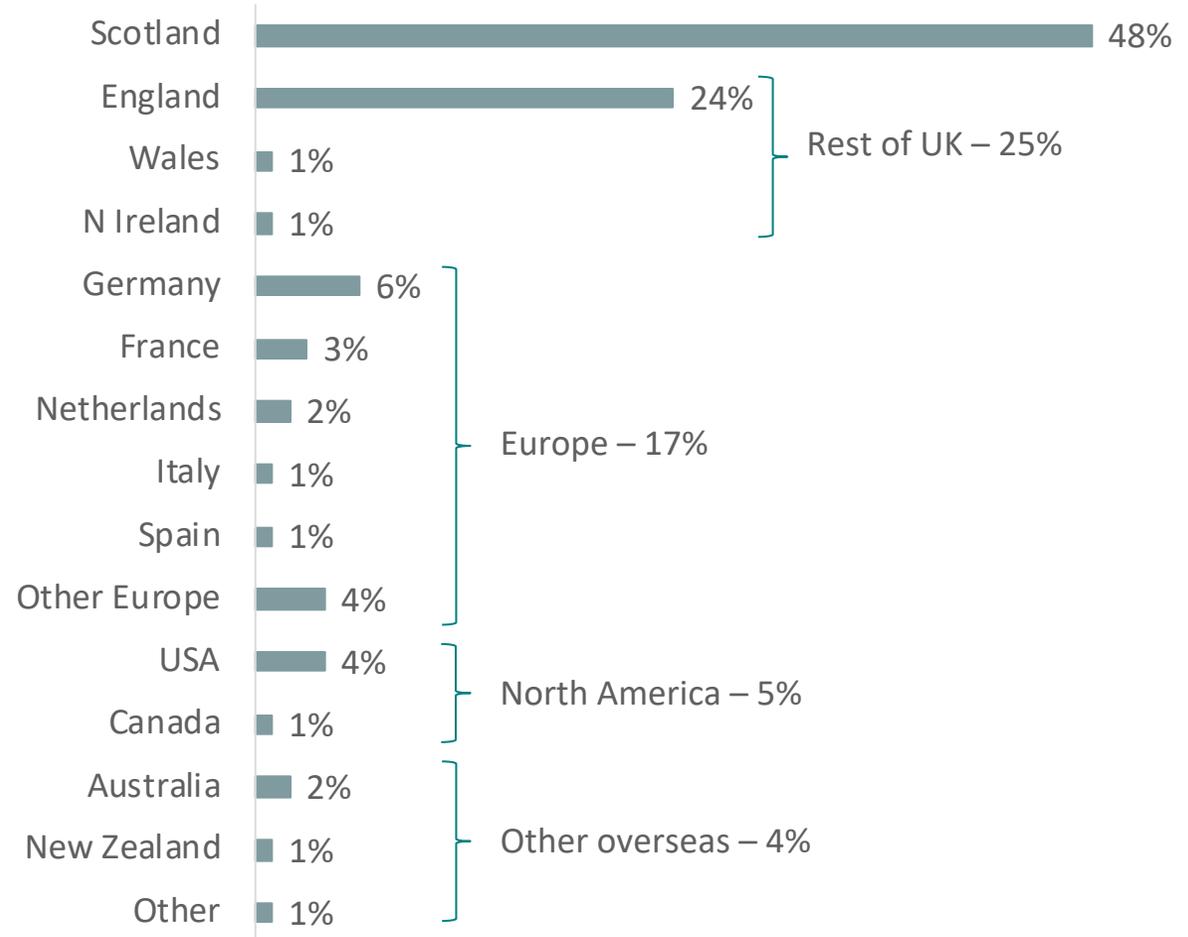
Base (All visitors, excluding residents): 2014/15 2,207; 2019/20 2,191

Visitor profile

Origin

- Outside of the UK, the largest market for visitors is Europe. In total, 17% of visitors to the Cairngorms National Park 2019/20 were from Europe.
- The most prevalent European countries were Germany (6%), France (3%) and the Netherlands (2%).
- The USA accounted for 4% of visitors, while 2% were from Australia.
- Visitors from Europe tended to be younger than those from elsewhere – 36% were aged 16 to 34 compared to 20% of visitors from Scotland, 15% of those from the rest of the UK and 20% from other parts of the world.

Origin of visitors

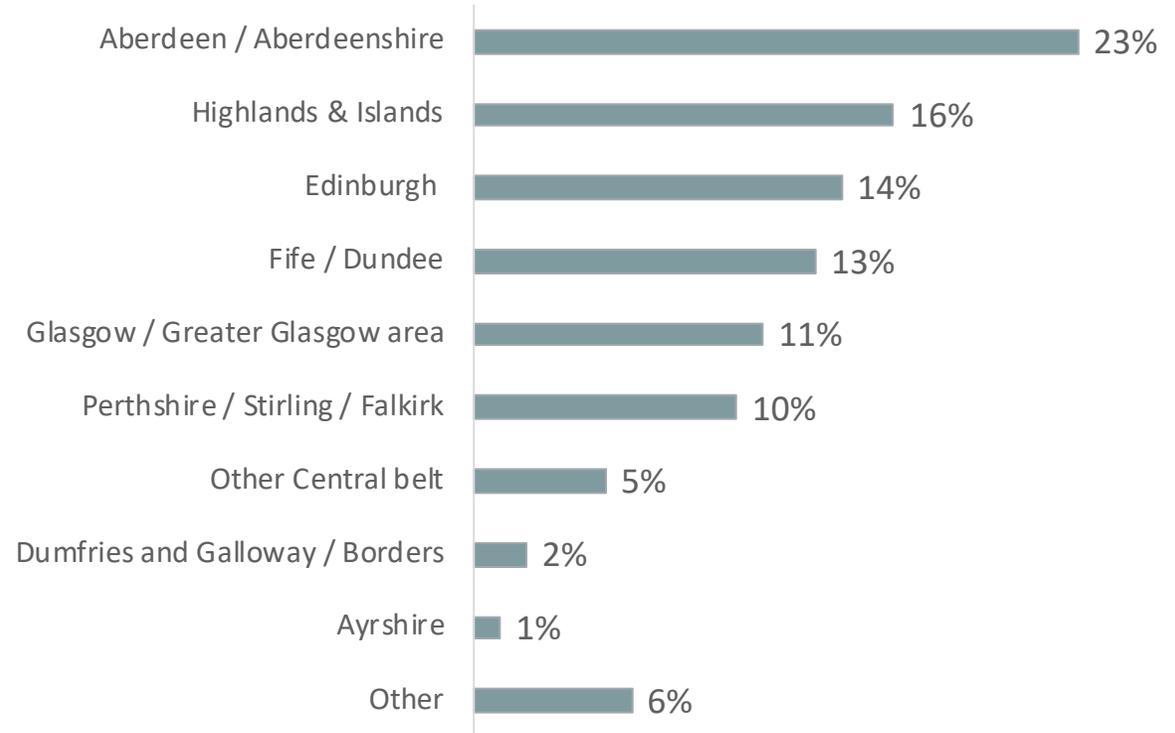


Visitor profile

Origin

- The largest proportions of visitors from Scotland came from areas within a close proximity of the Park, such as Aberdeen/shire (23%) and Highlands and Islands (16%).
- Over a quarter visited from eastern areas, including Edinburgh (14%) and Fife/Dundee (13%).
- Fewer Scotland visitors tended to come from Glasgow and Perthshire/Stirling/Falkirk – each accounting for one in ten of Scotland visitors.

Origin – Scotland visitors



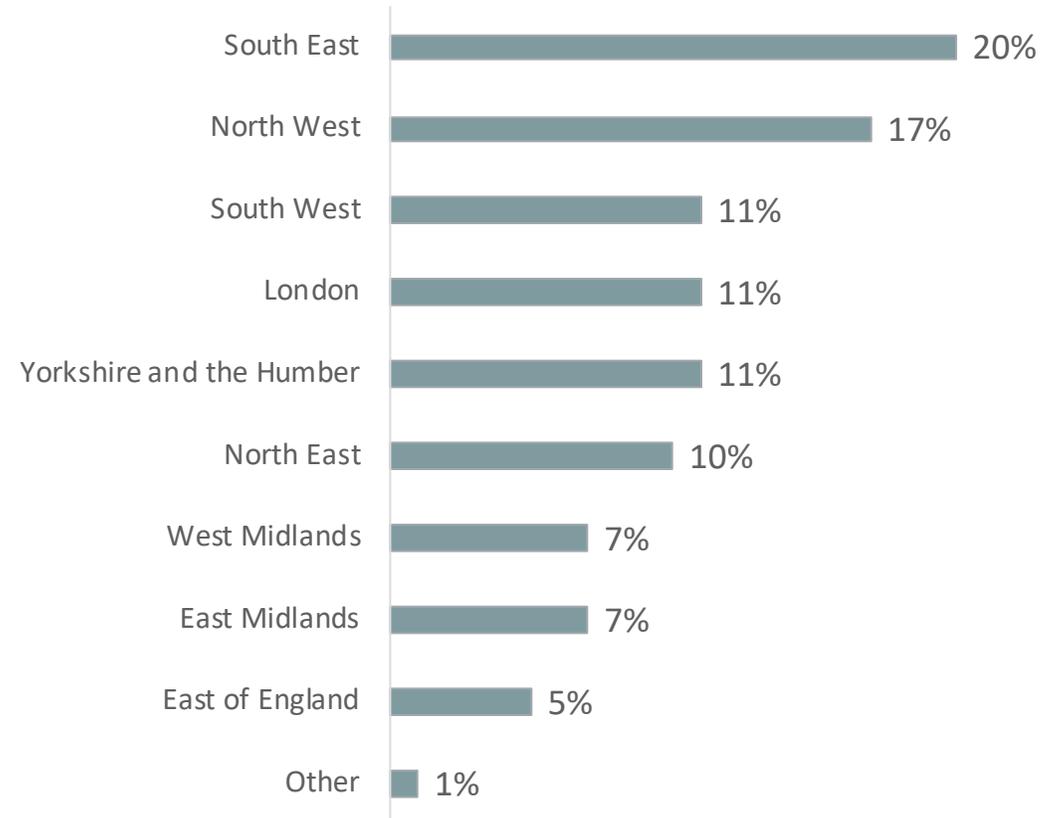
Base (All Scotland visitors, excluding residents): 1,060

Visitor profile

Origin

- Visitors from England came from a variety of regions.
- The top origin locations were the South East (20%) and the North West (17%).

Origin – England visitors



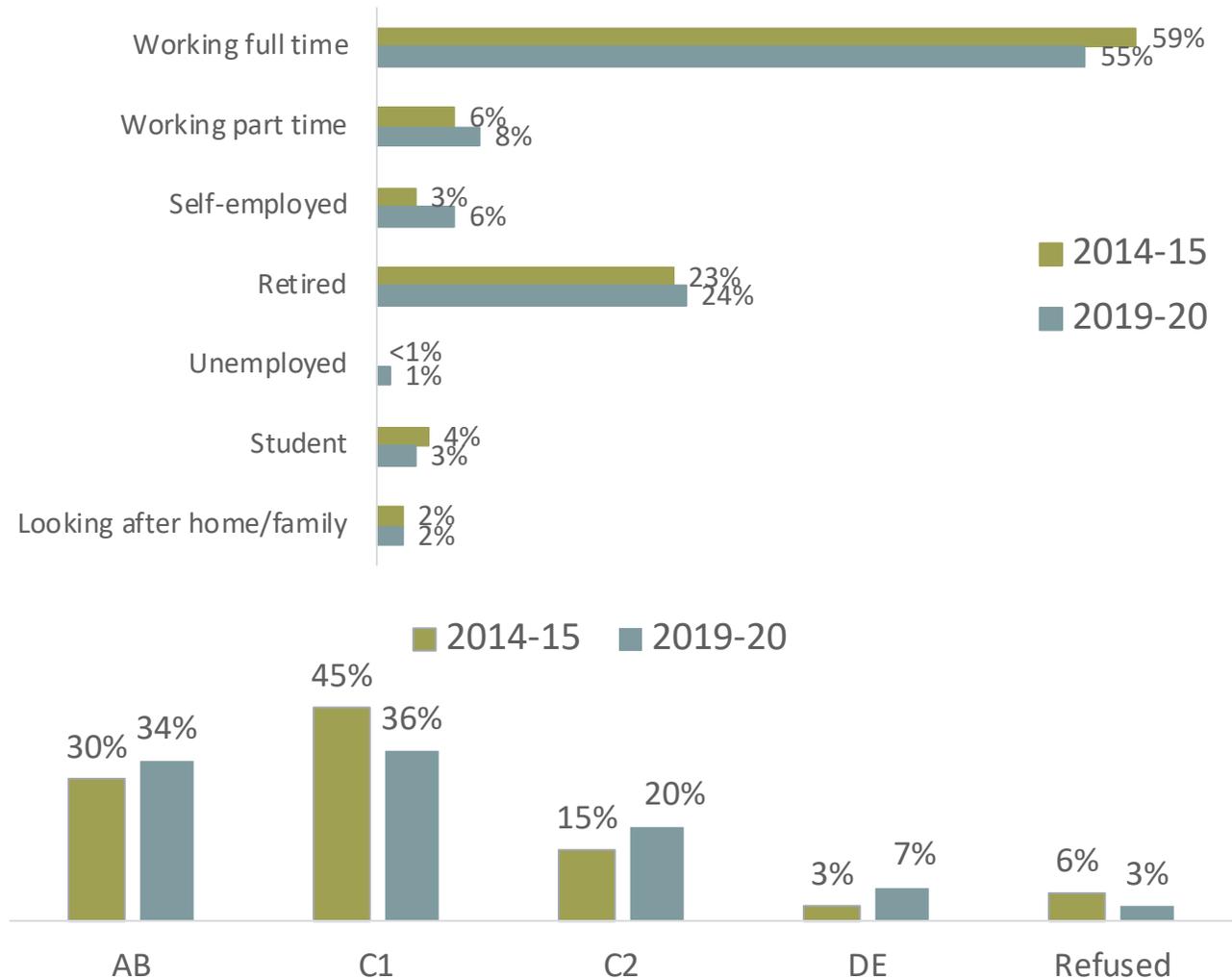
Base (All England residents): 515

Visitor profile

Economic

- The total sample of visitors and residents was skewed to more affluent socio-economic groups, with 34% within the AB group and 36% in C1.
- The summer and autumn seasons had particularly high proportions of visitors in the ABC1 socio-economic groups – 76% in summer and 71% in autumn, compared to 58% in winter and 56% in spring.
- Over two thirds (69%) were in employment while one quarter were retired. Very few were unemployed, students or looking after home/family.
- The working status findings were very similar to 2014/15 with a slight decrease in the proportion working full time and increases in those working part time or self-employed.
- The socio-economic profile of respondents showed a higher proportion in the C2DE groups and fewer in the ABC1 groups in 2019/20 compared to 2014/15.

Working status and socio-economic group

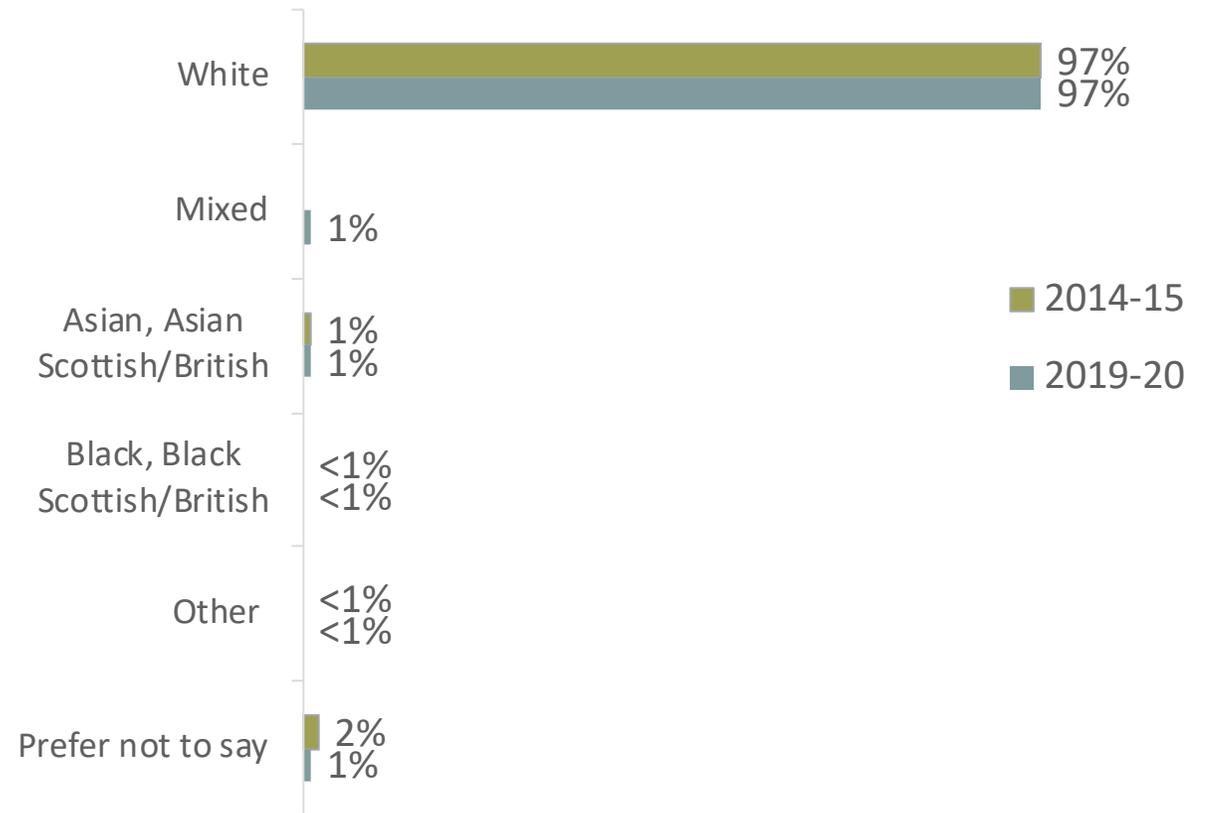


Visitor profile

Ethnicity

- In total, 2.4% of visitors to the Cairngorms National Park in 2019/20 were of Black, Asian or minority ethnic groups.
- This finding is slightly higher than in 2014/15 when 1% were from Black, Asian or minority ethnic groups.
- The largest proportions of ethnic minority visitors were from rest of UK (4%) and rest of the world, excluding Europe and North America (12%). The proportions of BAME visitors were lower for visitors from Scotland (2%), Europe (1%) and North America (2%).

Ethnic group

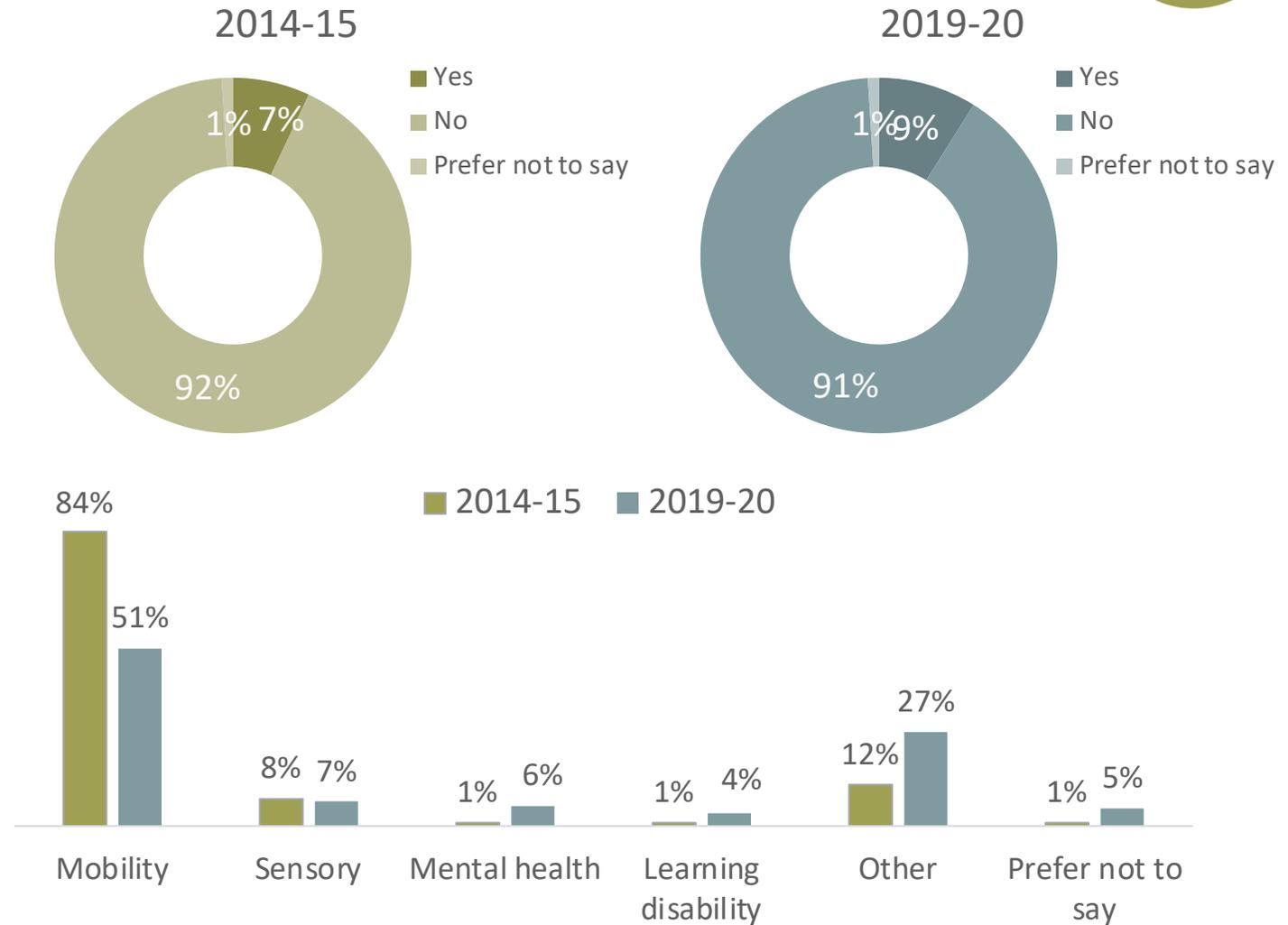


Visitor profile

Health

- Almost one in ten (9%) visitors to the Cairngorms in 2019/20 reported that they, or someone in their group, had a long term health condition or disability.
- This proportion is slightly higher than in 2014/15 when 7% reported that they or someone in their group had a health condition or disability.
- The most common health condition was mobility related (51%).
- A number of people mentioned other conditions, such as heart conditions (9 respondents; 5%), diabetes (7 respondents; 4%), and cancer (4 respondents; 2%).

Health problem or disability



Q43. Could you tell me whether you or any of the people in your group have a long term health condition or disability that affects your / their day to day activities? Q44. How would you class this disability or long term health condition?

Base (All): 2014/15 2,293; 2019/20 2,262

Base (Those who have health condition/disability): 2014/15 151; 2019/20 194

Visitor profile

First time/repeat visitors

- Over one third of all visitors in 2019/20 reported that it was their first ever visit to Cairngorms National Park.
- As we would expect, visitors from Scotland (12%) and the rest of the UK (39%) were less likely to be first time visitors than those from overseas (81%).
- When asked how often they had visited in the last five years, 44% reported that their current visit was the first in that time frame.
- More than a quarter (28%) were very regular visitors having visited 7 or more times in the last five years.

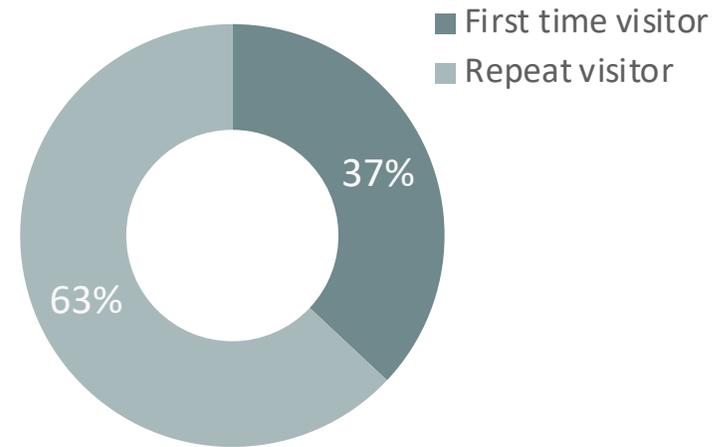
Q9. Is this your first visit to the National Park?

Q10. Including this visit, how many times have you visited the Cairngorms area in the last five years?

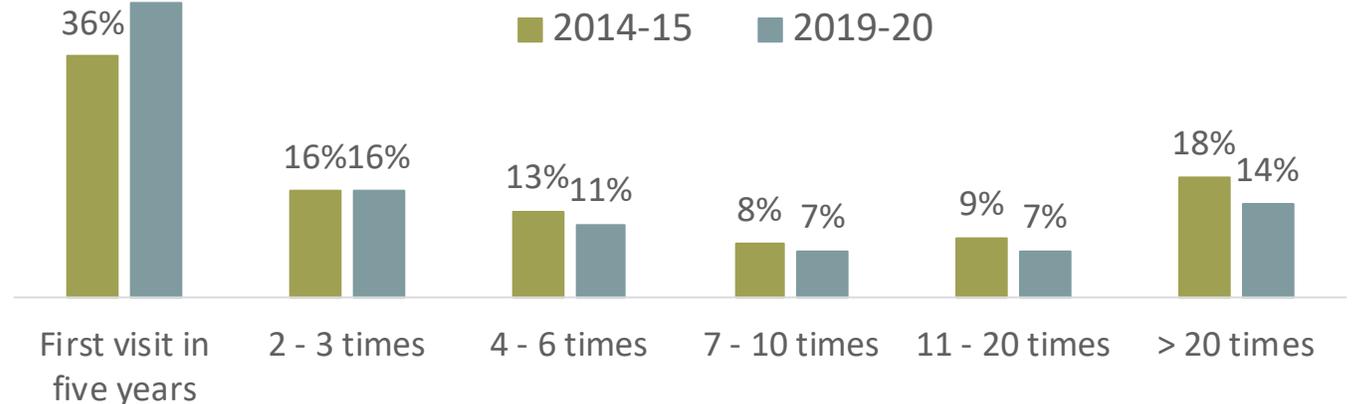
Number of times visited Cairngorms



Ever visited Cairngorms National Park - 2019-20



Number of visits in last 5 years



* 2014/15 data for first time visitors is not shown because in 2014/15 the question only asked about first visit in five years, rather than first ever visit.

Base (All visitors): 2014-15 2,207; 2019-20 2,191



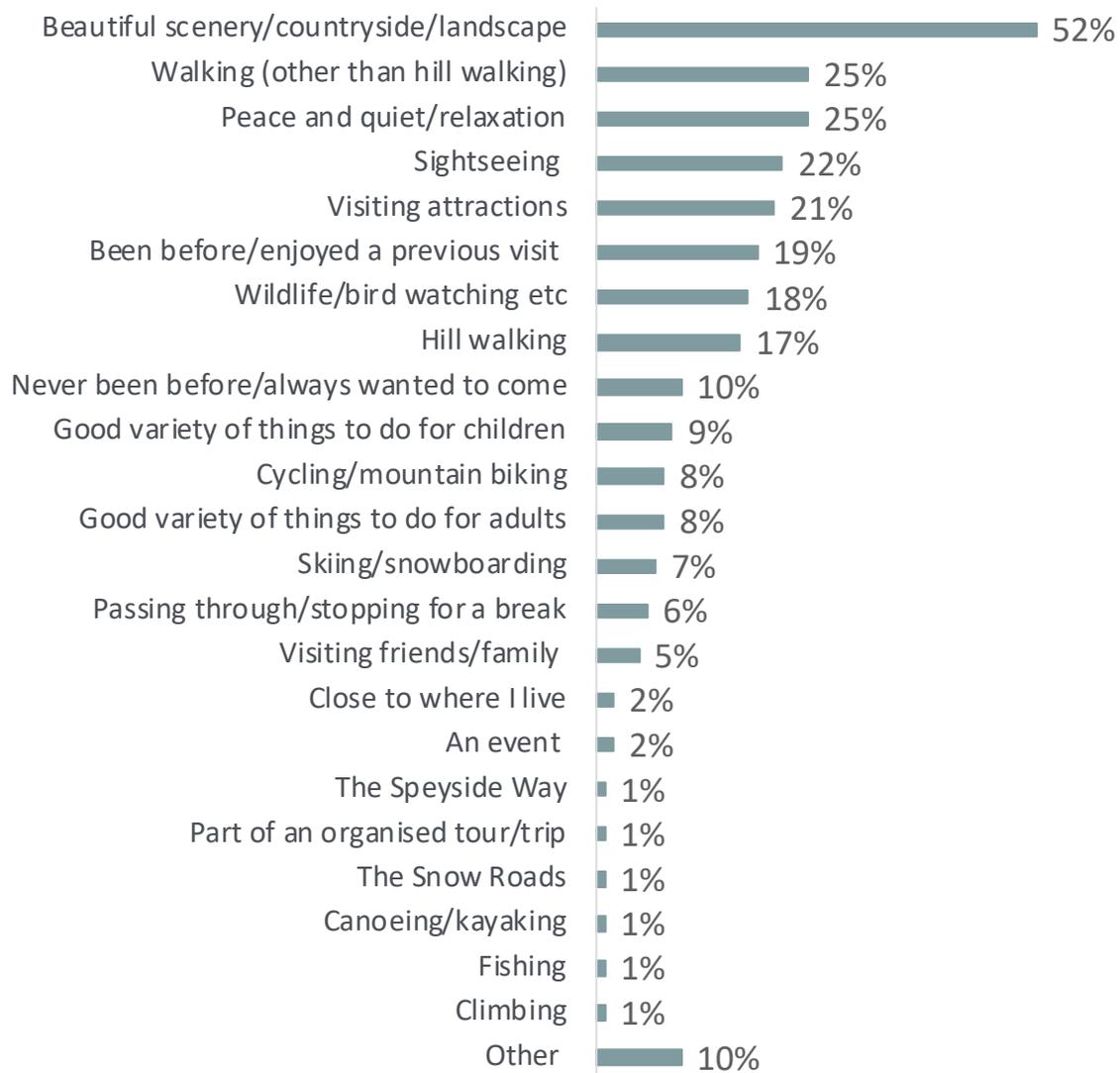
Motivations to visit Cairngorms area

Motivations to visit Why Cairngorms?

- The main motivation for people visiting Cairngorms National Park was to enjoy the beautiful scenery – mentioned by over half of respondents. Other key reasons for visiting included walking, for peace and quiet, sightseeing, visiting attractions, wildlife/bird watching and hillwalking.
- The beautiful scenery was particularly important to overseas visitors (74%) compared to those from Scotland (39%) or the rest of the UK (54%). Europeans were the most likely to be attracted by peace and quiet (35%) and a higher than average proportion mentioned hill walking (23%). A good variety of things to do for children was a key motivation for Scotland visitors (12%). Visiting attractions was more likely to be mentioned by overseas visitors (31%) than those from Scotland (18%) or the rest of the UK (17%).
- As we would expect, motivations for visiting in winter were different from other seasons. Winter visitors were more likely to be motivated by snow sports (42%) and less likely to mention factors such as scenery (27%), walking (13%), sightseeing (10%) and peace and quiet (14%) than visitors in other seasons.
- These motivations correspond with the most popular reasons for visiting the Cairngorms in 2014/15, although fewer people mentioned the beautiful scenery in the previous survey (35%).

Q13. What were your main reasons for choosing to visit the Cairngorms area on this trip?

Reasons for visiting Cairngorms area

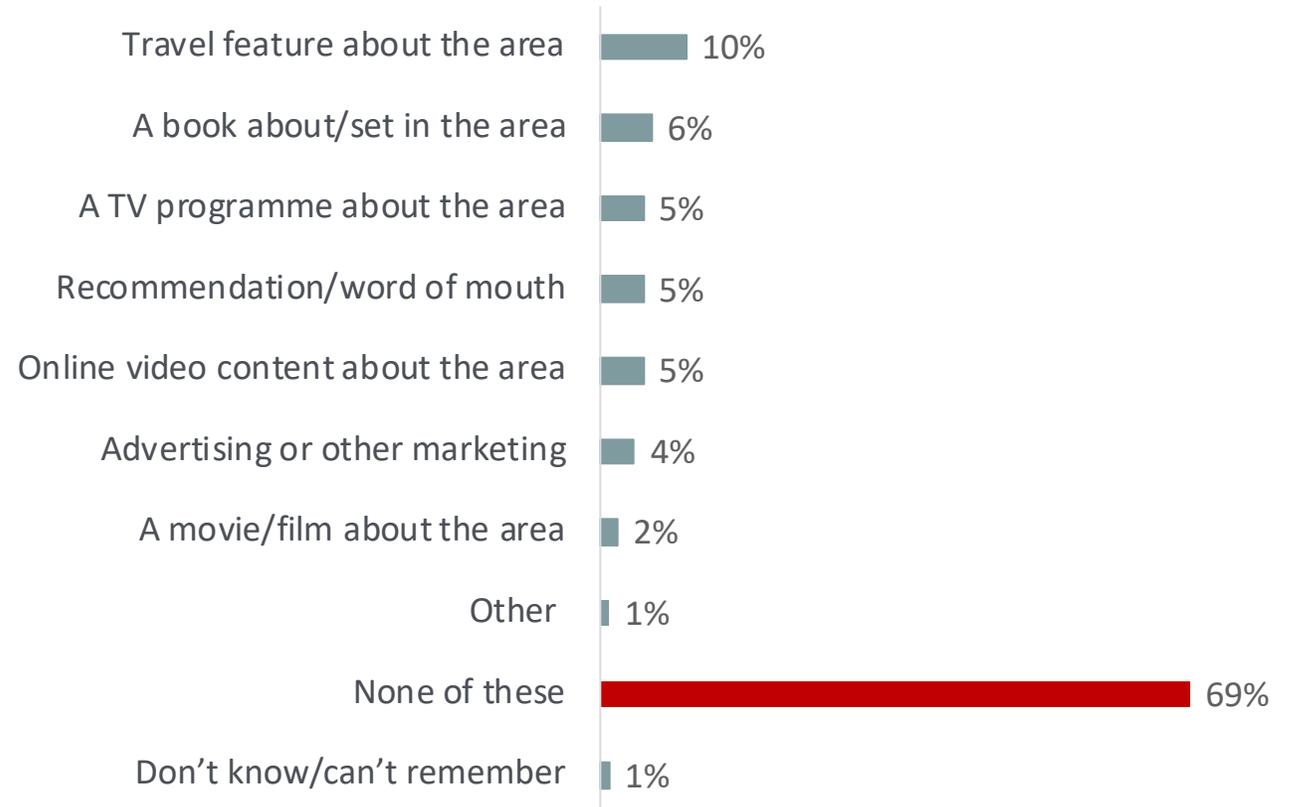


Base (All): 2,262

Motivations to visit Inspiration

- As well as determining the reasons for visiting the Cairngorms National Park, it is also important to understand sources of inspiration, such as travel features, films, books and TV.
- In total, 30% of visitors reported that they were inspired to visit the Park by something they saw, read or heard.
- The most popular source of inspiration was a travel feature about the Cairngorms (10%). Other sources that inspired visits to the Cairngorms included books about or set in the area (6%), TV programmes (5%), recommendations (5%) and online video content (5%).
- Visitors from overseas were more likely to be inspired by things they had seen or heard than those from the UK; 59% mentioned at least one source compared to 14% of Scotland visitors and 31% of visitors from the rest of the UK. In particular, 24% of overseas visitors were inspired by a travel feature (compared to 3% of those from Scotland and 9% from rest of UK), while 15% were inspired by reading a book.
- First time visitors were also more likely to be influenced by something they had seen or heard – 54%, compared to 16% of repeat visitors. In particular, first time visitors were inspired by a travel feature (21%), a book (11%), a TV programme (9%) or online video content (9%).

Inspiration for visiting Cairngorms area



Q14. Did any of the following things prompt you to consider coming to the Cairngorms?

Base (All visitors): 2,191

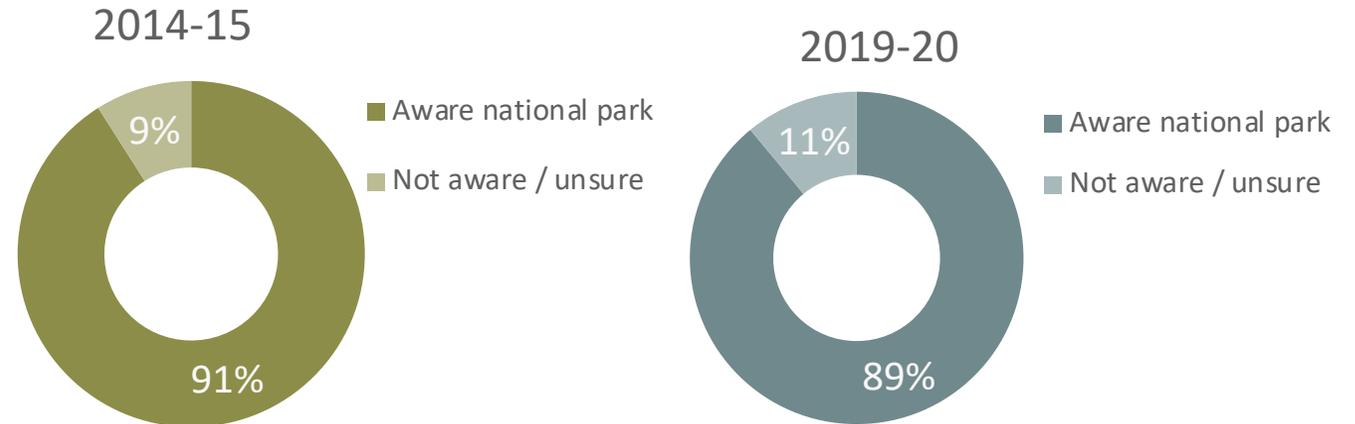
Motivations to visit National park status

- Almost nine out of ten visitors to the Cairngorms National Park reported being aware that the area is a national park. This finding is very similar to the proportion measured in 2014/15.
- Awareness of national park status was higher for Scotland (95%) and rest of UK visitors (89%) than for overseas visitors (79%).
- Over half of respondents who were aware of the national park status of the Cairngorms area stated that this was important to their decision to visit, with an even split between those describing it as 'very' and 'quite' important.
- This represents a significant increase in the importance of the national park status to visitors compared to 2014/15 when 36% of aware visitors considered it important.

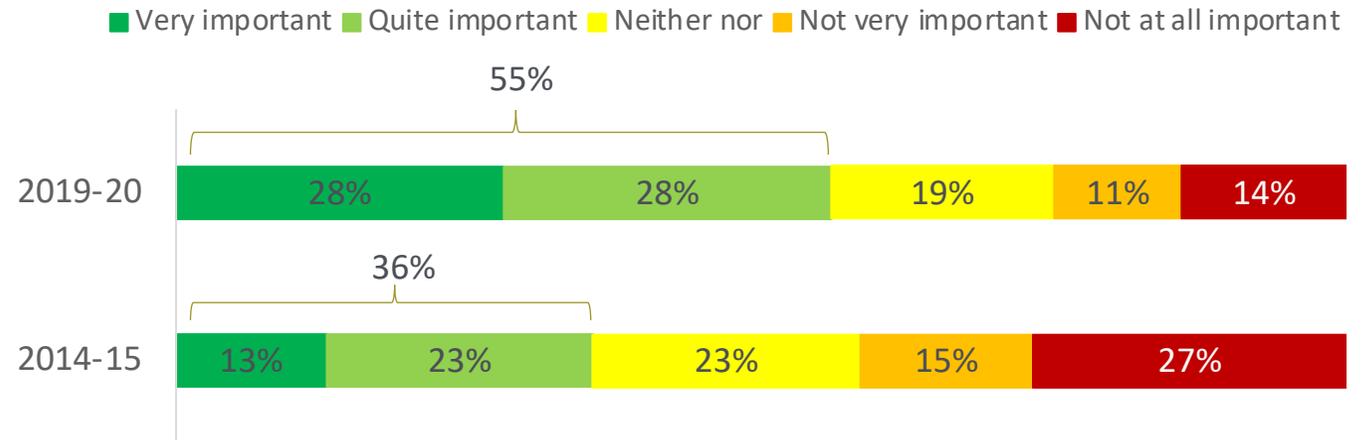
Q15. Before today, were you aware that this area is a National Park?
 Q16. In your decision to visit the Cairngorms area, how important was the fact that this area is a National Park?



Awareness of national park status



Importance of national park status



Base awareness (All visitors): 2014-15 2,207; 2019-20 2,191
 Base importance (All aware): 2014-15 2,008; 2019-20 1,954

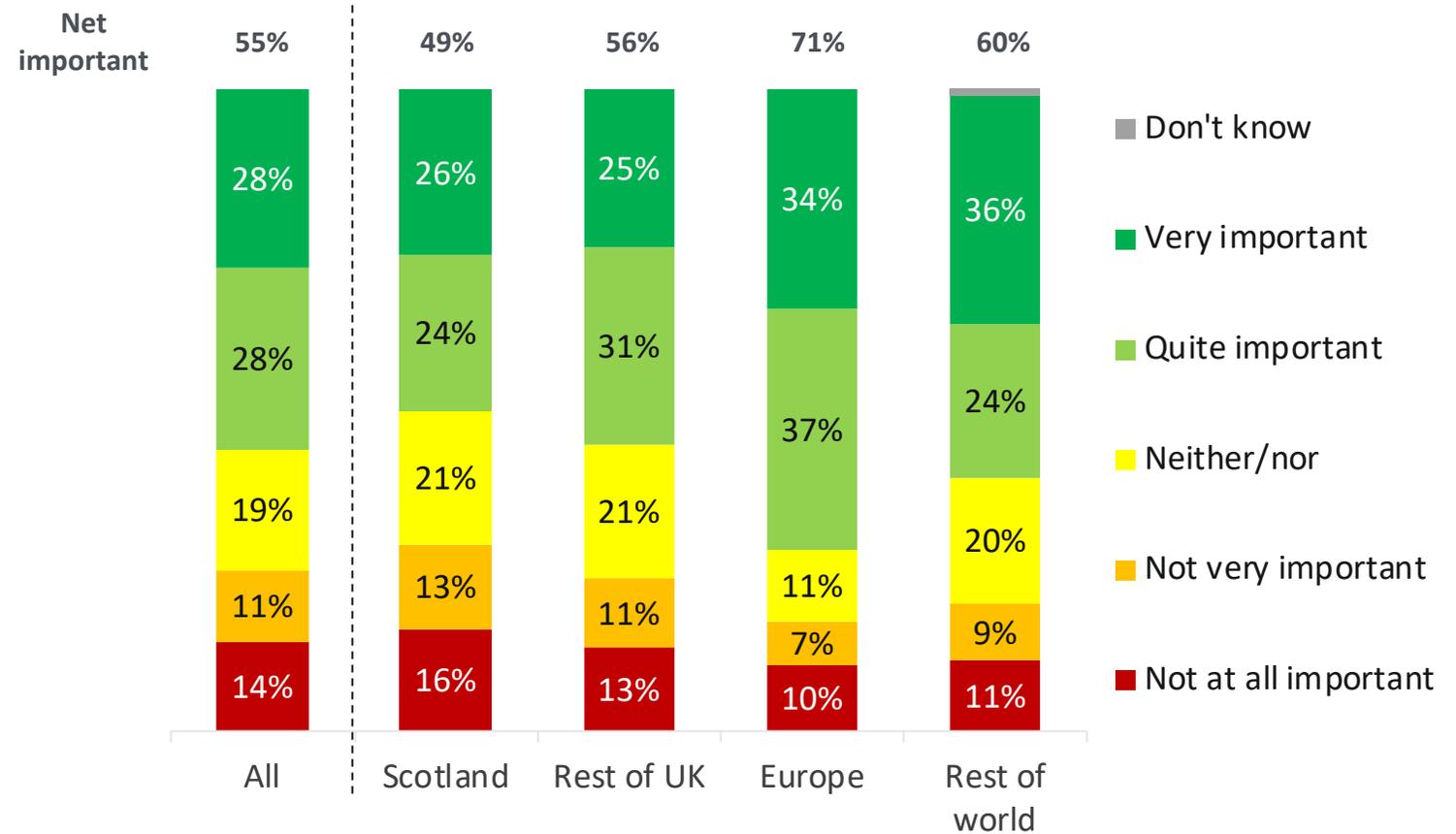
Motivations to visit

National park status

- The importance of national park status was found to vary with origin of respondent.
- Visitors from Europe were the most likely to consider it important, while those from Scotland were the least likely.



Importance of national park status



Q16. In your decision to visit the Cairngorms area, how important was the fact that this area is a National Park?

Base importance (All aware): Total 1,954; Scotland 1,004; Rest of UK 484; Europe 297; Rest of world 169



Trip profile

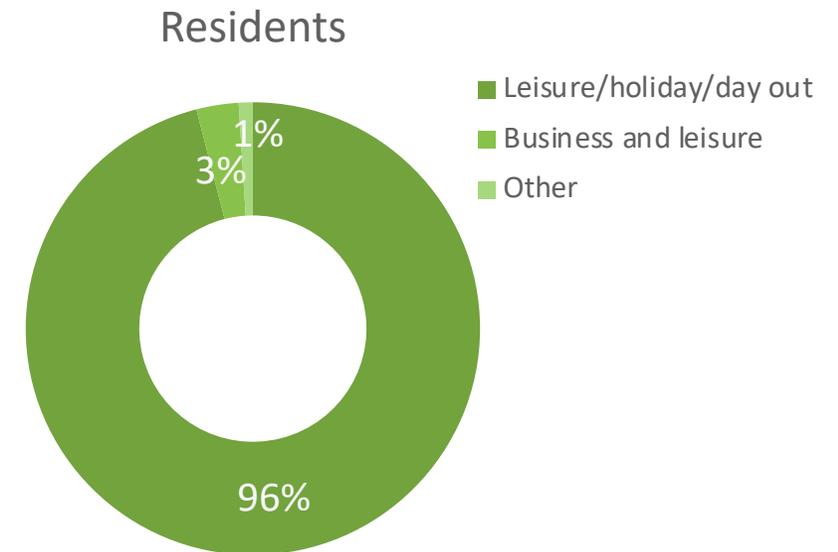
Trip profile

Type of trip

- Screener questions were used at the start of the survey to determine the reasons why people were visiting the area. Those visiting for business/work or for personal business (such as food shopping, post office, doctors) were screened out.
- As we would expect, amongst those who took part in the survey, the predominant reason for visiting for both visitors to the Cairngorms and residents was a leisure trip, such as a day trip, short break or holiday.
- A small minority of 2% of visitors were visiting friends or relatives as part of their trip, while 1% were combining business and leisure in one trip.

Q1 (visitors). Which of these reasons best describes your reason for visiting the National Park today? Q2 (residents). Which of these reasons best describes your reason for visiting *[sample location]* today?

Reason for visiting



Base (visitors): 2,191

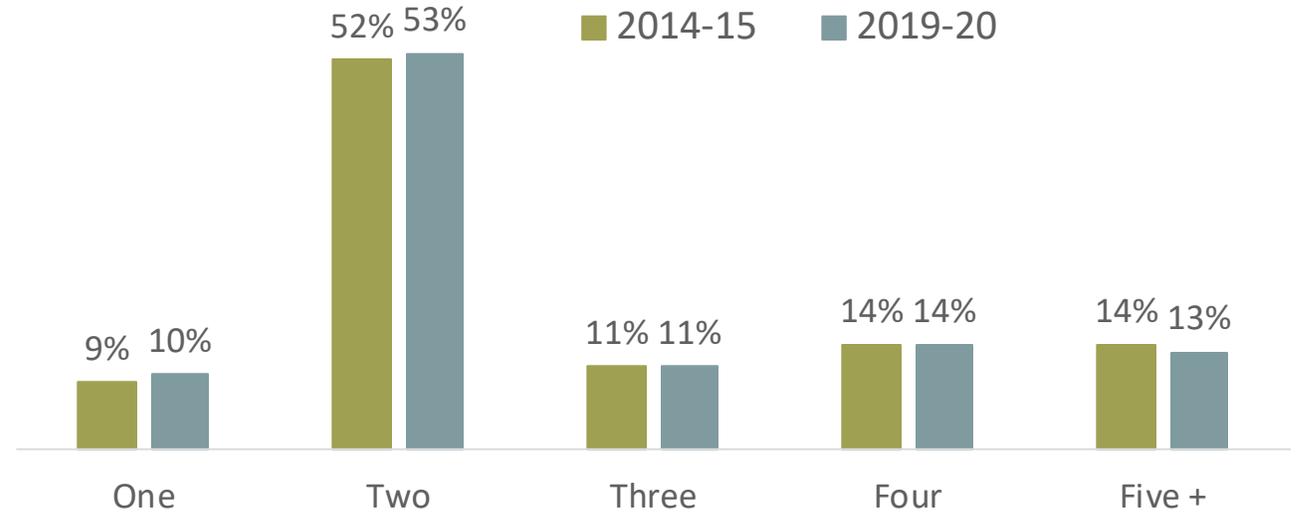
Base (residents): 71

Trip profile

Party composition

- Just over half of respondents were visiting Cairngorms National Park in a group of two people, while one in ten were visiting alone, one quarter had three or four people in their group and 13% had five or more. The average total group size was 3.1 people.
- Just over a quarter of respondents reported having children aged under 18 in their party. The average number of children in the group amongst these respondents was 2.1. There were higher proportions of visitors with children in summer (30%) and winter (27%) than in autumn (20%) or spring (15%).
- Visitors from Scotland were the most likely to have children in their party (33%), followed by those from the rest of the UK (21%). Only 14% of overseas visitors had children with them. As we would expect, visitors in the 35 to 44 (48%) and 45 to 54 (36%) age groups were also more likely to be visiting with children.
- All of these figures very closely correspond to the data gathered in 2014/15.
- A slightly higher proportion were visiting with dogs in 2019/20 (15%) than in 2014/15 (12%). Amongst visitors from the UK, 20% were visiting with a dog.

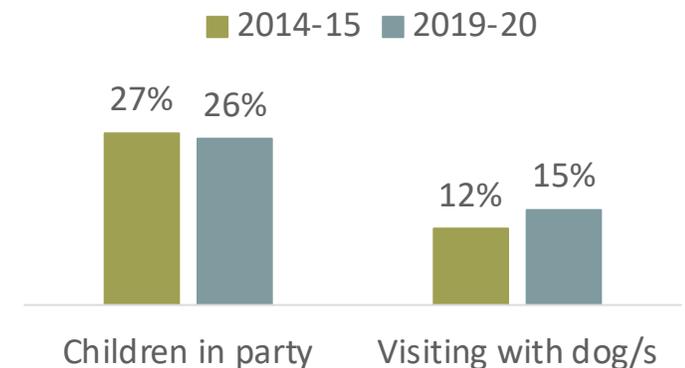
Number of people in party



Average number in party	2014-15	2019-20
Average number of adults	2.7	2.5
Average no. of children*	2.1	2.1
Average group size	3.2	3.1

* Average number of children among parties that included at least one under 18 year old

Children in party / visiting with dog/s

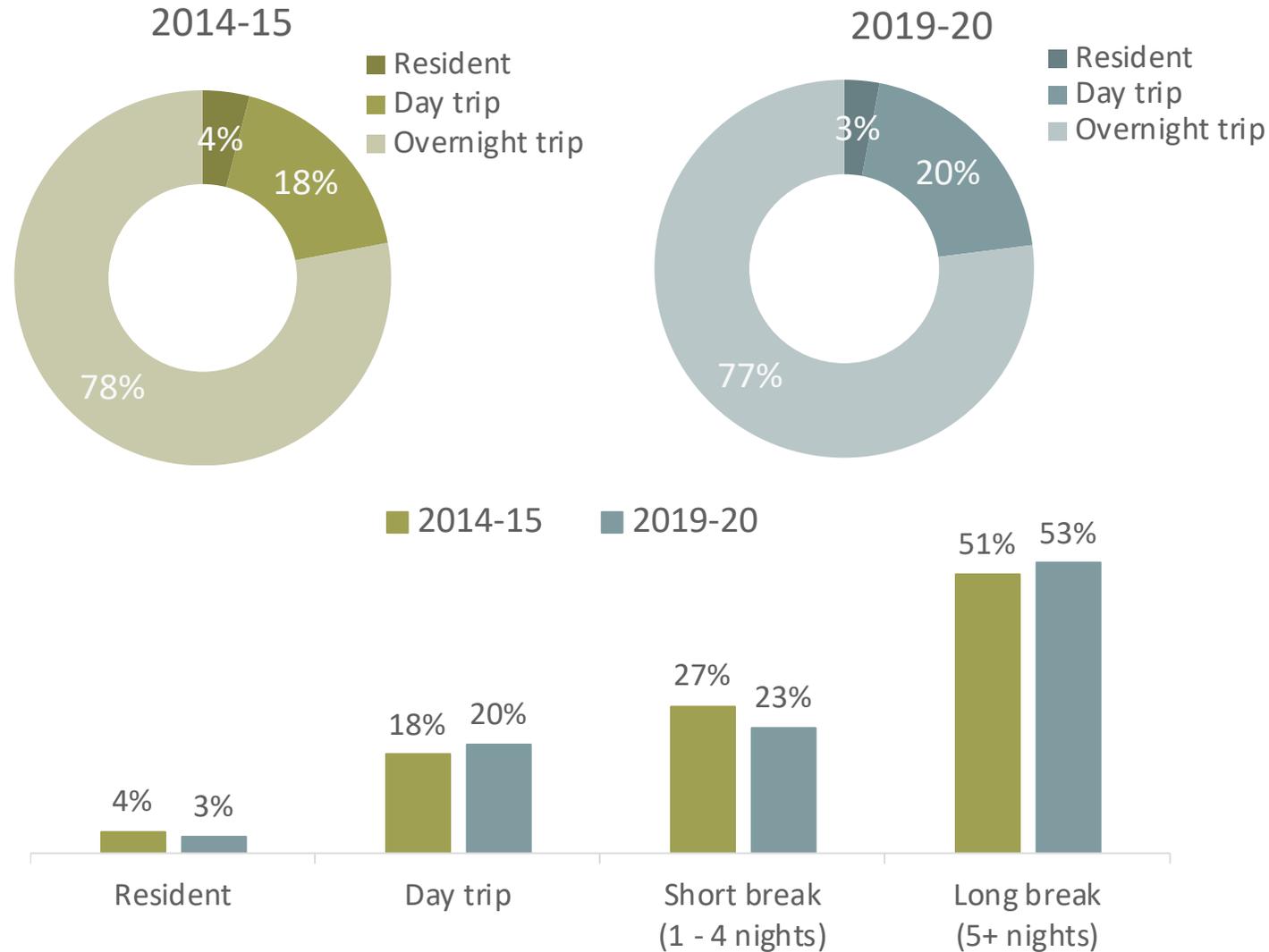


Trip Profile

Type of visitor

- The majority of respondents were overnight visitors (77%) with one fifth on a day trip from home and only 3% residents.
- Respondents were more likely to be on a longer break of 5 or more nights (53%) than a short break of 1 to 4 nights (23%).
- These findings correspond closely to 2014/15, although there has been a small decrease in the proportion of visitors on a short break.

Type of visitor



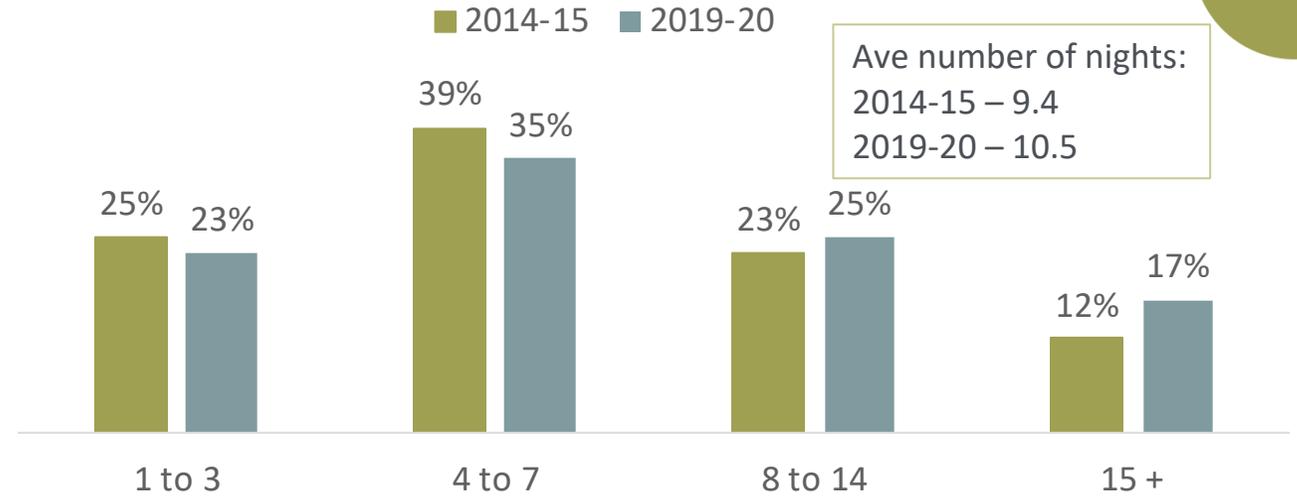
SQ2. Postcode; Q3. Are you on a day trip from home, or are you staying overnight or on holiday away from home? Q4. How many nights IN TOTAL will you be spending away from home on this trip?

Trip profile

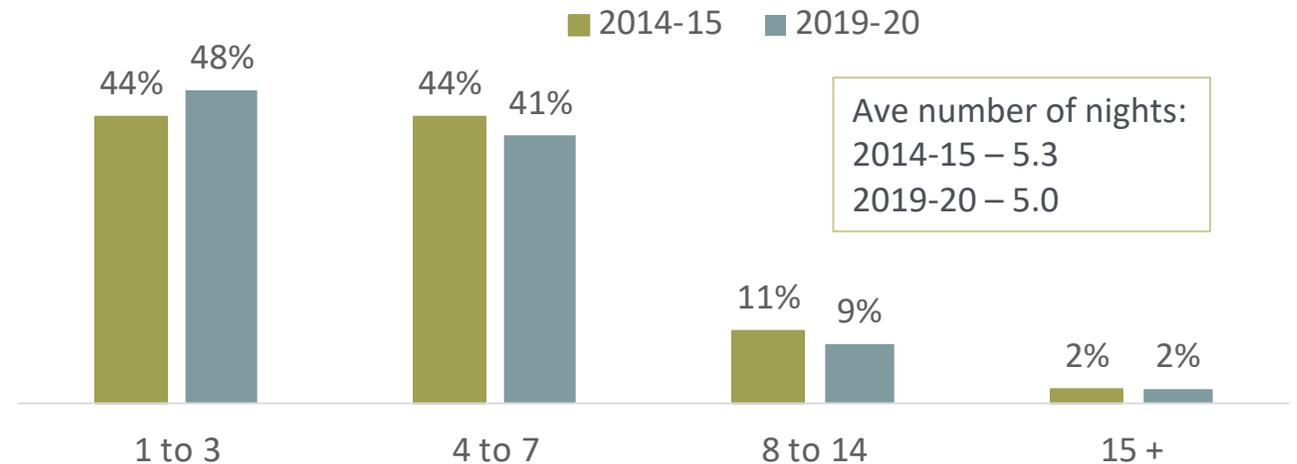
Number of nights

- Overnight visitors were asked how many nights they spent away from home in total for their trip, and in the Cairngorms area.
- Just less than one quarter were on a short break of 1 to 3 nights, while a further 35% were on holiday for up to one week and 25% were staying for up to two weeks.
- There were more people on longer holidays in 2019/20 (42% were staying more than a week) compared to 2014/15 (35%). This means the average number of nights is higher at 10.5 compared to 9.4 in 2014/15.
- More than four fifths (83%) of those who were on a holiday or short break reported that they stayed overnight in the Cairngorms area during their trip – this is equal to 66% of all visitors. These proportions are very similar to 2014/15 when 81% of overnight visitors and 65% of all visitors stayed in the Cairngorms area.
- The number of nights spent in the Cairngorms area has also remained broadly consistent with 2014/15 – most stayed for 1 to 3 nights (48%) or 4 to 7 nights (41%), with an average 5 nights.
- Visits in the summer and spring months tended to be longer than in autumn and winter – 14% were staying more than 7 nights in summer and 12% in spring, compared to 8% in autumn and 4% in winter.

Number of nights – total trip



Number of nights – in Cairngorms



Q4. How many nights in total will you be spending away from home on this trip?
Q5. How many of these nights will you be spending in the Cairngorms area?

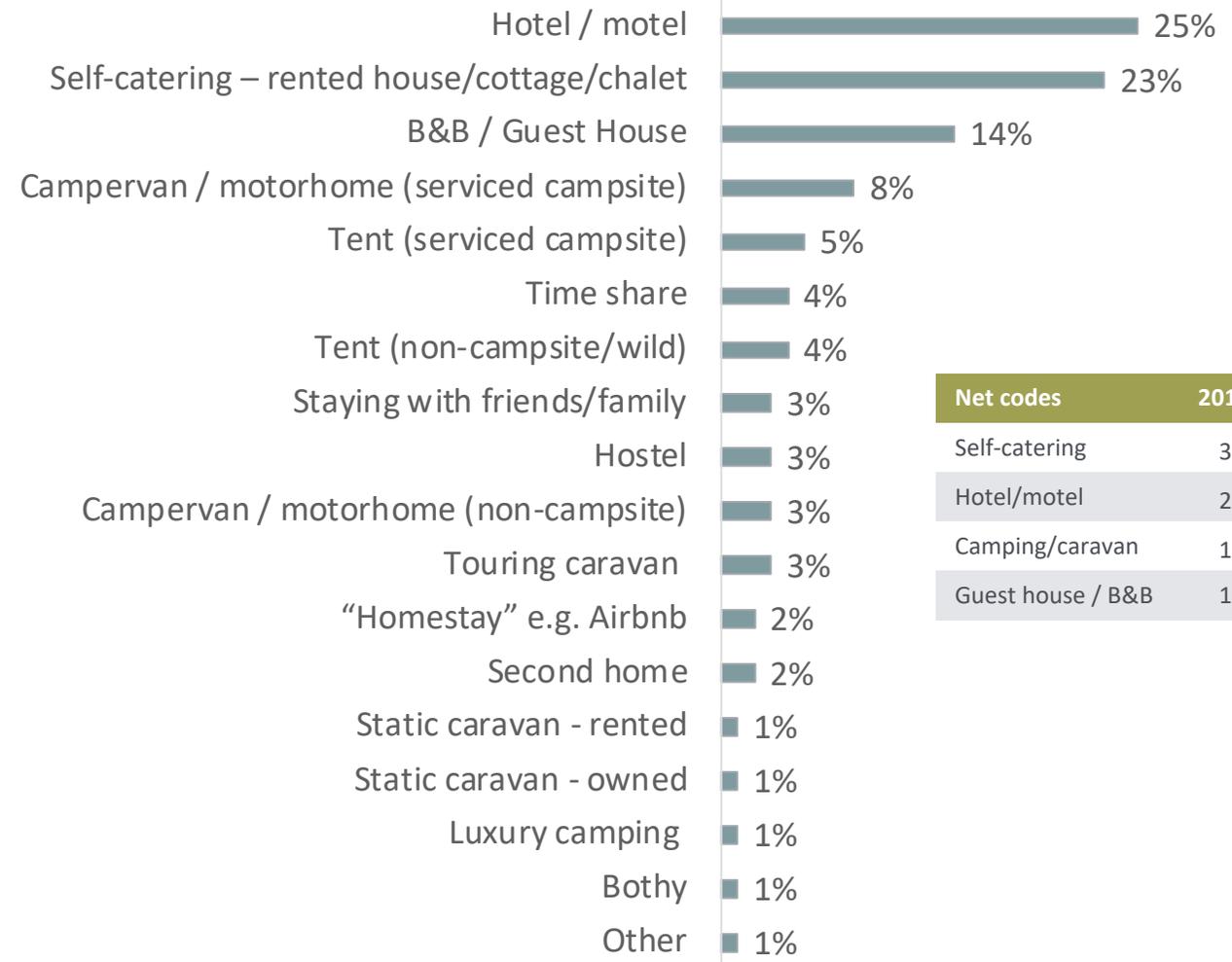
Base total trip (all overnight visitors): 2014/15 1,783; 2019/20 1,738
Base Cairngorms (all overnight in Cairngorms): 2014/15 1,442; 2019/20 1,444 31

Trip profile

Accommodation

- For those visitors who were staying in the Cairngorms area hotels (25%) and rented self-catering houses/cottages/chalets (23%) were the most popular types of accommodation. However, when combining all self-catering options, including time shares, 'homestay' accommodation and second homes, the total proportion is 32%, making it the top accommodation type.
- Self-catering options tended to be favoured by those from Scotland (34%) and the rest of the UK (43%), while overseas visitors tend to prefer hotels (34%) and B&Bs (28%). Camping/caravanning was mentioned by around a quarter of visitors from Scotland (28%), the rest of the UK (23%) and Europe (25%), but less often by those from North America (11%) or other overseas (4%).
- The proportions of visitors staying in self-catering accommodation and hotels were consistent with 2014/15, but there has been an increase in those choosing camping and caravanning options, such as tents, caravans and campervans.

Accommodation in Cairngorms area – Overnight visitors



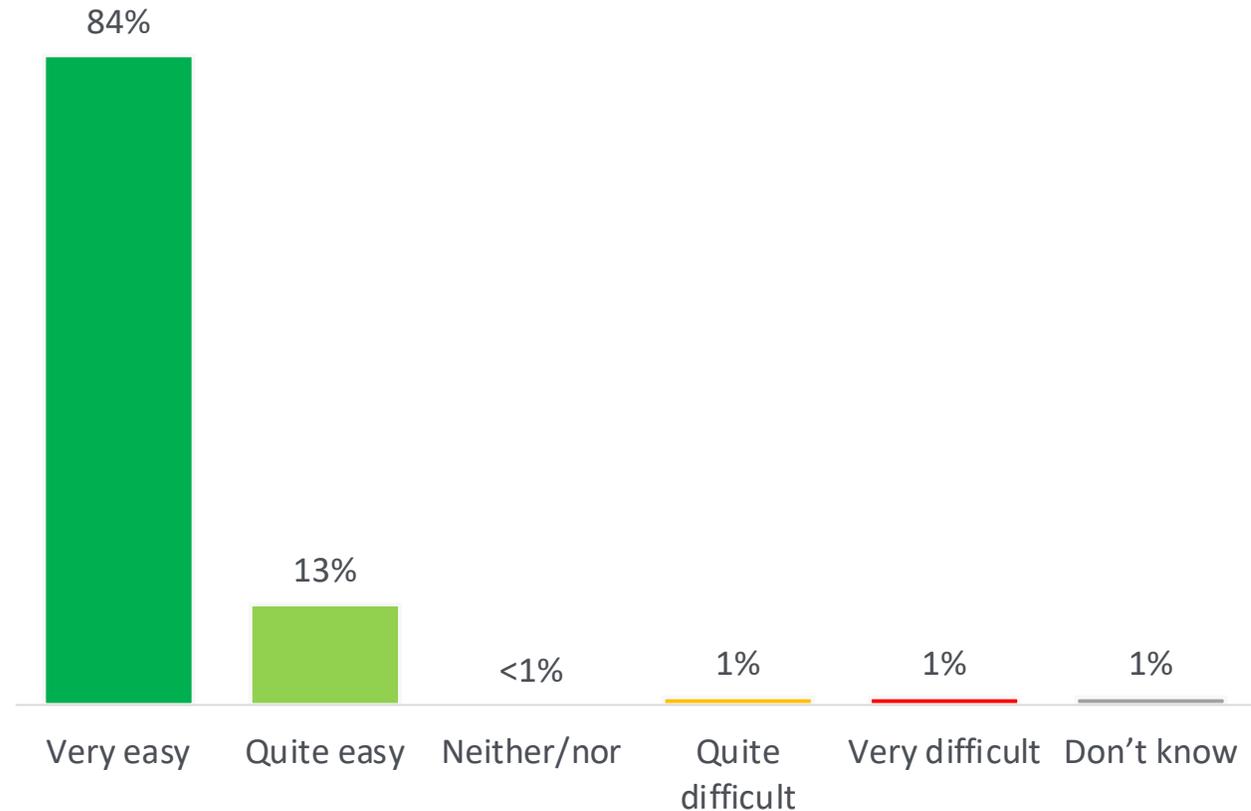
Net codes	2014-15	2019-20
Self-catering	32%	32%
Hotel/motel	26%	25%
Camping/caravan	18%	24%
Guest house / B&B	16%	14%

Trip profile

Accommodation

- Visitors who were staying overnight in paid for accommodation were asked how easy or difficult they found the booking process.
- There appears to be no serious issues in terms of booking – almost all described the process as easy, with the vast majority (84%) describing it as very easy.
- The majority of visitors described the booking process as easy regardless of where they came from. However, visitors from Scotland were more likely to describe it as 'very easy' (89%) than those from the rest of the UK (80%) or overseas (81%).

Ease of booking accommodation – Overnight visitors

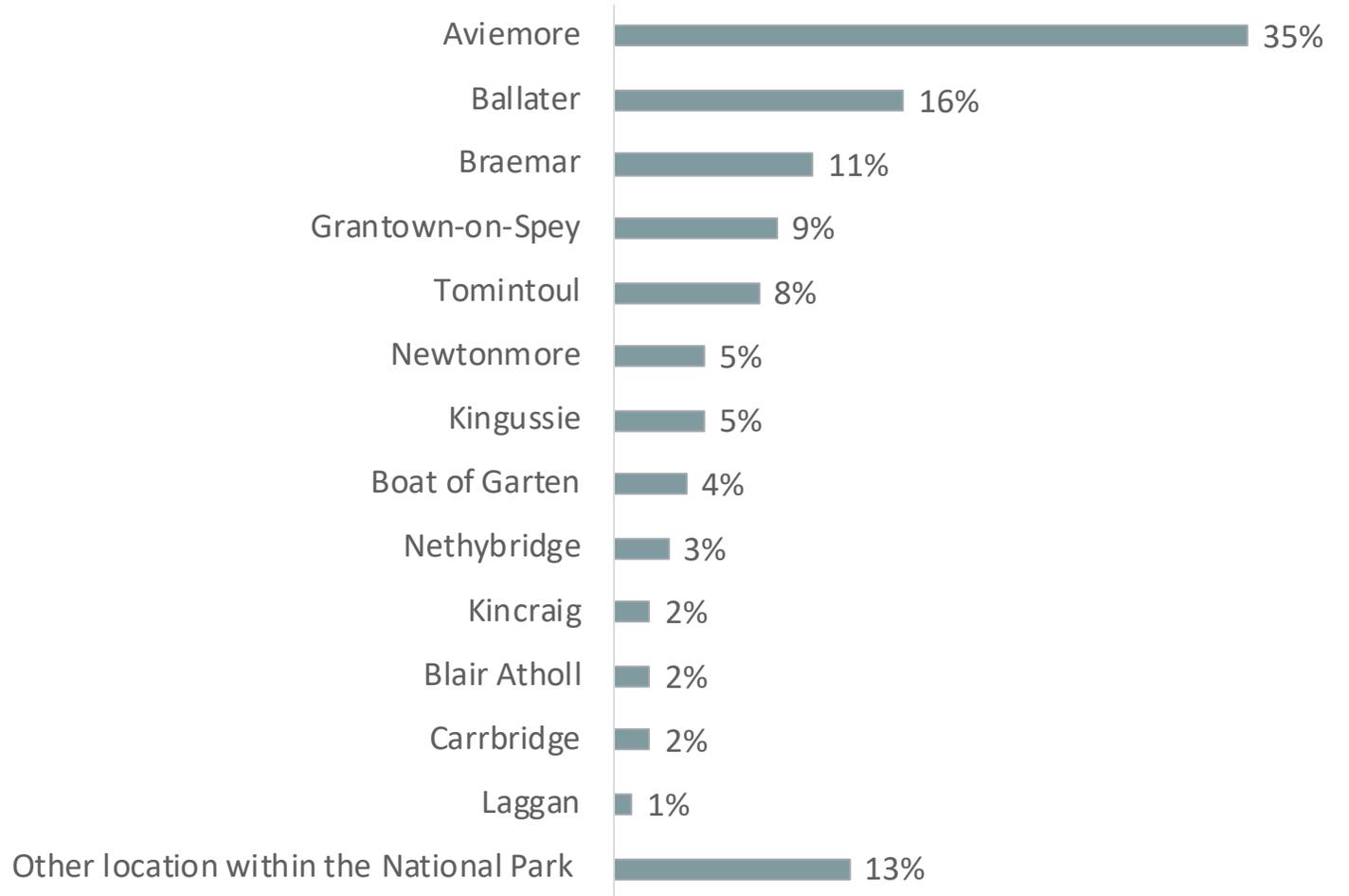


Trip profile

Areas visited

- The most popular location for staying in the Park was Aviemore – over one third of all overnight visitors stayed there. Aviemore was a particularly popular place to stay for winter visitors, with 54% of respondents staying overnight in the winter months reporting that they were staying there.
- Many of the places mentioned by visitors correspond to the main A9 route along the western edge of the Park; however, locations on the central and eastern side of the Park were also popular, with 16% staying in Ballater and 11% in Braemar.
- Overseas visitors were particularly likely to mention staying in Ballater (30%) and Braemar (19%).
- Other location mentioned included Glenmore (36 respondents) and Coylumbridge (26 respondents).

Areas of Cairngorms stayed in – Overnight visitors

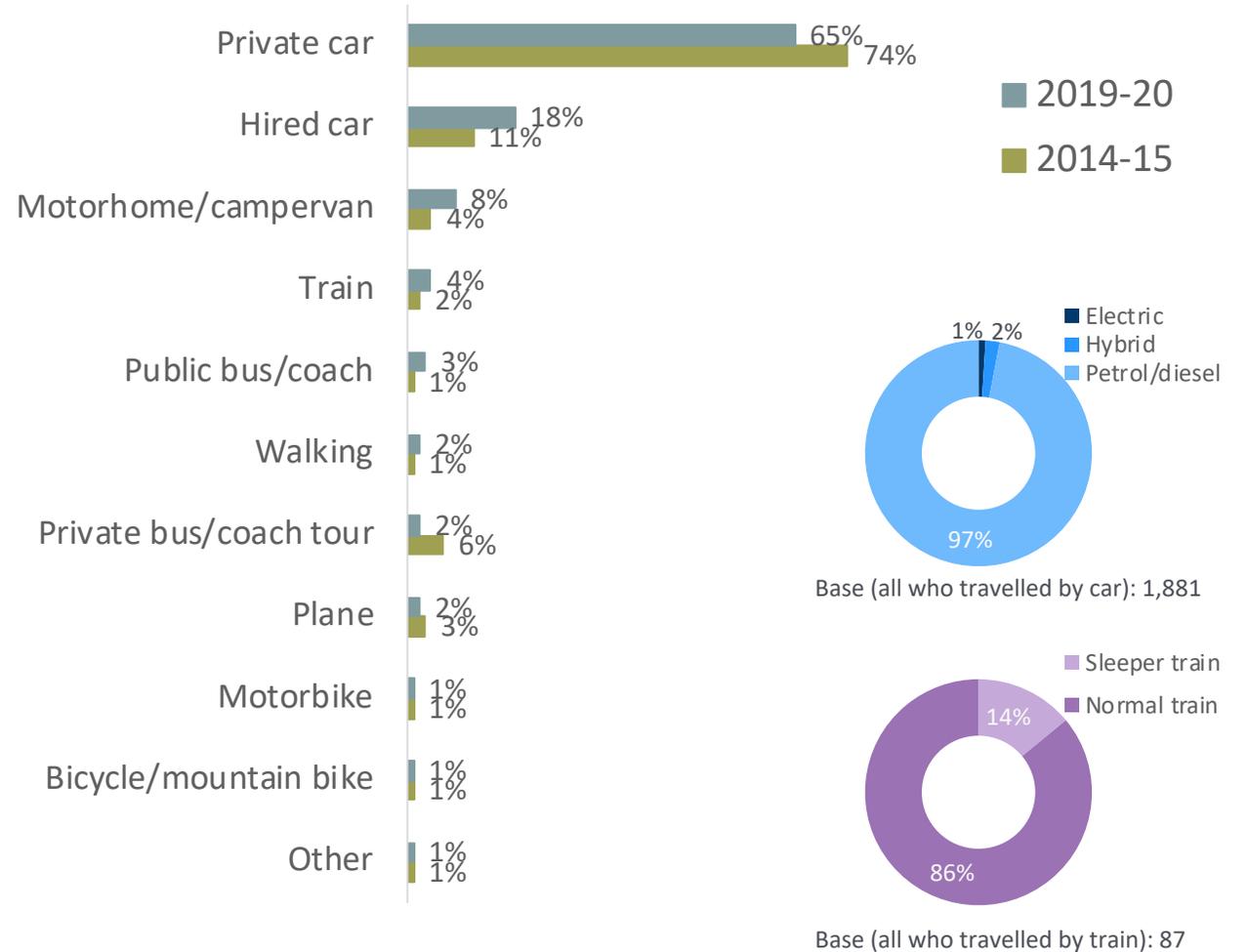


Trip profile

Transport

- The most prevalent method of transport to travel to the Cairngorms National Park was by car – mentioned by 83%, with 65% travelling in a private car and 18% using a hired car.
- Only 3% of those travelling by car reported that it was an electric or hybrid vehicle.
- Motorhomes and campervans were used by 8% of visitors and 4% travelled by train. A small but significant proportion of people travelling by train (14%) reported that they used the sleeper service.
- Mentions of hire cars were highest amongst visitors from Europe (52%), North America (73%) and the rest of the world (70%).
- Younger respondents were more likely to travel by public transport than those in the older age groups, for example, by train (mentioned by 8% of 16 to 34 year olds) or by bus (7%).
- Since 2014/15 there has been a decrease in use of private cars and an increase in hired cars. Both campervan and train usage have also increased, while fewer visitors travelled by private bus/coach tour.

Transport to the Cairngorms area



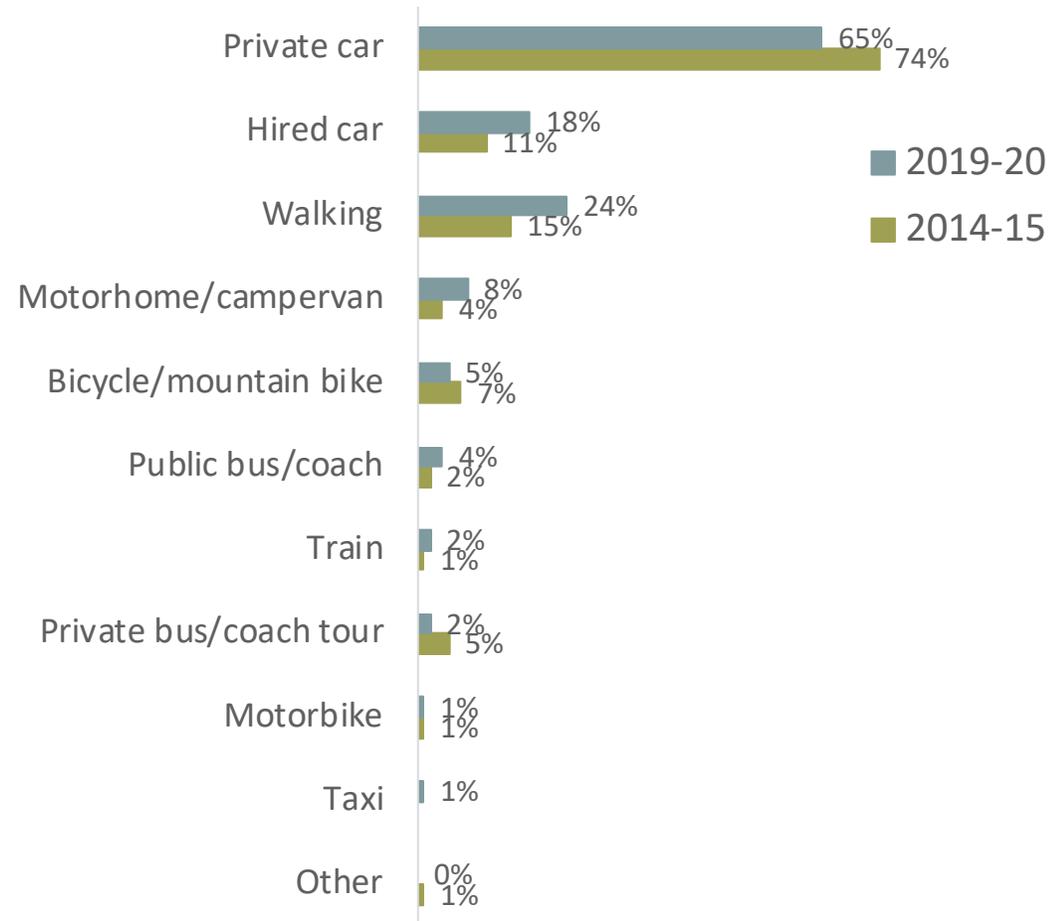
Q21. Which form(s) of transport did you use to get to the Cairngorms area?
 Q23. Was/is the car you travelled in an electric car? Q24. Did you use a rail sleeper service for any part of your journey to Cairngorms National Park?

Trip profile

Transport

- Travel by car was also the predominant mode of transport for travel within the Cairngorms National Park, mentioned by 82% of all respondents.
- Active travel was much more common within the Park; almost one quarter mentioned they travelled by walking and 5% cycled.
- Compared to 2014/15 similar differences in modes of transport within the Park were noted to those previously mentioned for visitors getting to the Park – fewer private cars, more hired cars and campervans. More people also mentioned walking within the Park in 2019/20 (24%) than in 2014/15 (15%).

Transport within the Cairngorms area



Q22. Which form(s) of transport, if any, have you / will you use within the National Park area?

Trip profile

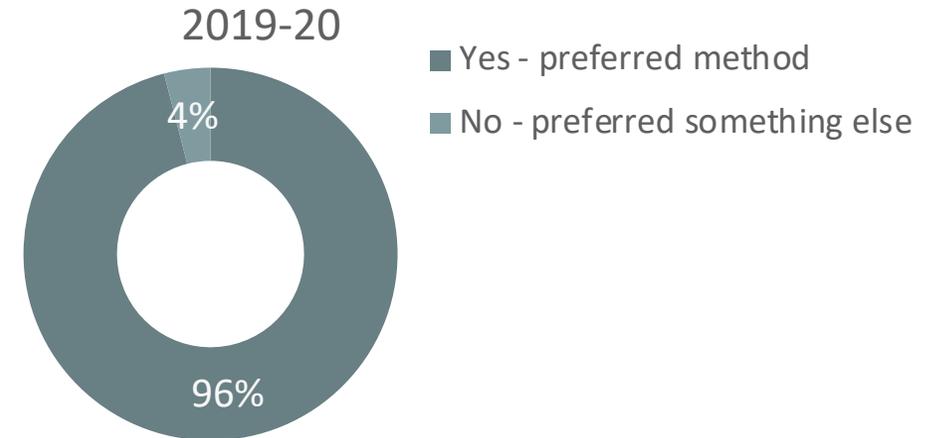
Transport

- Only 4% of respondents reported that they would have preferred to travel around the Cairngorms area by a different mode of transport.
- Most of these were seeking public transport options, such as bus (29%) or train (18%), or sustainable options, such as cycling (16%) or walking (10%).

Q25. Is travelling by [response from Q22] your preferred method of transport, or would you prefer to get around in some other way?
Q26. What would your preferred method of transport be?

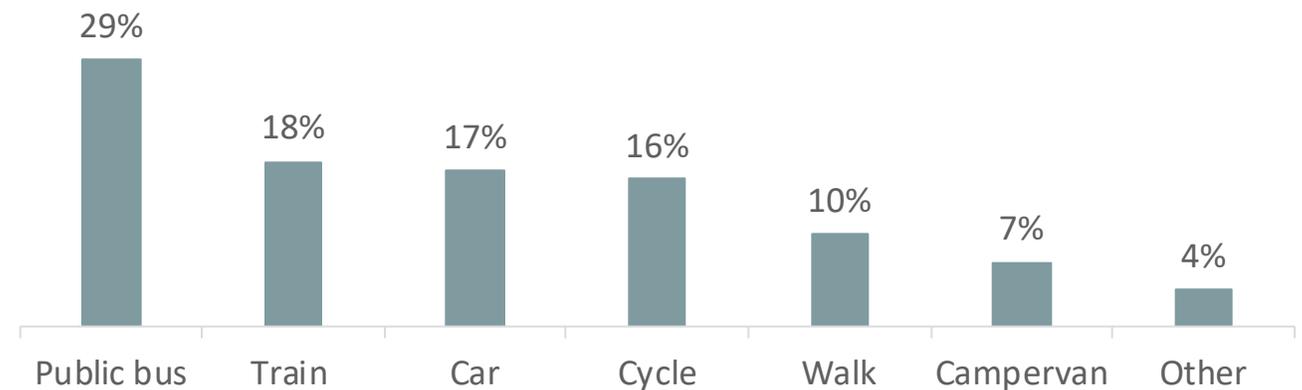


Did you use your preferred method of transport?



Base (All): 2,262

What would you have preferred?



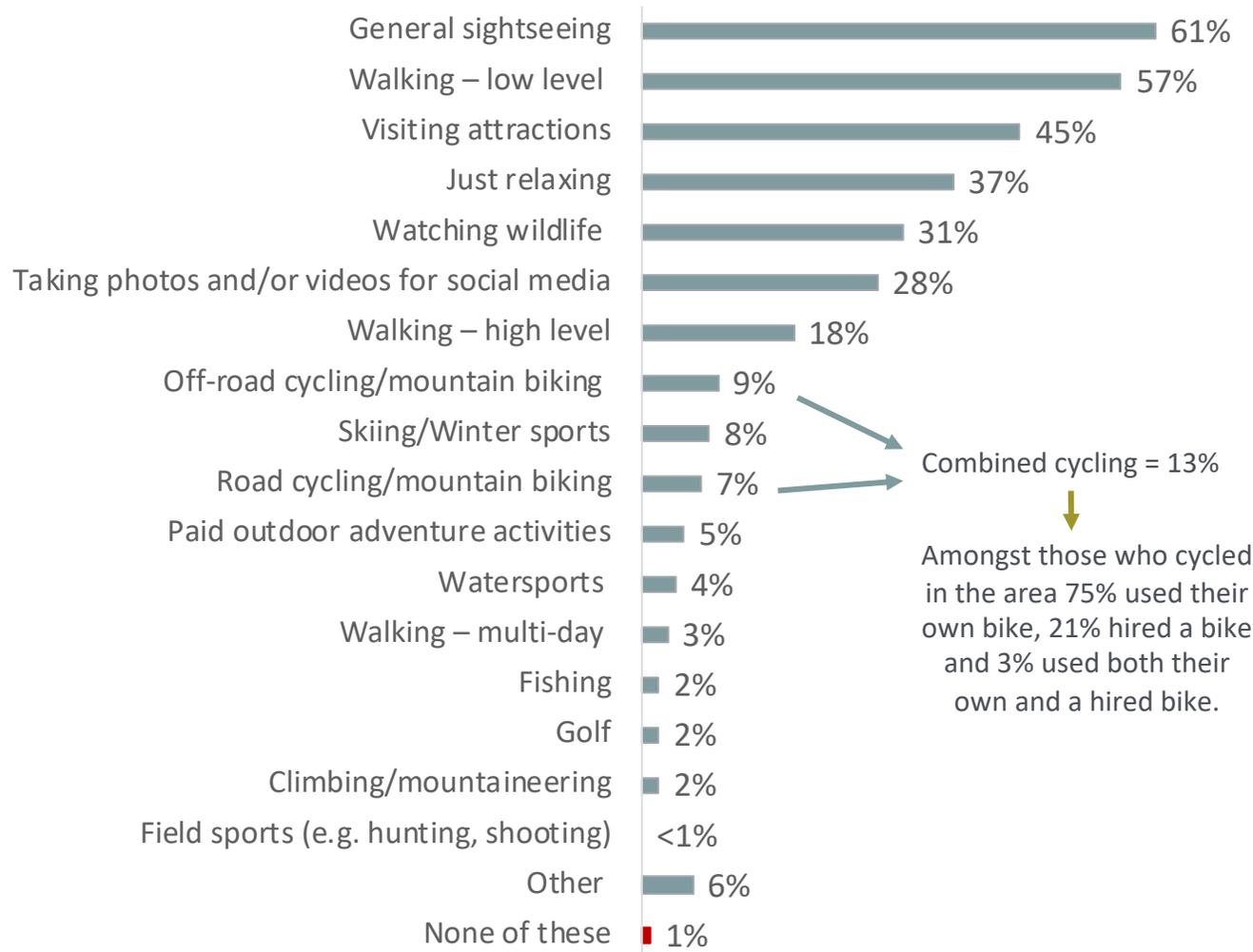
Base (those who preferred another method of transport): 90

Trip profile

Activities

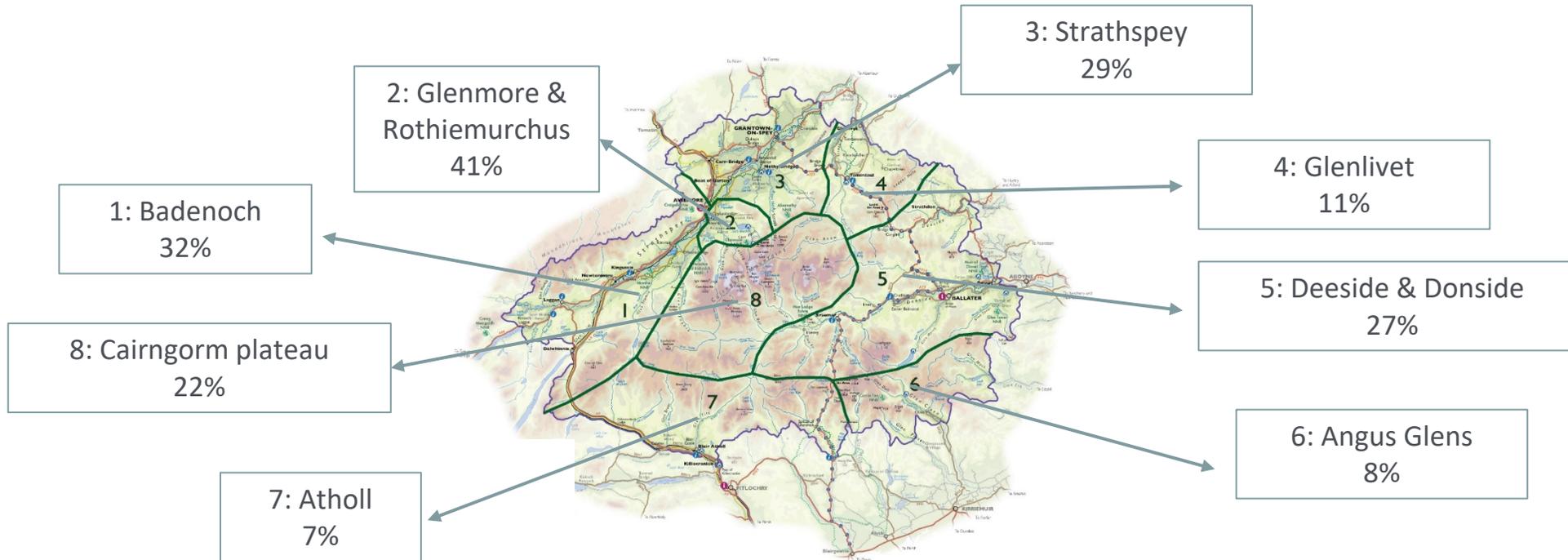
- The most popular activities mentioned by respondents correlate with the reasons for visiting the area – namely to enjoy the beautiful scenery by sightseeing (61%), low level walking (57%) and relaxing (37%). Almost half (45%) also mentioned going to specific attractions.
- Sporting activities were also mentioned by a number of respondents. These included high level walking (18%), cycling (13%), skiing/winter sports (8%) and water sports (4%).
- As we would expect, participation in winter sports such as skiing was far higher in winter (44%) and spring (18%), although it should be noted that sampling in the winter months was focussed on winter sports areas such as Cairngorm ski centre, the Lecht and Glenshee.
- Respondents visiting the Cairngorms area from the rest of the UK and overseas were more likely than those from Scotland to mention a range of activities, such as sightseeing, walking, watching wildlife and attractions. Overseas visitors (42%) and those from the rest of the UK (32%) were also more likely to take photos for social media than visitors from Scotland (19%).
- Participation in a number of activities was higher in 2019/20 than in 2014/15. For example, fewer respondents in 2014/15 mentioned sightseeing (56%), low level walking (44%), attractions (38%) and watching wildlife (12%).

Activities within the Cairngorms



Trip profile

Areas for walking and cycling



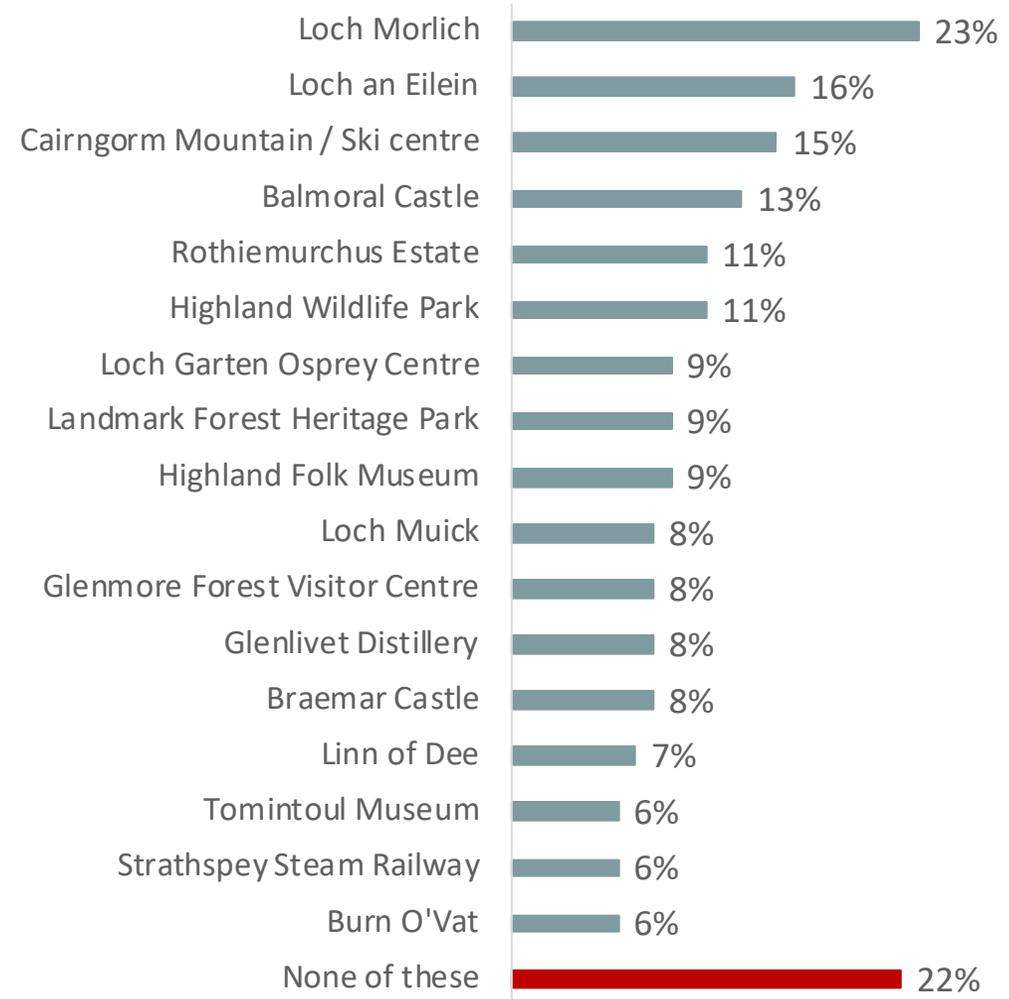
- Respondents who had been or planned to walk or cycle during their visit were asked in which areas of the National Park they had or intended to do these activities.
- The most popular location was Glenmore and Rothiemurchus (41%), although between a quarter and a third of respondents also mentioned Badenoch (32%), Strathspey (29%) and Deeside and Donside (27%).
- Glenmore and Rothiemurchus were particularly popular with visitors from the rest of the UK (51%) and Scotland (42%), while overseas visitors were more likely to mention Deeside and Donside (44%).
- It should be noted that responses to this question will be influenced by where respondents were interviewed and hence by the spread of the sample plan, which did focus on the areas with the highest numbers of visitors.

Trip profile

Attractions

- The majority of respondents (78%) visited at least one attraction during their trip to Cairngorms National Park.
- The most popular attractions tended to be those close to Aviemore, including Loch Morlich (23%), Cairngorm Mountain / Ski centre (15%), Loch an Eilein (16%), Rothiemurchus (11%), Glenmore Forest Visitor Centre (8%) and the Strathspey Steam Railway (6%).
- In eastern and central areas of the Park Balmoral Castle (13%), Braemar Castle (8%) and Linn of Dee (7%) were mentioned.
- Wildlife attractions, such as the Highland Wildlife Park (11%) and Loch Garten Osprey Centre (9%) also featured highly.
- Castles, distilleries and museums tended to be more popular with overseas visitors than those from Scotland and the rest of the UK, whereas Rothiemurchus and Landmark were more likely to be mentioned by visitors from Scotland and the rest of the UK than visitors from overseas.

Top attractions within the Cairngorms



Only attractions visited by 6% or more are shown.
A full listing can be found in appendices.

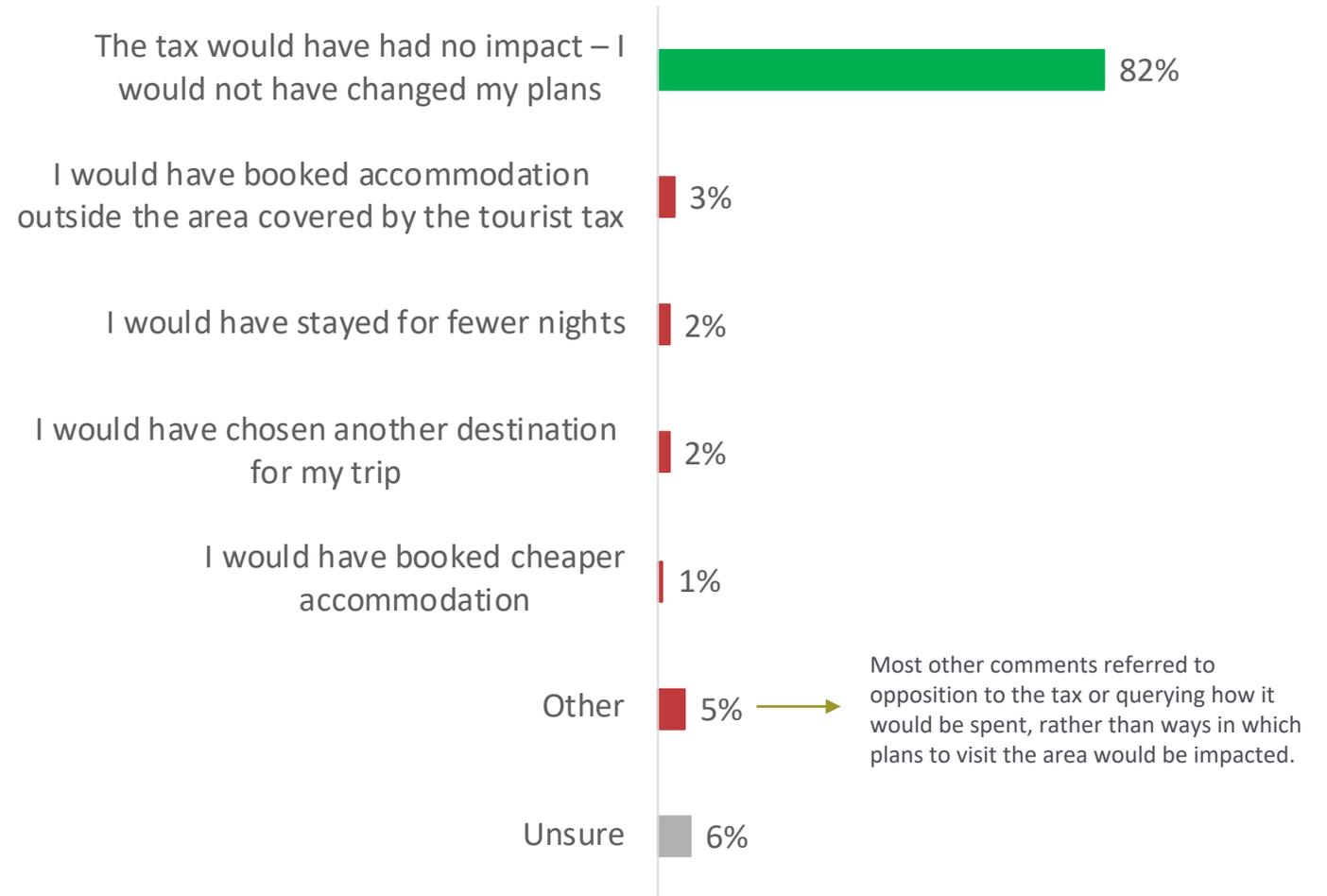
Trip profile

Tourist tax

- Overnight visitors who had stayed in paid for accommodation were asked to consider the likely impact on their plans of a levy or 'tourist tax' being charged.
- The majority reported that such a tax would not have changed their plans, however, just over one in ten (13%) reported some likely impact.
- Very small proportions of overnight visitors reported that they would have booked accommodation outside the area covered by the tax (3%), stayed for fewer nights (2%) or would have chosen a different destination altogether (2%).
- Visitors from overseas were more likely to state that a tourist tax would have no impact on their plans (92%) than those from Scotland (77%) or the rest of the UK (78%). Visitors from Scotland and the rest of the UK who did not say 'no impact' tended to say they were unsure rather than specify how they would change their plans, and were more likely to give 'other' responses.



Impact of possible tourist tax – Overnight visitors in paid accommodation



Q37. Some local authorities in Scotland are looking at options to charge an overnight visitor levy, sometimes known as a 'tourist tax'. If a charge of around £1 per adult per night had been in place when you were considering coming to the Cairngorms National Park, what impact would it have had on your decision to stay here?



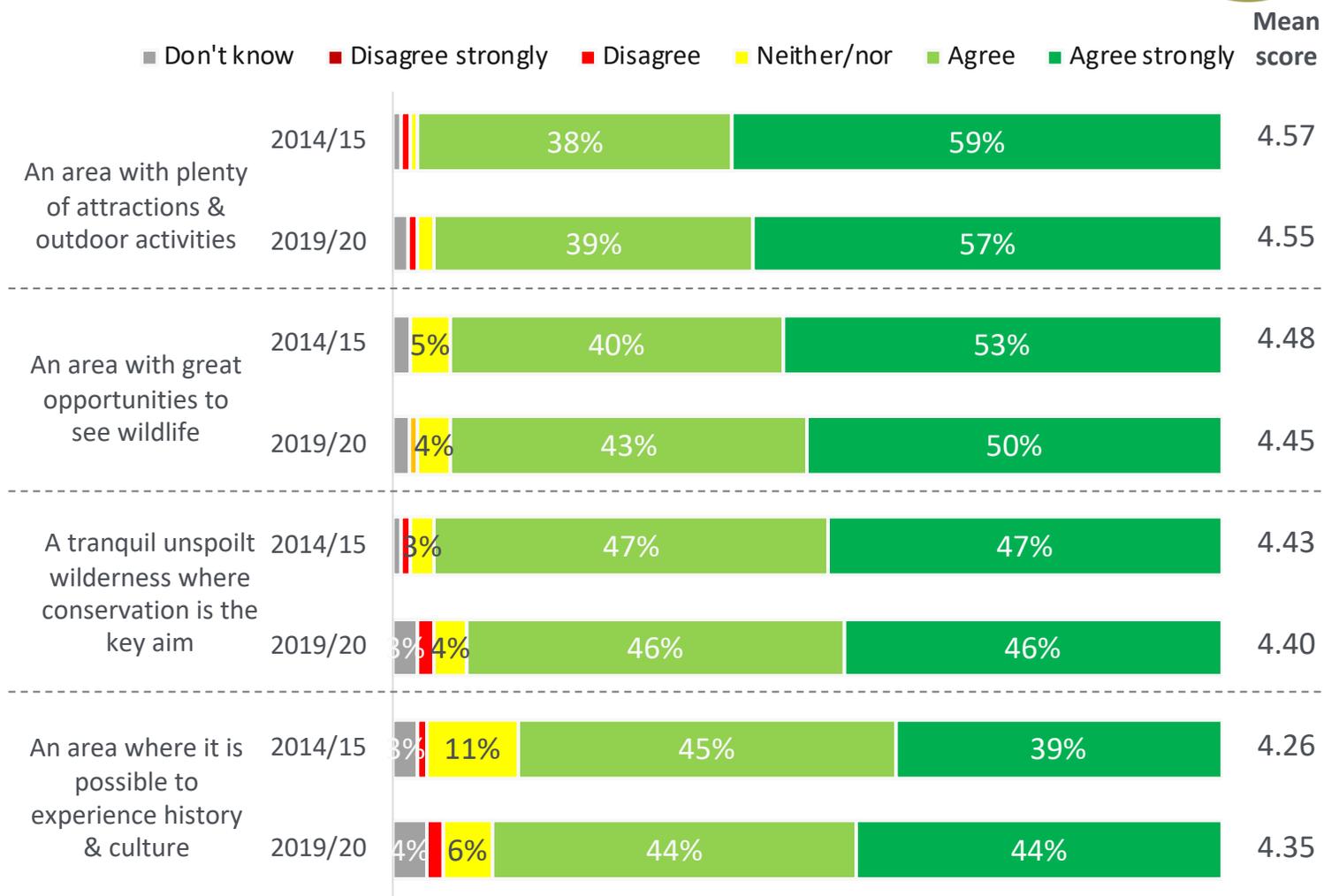
Evaluation of visit to Cairngorms National Park

Evaluation

Perceptions of the Park

- Attitudes towards Cairngorms National Park were overwhelmingly positive again in 2019/20; the majority of visitors agreed with all of the statements shown.
- In particular, strong agreement was highest for the park being an area with plenty of attractions and outdoor activities – 96% agreed overall and 57% agreed strongly.
- Similarly, the majority agreed that the Park offers great opportunities to see wildlife (93%), and it is a tranquil wilderness where conservation is the main aim (92%).
- Slightly fewer agreed that the Park is an area where you can experience history and culture, although the majority (88%) did still agree that this statement was true.
- Compared to 2014/15 there has been a very small decrease in those agreeing strongly that the Cairngorms is an area with great opportunities to see wildlife and an increase in those agreeing strongly that it is an area where you can experience history and culture.

Perceptions of Cairngorms National Park



Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.

Base (all visitors): 2014/15 2,207; 2019/20 2,191 43

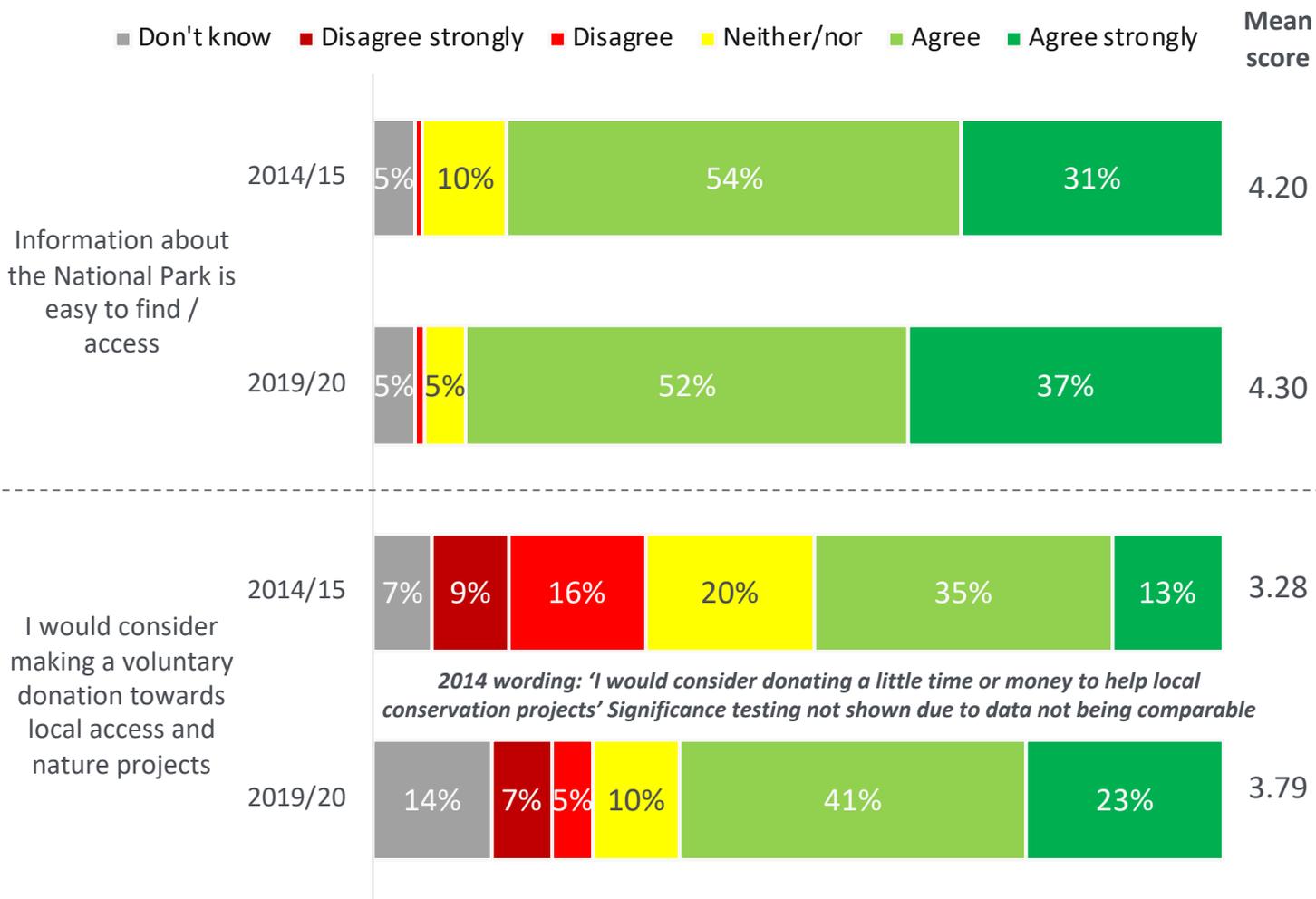
Q31. For each of the following statements, please tell me how much you agree or disagree that the statement describes the Cairngorms area.

Perceptions

Perceptions of the Park

- Nine in ten respondents agreed that information about the National Park is easy to find – although only 37% agreed strongly with this statement. There has been an improvement in perceptions of the availability of information since 2014/15 when 85% agreed overall and 31% agreed strongly.
- Almost two thirds of visitors (64%) stated that they would make a donation to local access and nature projects. This is higher than agreement for a similar statement that was used in the 2014/15 survey – ‘I would consider donating a little time or money to help local conservation projects’ – 48% agreed.
- Those most likely to agree that they would consider making a voluntary donation were in the higher socio-economic groups (ABC1 66%; C2DE 60%), males (67%; females 61%), under 65 year olds (65%; 57% 65+) and repeat visitors (67%; first time 58%). Overseas visitors were more likely to agree strongly (29%) than those from Scotland (20%) or the rest of the UK (21%) but there was no difference in overall agreement by country of origin.

Perceptions of Cairngorms National Park



Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.

Base (all): 2014/15 2,293; 2019/20 2,262 44

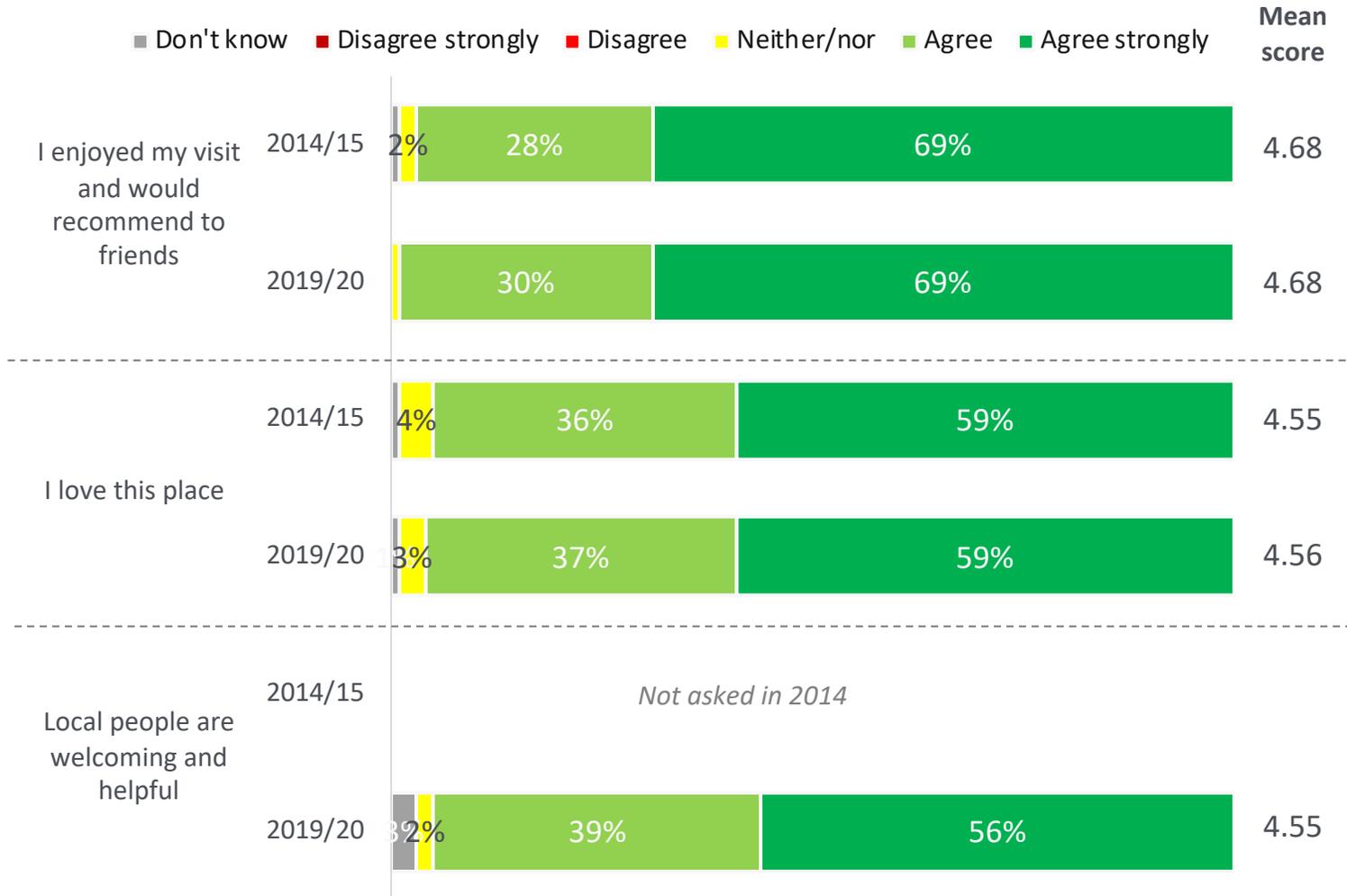
Q32. I would like to read out a number of statements which other visitors have made about the area. Please tell me how much you agree or disagree with each of these statements.

Evaluation

Enjoyment of trip

- The positive experience that the majority of respondents had during their trip is confirmed in the findings opposite.
- Almost all respondents agreed that they had enjoyed their visit and would recommend it to friends, with the majority (69%) agreeing strongly.
- Similarly, almost all agreed that they 'love this place' with 59% agreeing strongly.
- Agreement with both of these statements in 2019/20 is consistent with 2014/15.
- The vast majority of respondents also agreed that local people were welcoming and helpful, with more than half (56%) agreeing strongly.

Enjoyment of trip to Cairngorms National Park



Mean score calculated, whereby 1 is strongly disagree and 5 is strongly agree.

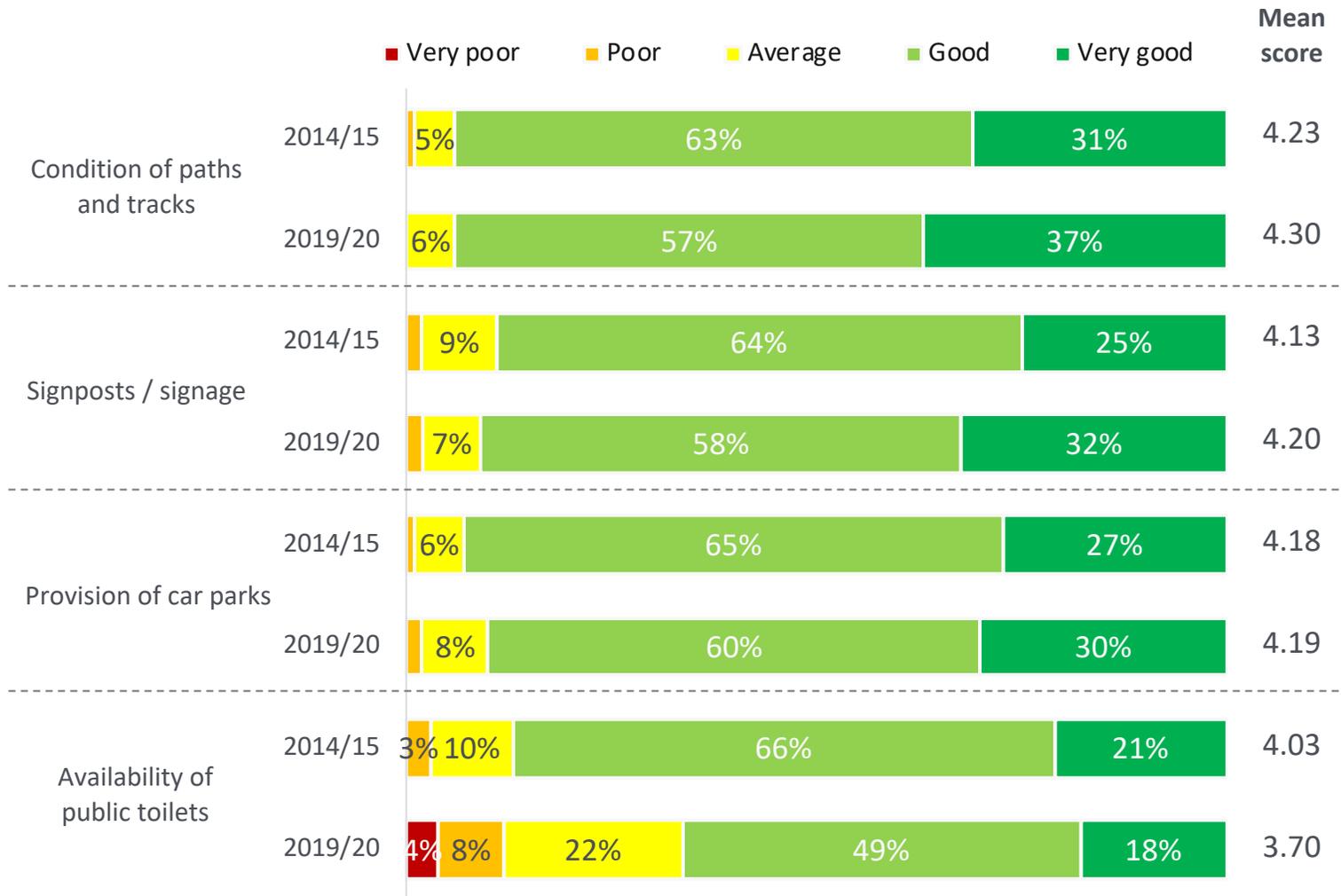
Base (all): 2014/15 2,293; 2019/20 2,262 45

Q32. I would like to read out a number of statements which other visitors have made about the area. Please tell me how much you agree or disagree with each of these statements.

Evaluation Facilities

- Respondents were asked to rate a number of facilities and amenities in Cairngorms National Park. The data shown here excludes those who did not use the facilities, i.e. those who responded 'not used/applicable'.
- The data show that the majority rated the condition of paths and tracks, signage, car parks and public toilets as good or very good.
- Paths and tracks, signage and car parks were rated as good or very good by a similar proportion of respondents, although paths and tracks received the highest rating overall. There have been improvements in the scores for these facilities since 2014/15, with higher proportions rating them as very good in 2019/20. There may, however, be some scope for further improvement by increasing the percentage 'very good' still further in future years.
- In 2019/20, 67% considered the availability of public toilets as good/very good overall, with only 18% rating this as very good. There has been a significant decrease in satisfaction with public toilets compared to 2014/15 when 86% rated it positively.

Ratings of facilities in Cairngorms National Park



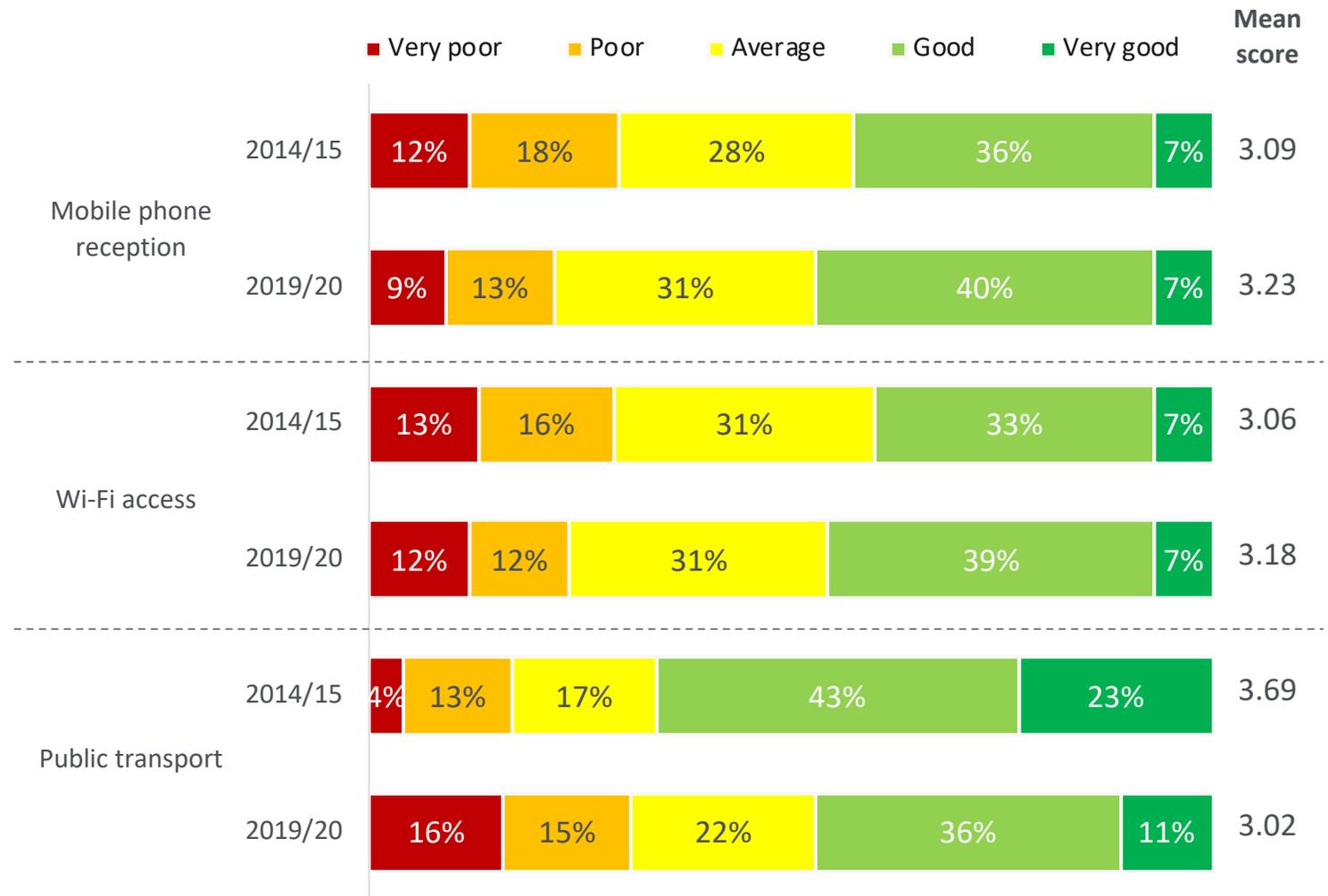
Mean score calculated, whereby 1 is very poor and 5 is very good.

Base (all who used facilities): 2014/15 1,769 – 2,220;
2019/20 1,837 – 2,152

Evaluation Facilities

- Just less than half of respondents (47%) gave a positive rating for mobile phone reception, with 22% rating this negatively. Very similarly, 46% gave a positive rating for Wi-Fi access, while 23% rated it negatively.
- Whilst there remains some negative perceptions of mobile phone and Wi-Fi access, ratings have improved since 2014/15.
- Although more people were positive about public transport (47%) than negative (31%) there was a significant number of respondents who rated this service negatively. Furthermore, satisfaction ratings for public transport have decreased significantly since 2014/15 when two thirds considered it good or very good.

Ratings of facilities in Cairngorms National Park



Mean score calculated, whereby 1 is very poor and 5 is very good.

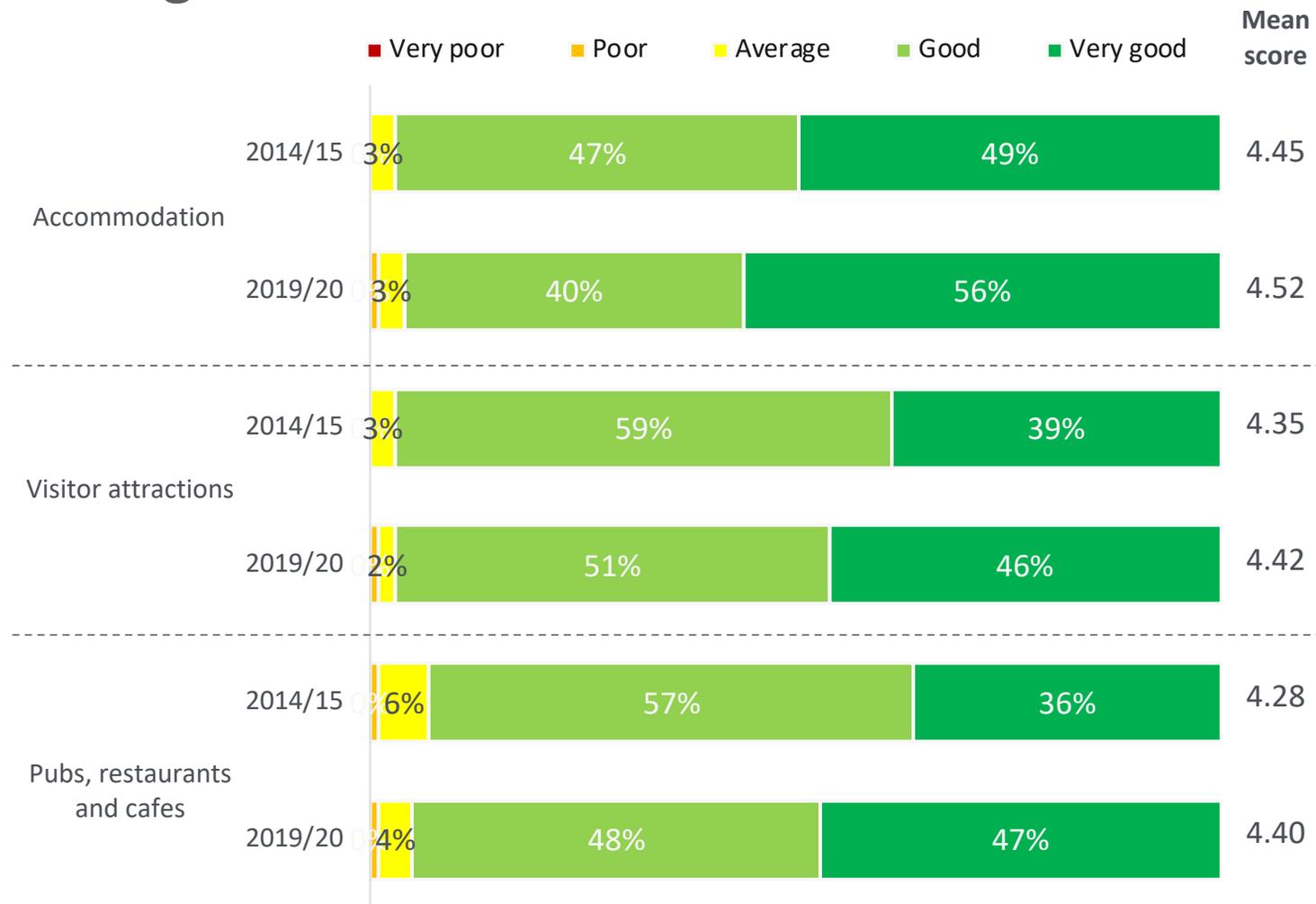
Base (all who used facilities): 2014/15 382 – 1,722;
2019/20 473 – 1,937

Evaluation

Customer service

- Almost all respondents rated the customer service they received from staff in accommodation, attractions and pubs, restaurants and cafes as good or very good.
- The highest rating was for staff at accommodation – 56% considered the service they received to be very good.
- There have also been improvements in ratings since 2014/15 for customer service across all three types.

Ratings of customer service in Cairngorms National Park



Mean score calculated, whereby 1 is very poor and 5 is very good.

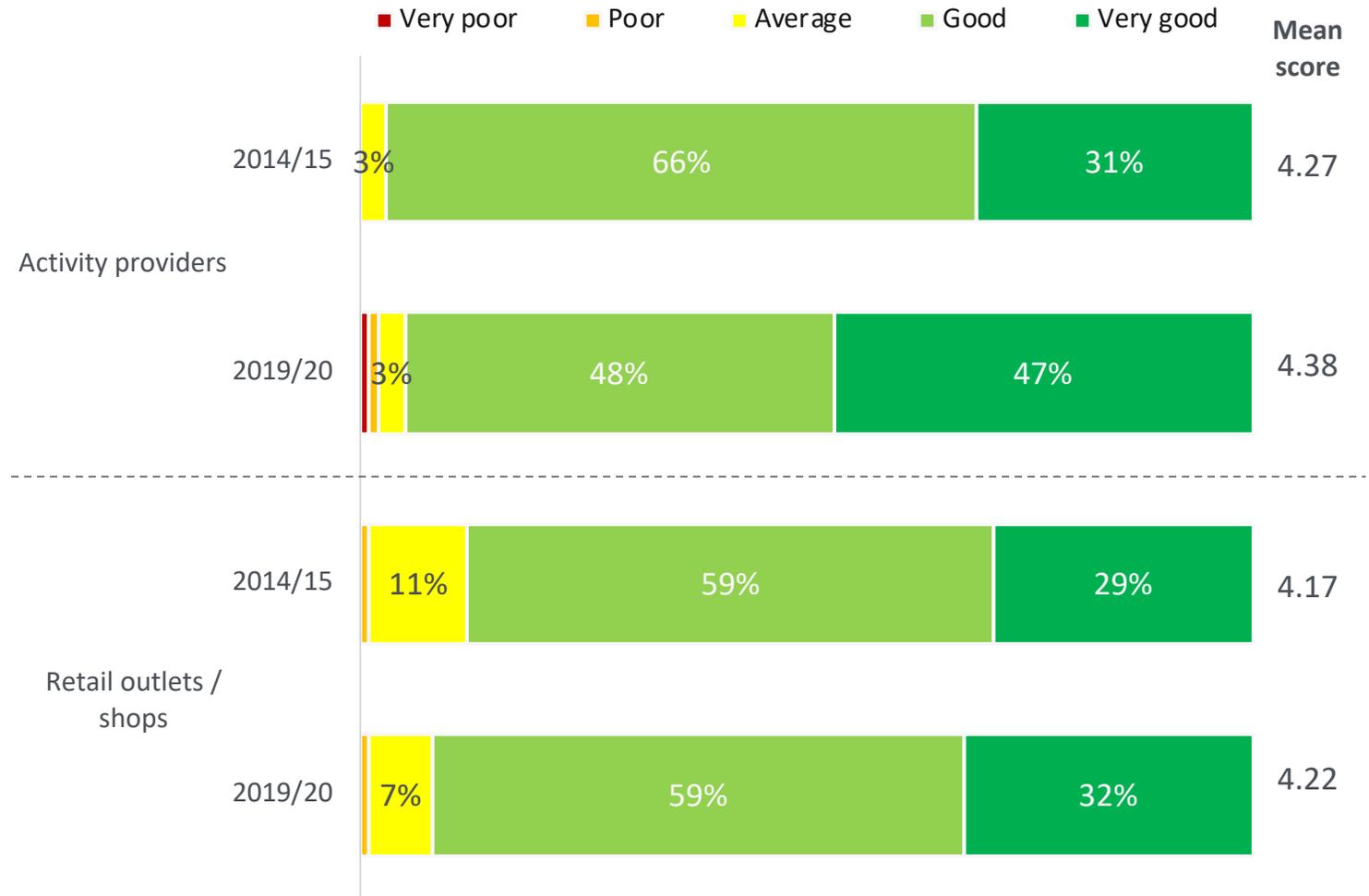
Base (all who used): 2014/15 1,259 – 1,712;
2019/20 1,232 – 1,788

Evaluation

Customer service

- Respondents were also asked to rate the customer service they received from activity providers and within shops. The majority again considered the service provided to be good or very good.
- There has been a significant improvement in those rating the service provided by activity providers as very good since 2014/15, from 31% to 47% in 2019/20.
- The rating of very good for retail staff in 2019/20 is consistent with 2014/15; however, the proportion overall rating the service positively has increased slightly (from 88% to 91%).

Ratings of customer service in Cairngorms National Park

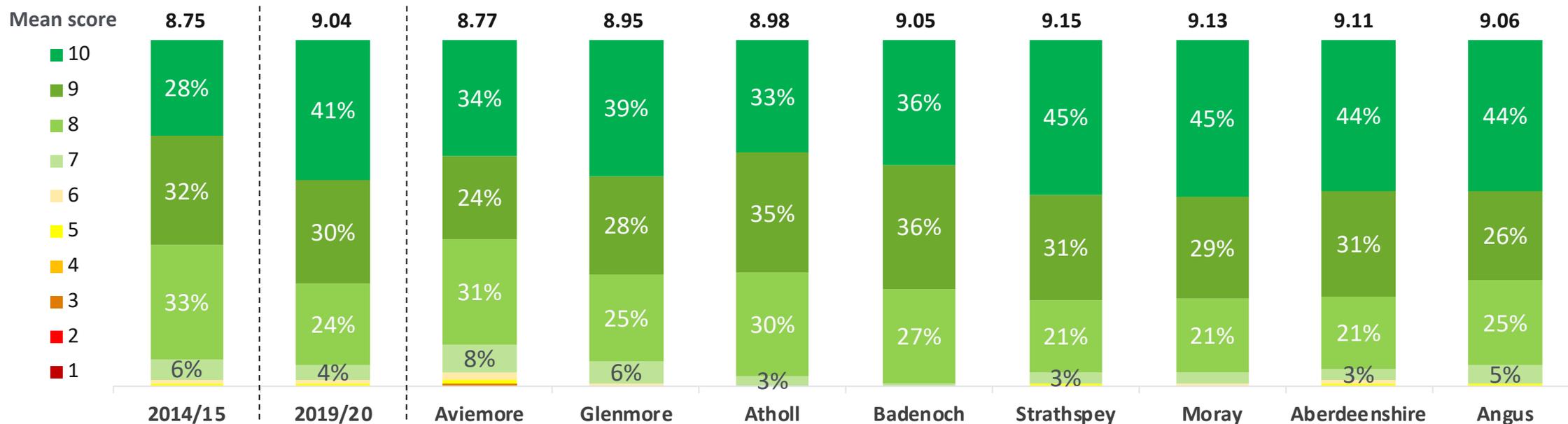


Mean score calculated, whereby 1 is very poor and 5 is very good.

Base (all who used): 2014/15 1,194 – 1,422;
2019/20 659 – 1,502

Evaluation of visit

Overall experience in Cairngorms – by area

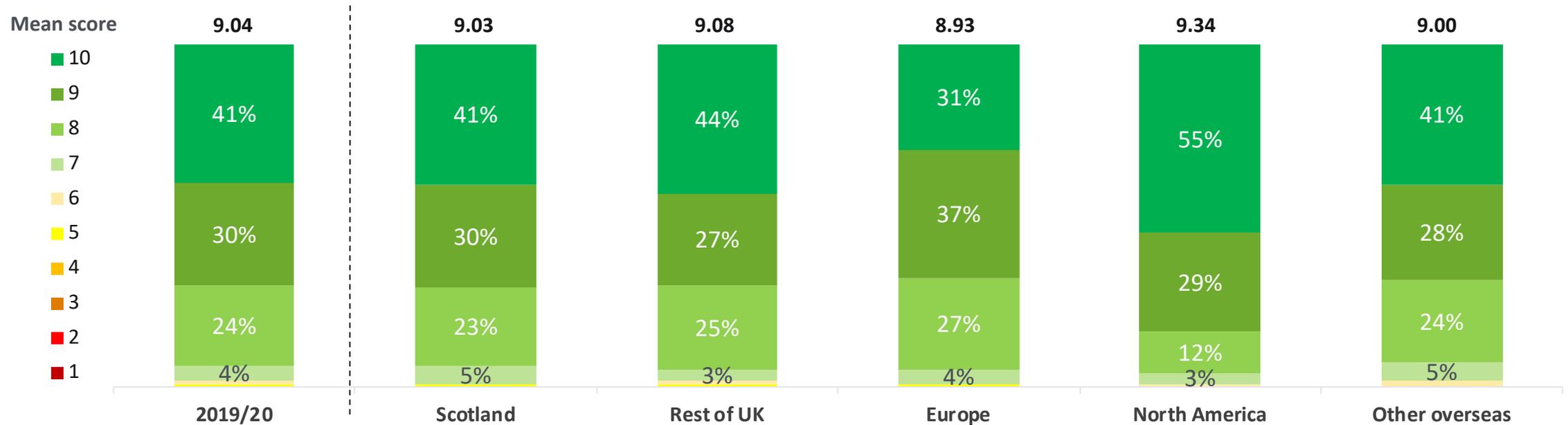


- When asked to provide a mark out of 10 for their overall experience in the Cairngorms area, 71% of respondents scored it with 9 or 10 and the mean score was 9.04.
- The represents a significant improvement on 2014/15 when 59% scored 9 or 10 and the mean score was 8.75.

- Scoring of the overall experience as consistently high across all areas of the Park; however, respondents interviewed in Strathspey (mean score 9.15) and Moray (9.13) were particularly positive.

Evaluation of visit

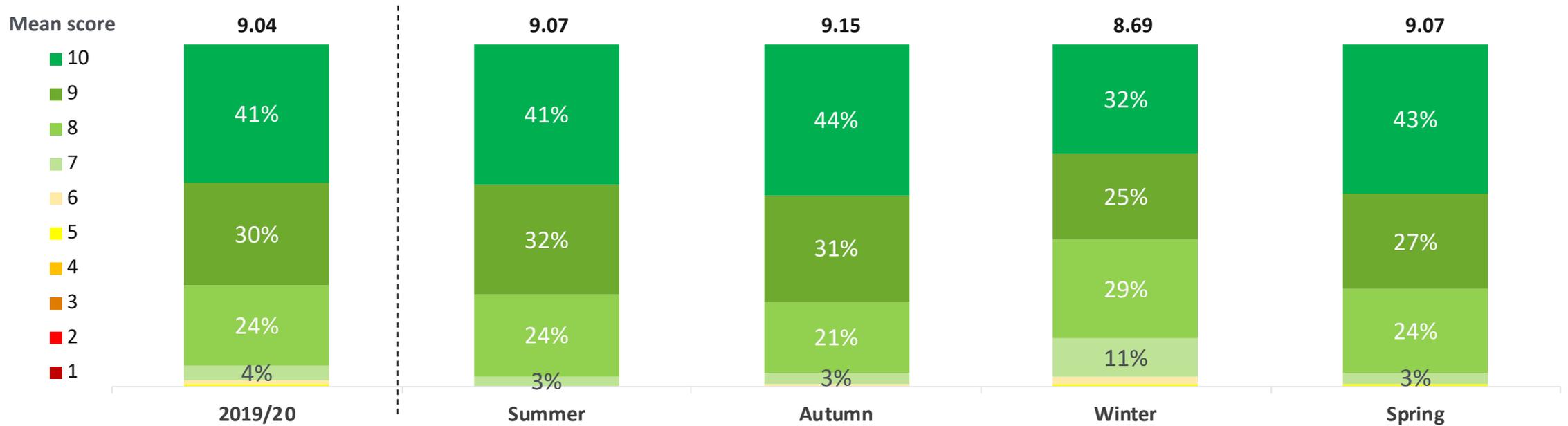
Overall experience in Cairngorms – by origin



- Visitors from Scotland and the rest of the UK tended to give similar scores for their overall experience, with an overall average of over 9 out of 10.
- North American visitors were the most positive about their experience of the Cairngorms area – over half (55%) gave a perfect 10 out of 10 score and the average was 9.34.
- Visitors from Europe were also overwhelmingly positive but tended to be less likely to give a score of 10 out of 10 compared to visitors from the UK and other overseas regions.

Evaluation of visit

Overall experience in Cairngorms – by season

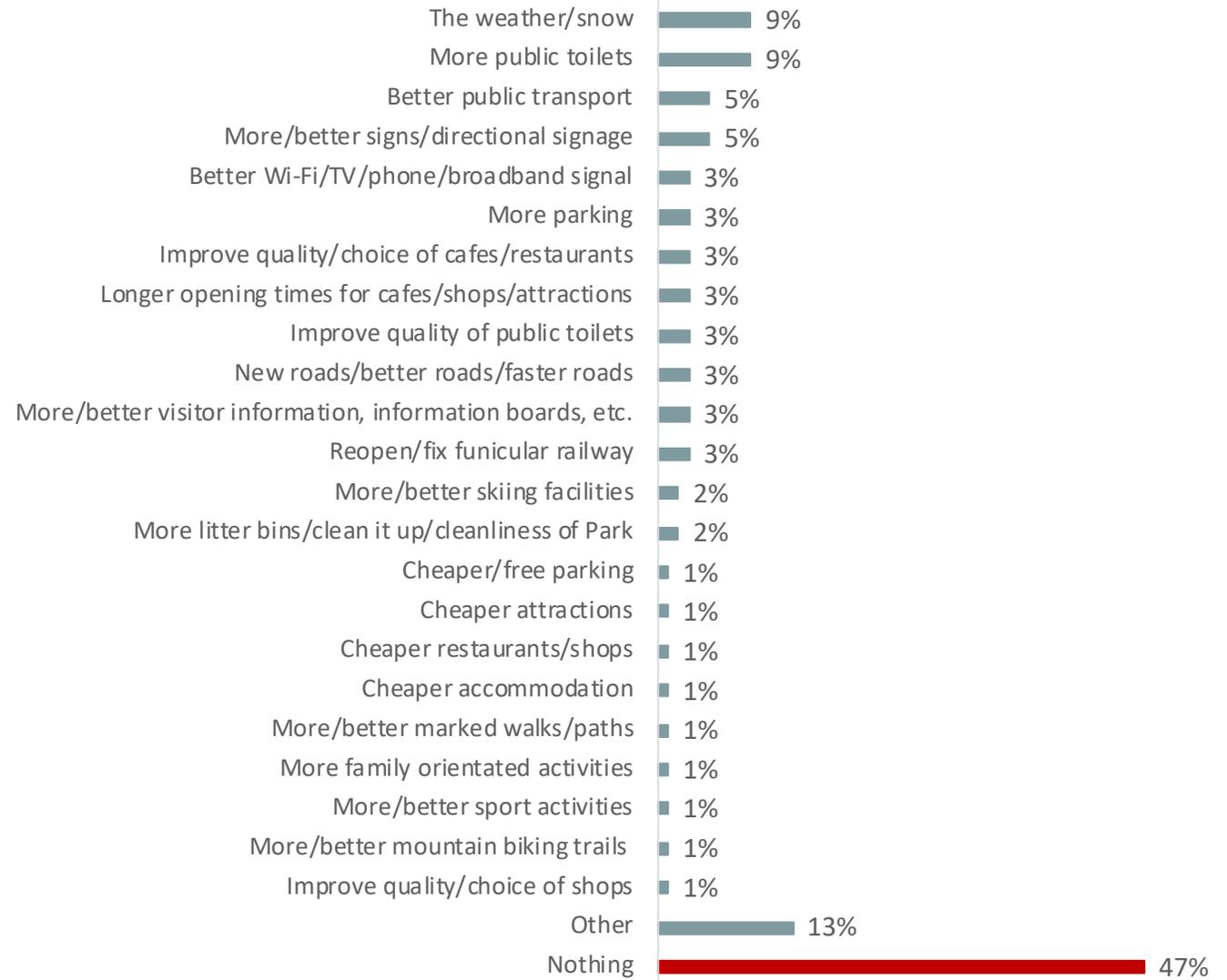


- Satisfaction ratings were generally consistent throughout the year, although winter visitors were less likely to give a 10 out of 10 score. This is likely to be due to the prevalence of visitors participating in snow sports in winter which are heavily weather dependant. The closure of the funicular railway in the Cairngorm ski area may also have prevented some people from giving a higher score in winter.

Evaluation Improvements

- When asked if there was anything that could have been improved to make their visit to the Cairngorms more enjoyable, 53% of respondents made a suggestion.
- No one suggestion stood out, instead a number of different ideas were provided. Almost one in ten mentioned a need for more public toilets. A small minority (3%) also felt the quality of public toilets could be improved – these findings back up the previous finding that satisfaction with public toilets have decreased in 2019/20.
- Similarly, satisfaction with public transport was lower in 2019/20 than in 2014/15, while 5% of respondents also made a suggestion in relation to improving this service.
- Responses within the ‘other’ category included car parking issues (27 respondents), more facilities for dogs/dog friendly (20 respondents), more indoor/wet weather facilities (20 respondents), and issues with toilets, e.g. should not be charged, changing facilities, etc. (18 respondents).

Suggested improvements to make visit more enjoyable



Q33. What, if anything, could be improved to make your [visit to/day out in] the area more enjoyable?



Final summary and conclusions

Summary and conclusions

Overview



- The primary objective of the 2019/20 Cairngorms National Park visitor survey was to provide robust data to facilitate understanding of visitors to the Park:
 - Who is visiting the Park?
 - Why did they choose to come to the Cairngorms?
 - What type of trip did they have and what did they do during their visit?
 - How satisfied were they with their visitor experience?
- A total sample of 2,191 visitors and 71 residents (who were on a leisure trip) were interviewed over 11 months from May 2019 to March 2020. Interviewing was conducted at 40 sampling points across the Cairngorms National Park.
- Data gathered during the survey was compared to the survey conducted in 2014/15.
- It is important to note that since the 2019/20 survey was conducted the worldwide coronavirus pandemic has had a huge impact on the tourism sector both here in the UK and globally. It is currently very difficult to predict what the longer term consequences of this crisis will be for tourism in the National Park; however, the conclusions noted here refer to both shorter term opportunities for the domestic market and longer term ambitions looking ahead to when international tourism can return.

Summary and conclusions

Visitor profile



- The demographic profile of visitors in 2019/20 was very consistent with 2014/15:
 - There were slightly more males (52%) than females (48%) interviewed.
 - There was a broad spread of age groups with no particular bias to older or younger visitors; however, only a small proportion were within the youngest age group of 16 to 24. The proportion of younger visitors (16 to 34 years) was higher in the winter months, due to the attraction of snow sports.
 - Visitors were more likely to fall within the more affluent AB and C1 socio-economic groups (70%) than the C2 and DE groups (27%).
- Three quarters of visitors were from within the UK, with almost half from Scotland and a quarter from other parts of the UK.
- Europe was the next most prevalent market, accounting for 17% of visitors, including many from Germany, France and the Netherlands.
- North Americans accounted for 5% of all visitors, while 4% came from other parts of the world, most commonly Australia and New Zealand.
- The proportion of overseas visitors was higher in 2019/20 (27%) than in 2014/15 (22%).
- Over a third of visitors were visiting the Cairngorms National Park for the first time in the last five years in 2019/20.

Summary and conclusions

Motivations to visit the Cairngorms area



- The primary motivations for visiting the Cairngorms were to enjoy the scenery, to experience peace and relaxation, to see wildlife and to participate in walking. Secondary motivations were more active pursuits, such as hillwalking, cycling and skiing/snowboarding. One in five visitors also reported that their reason for visiting the Cairngorms was to see a particular attraction.
- The reasons for choosing to visit the Cairngorms in 2019/20 were consistent with 2014/15, although there has been an increase the proportion mentioning wanting to enjoy the beautiful scenery.
- Almost nine in ten visitors were aware of the National Park status of the Cairngorms area, and for more than half of these this status was important to their decision to visit. The importance of national park status has increased significantly since 2014/15 when 36% of aware respondents rated it as important.
- As well as the more rational reasons for visiting, it was also important to understand what, if anything, inspired the visit. Inspiration can come from a number of sources including social media, films, books, TV and travel features. Inspiration is particularly important in attracting first time visitors; it can often be something like a book or film that sparks the more emotional desire to visit a destination rather than the practical activities and attractions it offers. Many locations throughout Scotland have benefited from visitors being inspired by fictional films, TV and books, such as Outlander, Harry Potter and Shetland, as well as travel features and wildlife programmes.
- Three in ten visitors reported being inspired by something they saw, read or heard, the most common being a travel feature, a book, TV programme, online video content and/or recommendations from others. However, over half of overseas visitors (59%) and first time visitors (54%) were influenced by at least one of these sources, most often a travel feature.

Summary and conclusions

Trip profile



- The largest proportion of respondents (53%) were visiting the Cairngorms with one other person, while one in ten were visiting alone and 38% were visiting with 3 or more people in their group.
- Over one quarter of visitors had children in their party, but this was higher amongst visitors from Scotland (33%). Amongst visitors from the UK, one fifth had brought their dog.
- The party composition in 2019/20 was very similar to 2014/15.
- The vast majority of respondents were visitors from outside the Park area (97%) with only 3% residents. One in five were on a day trip, while 77% were on a holiday or short break. Most of those who were on a holiday or short break (83%) were staying overnight in the Park area; this equates to two thirds of all visitors. On average, visitors stayed for 5 nights in the Park area. The proportion of overnight visitors staying in the Park area and the average length of stay were consistent with 2014/15.
- One third of overnight visitors stayed in self-catering accommodation, such as cottages, chalets, Airbnb, time share and second homes. Just over a quarter stayed in a hotel, while a further quarter chose camping and caravanning options. There has been an increase in those camping/caravanning compared to 2014/15.
- Car was the most frequently mentioned transport option – over four fifths of visitors travel to the Cairngorms by car, with a further 8% travelling by campervan. Almost all respondents reported that they used their preferred method of transport.
- Activities undertaken by visitors during their visit mirror their reasons for visiting – general sightseeing, walking, visiting attractions, relaxing and watching wildlife were the most often mentioned. The most popular attractions tended to be those close to Aviemore, including Loch Morlich, Cairngorm Mountain, Loch an Eilein and Rothiemurchus. Balmoral Castle and the Highland Wildlife Park were also mentioned by one in ten visitors.

Summary and conclusions

Evaluation of visit



- The majority of visitors rated various aspects of their trip to Cairngorms National Park very highly.
- Most agreed that the Park is an area with plenty of attractions and outdoor activities, and great opportunities to see wildlife, as well as being a tranquil unspoilt wilderness.
- Ratings of many facilities within the Park were also very positive. In particular, paths and tracks, signage and car parks were highly rated, and perceptions had improved since 2014/15.
- The majority were also happy with the availability of public toilets, although there has been a decrease in satisfaction since 2014/15.
- Satisfaction ratings were lower for digital connectivity (mobile phone reception and access to Wi-Fi) although there have been small improvements in these ratings since 2014/15.
- Less than half of respondents gave a positive rating for the availability of public transport, and this has decreased significantly since 2014/15 when two thirds of respondents rated it positively.
- Ratings of customer service across various providers were consistently very high, with several improvements in the proportions rating service as 'very good' compared to 2014/15. Indeed, almost all respondents (95%) agreed that local people were welcoming and helpful, with more than half (56%) agreeing strongly.
- When asked to rate their overall experience out of 10, the average score across the total sample was 9.04, with 41% giving a perfect 10 out of 10. This is again an improvement on 2014/15 when the average score was 8.75 and 28% gave 10 out of 10.

Summary and conclusions

Recommendations



- The domestic Scottish market was very strong for the Cairngorms National Park in 2019/20, with many of these visitors in the affluent socio-economic groups and therefore likely to be high spending. This means that the Park should be in a good position to attract staycation visitors from Scotland in the short term. There is scope, however, to increase the number of visitors from England and other parts of the UK to help offset the loss of international visitors due to the coronavirus pandemic. Promotion of transport routes to the Cairngorms, such as flights to Inverness, could help to encourage visitors from other parts of the UK, especially those who do not wish to make a long journey by car. Improvements in public transport connectivity within the Park may also encourage visitors who do not wish to travel by car.
- As well as encouraging more visitors from other parts of the UK, improvements to public transport connectivity could help to decrease the currently high proportion of visitors who travel to the Cairngorms by car. Sustainability and green tourism are likely to become increasingly important in future years and therefore consideration should be given to ways in which this could be improved within the Park.
- In the longer term, more could be done to encourage visitors from overseas. Overseas visitors were particularly interested in historical and cultural attractions and distilleries; promotion of these within the Park would therefore help to increase these markets. The most appealing attractions for international visitors tended to be on the eastern side of the Park, such as Balmoral Castle and Braemar Castle, so promotion of attractions on the western side could encourage more international visitors throughout the Park.
- Connecting the National Park with more potential sources of inspiration, such as social media, TV, film and travel features may also encourage future visits. For example, guides to film/TV locations, PR to encourage travel features about the Park and links with social media influencers.
- There is also scope to improve ratings of digital connectivity across the Park, for example, accommodation providers and other venues such as restaurants and cafes should be encouraged to ensure good Wi-Fi access. Ratings of public toilet facilities could also be improved with greater availability and improved quality.
- Ratings of customer service were particularly positive. Providers should be congratulated on the warm and friendly service they provide visitors and encouraged to keep up the good work.



Appendices

Appendix: Attractions visited

Attractions	2019/20
Loch Morlich	23%
Loch an Eilein	16%
Cairngorm Mountain / ski centre	15%
Balmoral Castle	13%
Highland Wildlife Park	11%
Rothiemurchus estate / visitor centre	11%
Loch Garten Osprey Centre (RSPB)	9%
Highland Folk Museum	9%
Landmark Forest Heritage Park	9%
Braemar Castle	8%
Glenlivet Distillery	8%

Attractions	2019/20
Loch Muick	8%
Glenmore Forest Visitor Centre	8%
Linn of Dee	7%
Tomintoul Museum	6%
Strathspey Steam Railway	6%
Burn O'Vat	6%
Dalwhinnie Distillery	5%
Cairngorm Reindeer Centre	5%
Blair Castle	4%
Corgarff Castle	4%
Royal Lochnagar Distillery	4%

Attractions	2019/20
Speyside Heather Centre	4%
Grantown Museum	3%
Glenshee ski centre	3%
Insh Marshes	2%
Ruthven Barracks	2%
Uath Lochans	2%
Killiecrankie visitor centre	2%
Braemar Highland Heritage Centre	1%
Leault Farm Working Sheepdogs, Kincaig	<1%
Other	11%
None of these	22%

Technical Appendix



- The data was collected by CAPI interview.
- The target group for this research study was visitors to the National Park (including residents on a leisure trip).
- The target sample size was 2,500, and the final achieved sample size was 2,262. The reason for the shortfall was the need to halt interviewing in March 2020 due to the coronavirus outbreak.
- Fieldwork was undertaken between May 2019 and March 2020.
- Respondents were selected using probability random sampling, where interviewers selected every n^{th} person passing their pre-selected sampling point.
- In total, 15 interviewers worked on data collection.
- Each interviewer's work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by email or telephone) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where email/telephone details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.
- The sample size of 2,262 provides a dataset with an approximate margin of error of between $\pm 0.41\%$ and $\pm 2.06\%$, 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 CAPI questionnaires these checks include:
 - Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
 - Using our analysis package SNAP, data received via over-the-air synchronisation is imported from our dedicated server.
- 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.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

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