



# **MOURNE AREA OF OUTSTANDING NATURAL BEAUTY**

## **VISITOR SURVEY**

### **REPORT**

**December 2005**





## **INTRODUCTION**

In 2004 Mourne Heritage Trust secured funding for the implementation of a visitor monitoring programme from the Mourne Natural Resources Rural Tourism Initiative. The visitor surveys will provide information about visitors to the area and examine the activities they undertake whilst in Mourne AONB. It will also be used to obtain their views on the tourism product on offer. The project is planned to run over three years and commenced in June 2004.

Mourne Heritage Trust commissioned Research and Evaluation Services (RES) to undertake the large-scale visitor survey and this report presents the findings from the 2005 research.

## **METHODOLOGY**

Working in conjunction with Mourne Heritage Trust, RES designed a questionnaire in 2004 to be used in the research. The 2005 survey involved the same questionnaire with the minor changes to question 8 and 16 where the term "hill walking" is used this now reads as walking but will have a definition to state that this does not refer to walking around the town.

In total 1,250 surveys were completed in 14 different locations throughout Mourne AONB. All surveys were completed between July and September 2005.

In total 52% of respondents were male, 48% female and 9% were in the age group 16-24, 34% were aged 25-39, 40% were aged 40-59 and 16% were aged over 60. Three quarters of respondents (79%) were from Northern Ireland and the ethnic background of the majority of respondents (99%) was white.

## **RESULTS**

Visitors were initially asked what was the main purpose of their visit to Mourne AONB. The majority (60%) stated that they were on a day trip to the area and 35% stated that they were on holiday. In total 61% of respondents stated that they would be staying in the area for up to one day. Overall 29% stated that they would be staying for up to a week and 9% stated that they would be staying in the area for more than a week.

The majority of respondents (95%) either drove a car / van to the Mourne area that day or were the passenger in a car. Other methods of transport used include walking, coach trip, motorcycle and bicycle.

31% stated that they would be visiting one location in the Mourne on this trip and 44% stated that they would be visiting 2-3 locations. The most commonly mentioned locations were Newcastle town (58%), Tollymore Forest (24%) and Mourne Uplands (24%).

The most commonly mentioned activities that respondents stated they would be participating in during this visit were: walking (82%); visit towns / villages (53%); visiting bars / restaurants (46%); and visit beach / swimming (35%).



Just under half of all respondents (43%) stated that they would be aware of how to access all activities in the area and 27% stated that they would know how to access 'most of them'.

In total 39% of respondents thought that there should be additional facilities in the area. Suggestions included: improved toilet facilities; more coffee shops, restaurants, pubs; indoor leisure facilities; and children's parks and playgrounds.

Respondents were asked to provide information regarding their estimated spend in the Mournes area during their visit. Most of participants (38%) stated that they would be spending up to £30 in the area. In total 10% stated that they would not be spending anything.

Respondents were then asked to state how satisfied they are with various aspects of the Mournes area. All respondents (100%) were either 'very satisfied' or 'quite satisfied' with the scenery in the area, 92% were satisfied with car parking and 90% were satisfied with the condition of the natural environment. Overall 90% were satisfied they were getting value for money and 84% were satisfied with public access to the countryside. Satisfaction was lowest with the provision of tourist information (54% satisfied) and with toilet facilities in the area (60%). It must be noted however that there were significant differences in these ratings across locations. For example, 90% of visitors at Leitrim Lodge were satisfied with the provision of tourist information.

In total 63% of respondents stated that they would definitely return to the Mournes area during the next 12 months and 26% stated that they would be 'quite likely' or 'very likely' to return to the area in the next 12 months.

Those respondents who stated that they would be unlikely to return to the area (n=95) were asked the reason for this. The main reason given (54%) was that respondents would not be in Northern Ireland again in the next 12 months.

Those respondents who stated that they would be in the area again were asked to state what activities they would be likely to participate in during that visit. The main activities that would be walking (87%), visiting towns / villages (63%), visit bar / restaurant (56%) and visiting the beach / swimming (46%).

In total 77% of respondents knew about the area because they had been before and 28% stated that they got information through word of mouth. Other sources include TIC, brochures and Internet although each of these was used by less than 7% of the sample.

Overall satisfaction of the visitors to Mourne AONB was high with 96% of respondents stating that they were either 'very satisfied' or 'quite satisfied' with the area. The main reason given for satisfaction is the natural beauty in the area.

Finally respondents were asked to comment on their perception of crowding at the areas they had visited in the Mournes. In total 80% stated that they did not think that the area was over crowded at all, 14% stated that it was 'not really over crowded', 3% stated that it was 'a little over crowded' and only 1% stated that it was 'very over crowded'.



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## 1.0 INTRODUCTION

Tourism provides a major opportunity for growth in the Mourne economy. During the 30 years of the 'troubles' in Northern Ireland, tourism has suffered. As a result investment in tourism dropped, leaving the quality of the tourism infrastructure well below what the modern tourist expects.

To cater for the increased number of tourists, Mourne Heritage Trust, Department of Agriculture, local Councils and the Northern Ireland Tourist Board have been working with many local organisations in order to provide new facilities for visitors. Projects which have taken place include the development of cycle paths, gateway information centre, interpretation panels placed at key visitor sites, and new accommodation.

The Mourne Heritage Trust, ('the Trust') the organisation responsible for the management of Mourne AONB, is working with District Councils and other local partners to develop a sustainable long-term approach to tourism.

In 2004 Mourne Heritage Trust secured funding for the implementation of a visitor monitoring programme from the Mourne Natural Resource Rural Tourism Initiative. This project will collate both quantitative information on visitor numbers through use of electronic counter equipment and also qualitative information via visitor surveys. The visitor surveys will provide information about visitors to the area and examine the activities they undertake whilst in the Mourne. It will also be used to obtain their views on the tourism product on offer. The project is planned to run over three years and commenced in June 2004.

In June 2005 RES undertook the second year of the visitor survey and report on the findings.

Chapter 2 of this report details the methodology employed to conduct the research together with background information on the respondents taking part in the survey. Chapter 3 provides the findings from the survey and Chapter 4 provides a summary.

It should be noted that due to rounding, figures in the tables highlighting the results might not always add to 100%.



## **2.0 METHODOLOGY**

In this section the methodology employed to conduct this research is discussed and a profile of respondents is provided.

### **2.1 QUESTIONNAIRE DESIGN**

Working in conjunction with Mourne Heritage Trust, RES designed a questionnaire to be used in the research.

The areas included in the questionnaire are summarised below:

- Composition of group / country of origin;
- Distance travelled and method of transport;
- Purpose of visit;
- Time Spent in area;
- Areas visited;
- Activities undertaken;
- Money spent;
- Satisfaction with various aspects of the Mournes;
- Likelihood of returning;
- Overall satisfaction; and
- Views on crowding.

The questionnaire used is included in Appendix 1.

### **2.2 SAMPLE SIZE AND SELECTION**

In total 1,250 surveys were completed in 14 different locations throughout Mourne AONB. All surveys were completed between July and September 2005.

In terms of sample selection, random sampling was employed for each survey. Every fifth person (over the age of 16) to pass the interviewer was approached and asked if they would be willing to participate in the research<sup>1</sup>.

In discussion with the Trust it was established that neither residents of Mourne AONB would be included in the research, nor those who were in the area that day due to work reasons. A number of screening questions were therefore included at the start of the interview.

In total 14 sites were identified throughout Mourne AONB from which interviews would be undertaken. The number of completed interviews at each site is detailed in Table 2.1

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<sup>1</sup> In some areas however the numbers of visitors to the facility were very low therefore all visitors at these locations were asked to participate in the research.



| <b>Table 2.1: Location for Interview</b> | <b>Number of Completed Interviews</b> |
|--|---------------------------------------|
| Donard Car Park                          | 140                                   |
| Murlough National Nature Reserve         | 130                                   |
| Bloody Bridge                            | 105                                   |
| Tollymore Forest Park                    | 105                                   |
| Castlewellan Forest                      | 105                                   |
| Kilbrony Wood / Park                     | 105                                   |
| Silent Valley                            | 105                                   |
| Trassy Road / Meelmore Lodge***          | 70                                    |
| Leitrim Lodge                            | 70                                    |
| Carricklittle                            | 70                                    |
| Slieve Croob (weekend only)              | 35                                    |
| Cranfield                                | 70                                    |
| Warrenpoint town centre                  | 105                                   |
| Drumkerragh Forest (weekend only)        | 35                                    |
| <b>TOTAL</b>                             | <b>1,250</b>                          |

\*Three visits will be made – 1 full day and two half days.

\*\*Two visits will be made – as many interviews collected as possible however it will not be possible to guarantee target number of interviews

\*\*\*Trassey Road/Meelmore lodge interviews were carried out at the car park

## 2.3 BACKGROUND INFORMATION

Table 2.2 provides background information about the respondents taking part in the 2005 visitors' survey.

- In total 52% of respondents were male and 48% female.
- 9% of the respondents were in the age group 16-24, 34% were aged 25-39, 40% were aged 40-59 and 18% were aged over 60.
- 79% of respondents were from Northern Ireland, 8% were from England / Scotland / Wales and 6% from ROI.
- The ethnic background of the majority of respondents (99%) was white.
- 6% of the sample were in the ABC1 Socio Economic Group (SEG) and 47% were in the C2DE SEG. (See Appendix 2)
- In total 6% of respondents were visiting the area by themselves, 47% were with other adults and 47% had children in their group.

| <b>Table 2.2: Profile of Respondents –</b> |                                  |               |                 |
|--|----------------------------------|---------------|-----------------|
|  |                                  | <b>Number</b> | <b>Per cent</b> |
| Gender                                     | Male                             | 653           | 52              |
|  | Female                           | 594           | 48              |
| Age  | 16-24                            | 117           | 9               |
|  | 25-39                            | 425           | 34              |
|  | 40-59                            | 498           | 40              |
|  | 60+                              | 195           | 16              |
|  | Refused                          | 15            | 1               |
| Ethnic Background                          | White                            | 1236          | 99              |
|  | Indian                           | 1             | -               |
|  | Other Asian                      | 1             | -               |
|  | Black Caribbean                  | 1             | -               |
|  | Chinese                          | 1             | -               |
|  | Other                            | 10            | 1               |
| Country of origin                          | Northern Ireland                 | 988           | 79              |
|  | Republic of Ireland              | 80            | 6               |
|  | England / Scotland / Wales       | 103           | 8               |
|  | Other European country           | 25            | 2               |
|  | USA / Canada                     | 28            | 2               |
|  | Other*                           | 17            | 1               |
| SEG  | ABC1**                           | 733           | 59              |
|  | C2DE**                           | 453           | 36              |
|  | Refused / not enough info        | 64            | 5               |
| Composition of Group                       | Single adult                     | 80            | 6               |
|  | Two or more adults (no children) | 584           | 47              |
|  | Adults with children             | 586           | 47              |
| Base: All respondents (n=1250)             |                                  |               |                 |

\*Other includes: Australia, Malaysia, Lithuania, Israel, Isle of Man, New Zealand and South Africa.

\*\*Definition of occupations: Professional (A); Managerial / Technical (B); Skilled, non manual (C1); Skilled, manual (C2); Partly Skilled (D); Unskilled (E).



### 3.0 RESULTS – VISITORS SURVEY (2005)

This section outlines the results from the visitors' survey (2005).

### 3.1 DESCRIPTION OF VISIT TO THE MOURNES

#### 3.1.1 PURPOSE OF VISIT

Visitors were initially asked what was the main purpose of their visit to Mourne AONB. The majority (60%) stated that they were on a day trip to the area and 35% stated that they were on holiday, (see Table 3.1). Other reasons given include: to participate in a special recreational activity (3%) and for social purposes (2%).

| <b>Table 3.1: Purpose of visit to Mourne AONB</b> |               |                 |
|---|---------------|-----------------|
|   | <b>Number</b> | <b>Per cent</b> |
| Day trip  | 753           | 60              |
| On holiday  | 431           | 35              |
| Participate in a specific recreational activity   | 35            | 3               |
| Social – to meet friends / family                 | 23            | 2               |
| Shopping  | 5             | -               |
| Student   | 3             | -               |
| Base: All respondents (n=1250)                    |               |                 |

Significant differences occur across locations regarding the main purpose of visit (See Table 3.1.1). These are detailed below.

- Higher percentages of day trippers were surveyed at Carricklittle 79% and Slieve Croob 74% and both Drumkerragh Forest and Kilbrony Wood 72%.
- Locations that had low representation of day trippers were Meelmore Lodge 30% and Castlewellan 34%.
- High percentages of holiday makers were found at Castlewellan 66% and Meelmore Lodge 57%.
- Locations that had low representation of holiday makers were Donard 4%, Slieve Croob 14% and Warrenpoint 18%.

**Table 3.1.1: Purpose of Stay at Mourne AONB and Location**

|                        | Day trip (%) | Shopping (%) | Social – meet friends / relatives (%) | On holiday (%) | Student (%) | Participate in a specific recreational activity (%) | Total (%) |
|------------------------|--------------|--------------|---------------------------------------|----------------|-------------|---|-----------|
| Bloody Bridge          | 66           | 0            | 2                                     | 28             | 0           | 5   | 100       |
| Carricklittle          | 79           | 0            | 0                                     | 21             | 0           | 0   | 100       |
| Castlewellan Forest    | 34           | 0            | 0                                     | 66             | 0           | 0   | 100       |
| Cranfield              | 47           | 0            | 0                                     | 53             | 0           | 0   | 100       |
| Donard Car Park        | 69           | 1            | 4                                     | 21             | 0           | 6   | 100       |
| Drumkerragh Forest     | 71           | 0            | 0                                     | 20             | 0           | 9   | 100       |
| Kilbrony Wood / Forest | 72           | 0            | 0                                     | 25             | 1           | 2   | 100       |
| Leitrim Lodge          | 70           | 0            | 1                                     | 24             | 0           | 4   | 100       |
| Meelmore Lodge         | 30           | 0            | 1                                     | 57             | 0           | 11  | 100       |
| Murlough Bay           | 53           | 0            | 3                                     | 44             | 0           | 0   | 100       |
| Silent Valley          | 64           | 0            | 0                                     | 36             | 0           | 0   | 100       |
| Slieve Croob           | 74           | 0            | 3                                     | 14             | 0           | 9   | 100       |
| Tollymore Forest       | 57           | 0            | 0                                     | 41             | 1           | 1   | 100       |
| Warrenpoint            | 68           | 4            | 9                                     | 18             | 1           | 1   | 100       |

Base: All Respondents (n=1250)

### 3.1.2 LENGTH OF STAY

In total 26% of respondents stated that they would be staying in the area for up to half a day and 35% stated in would be for one day, (see Table 3.2). Overall 15% stated that they would be staying for up to a week and 10% stated that they would be staying in the area for more than a week.

**Table 3.2: Length of stay in Mourne AONB**

|                              | Number | Per cent |
|------------------------------|--------|----------|
| Half a day (up to six hours) | 325    | 26       |
| One day                      | 440    | 35       |
| Overnight                    | 50     | 4        |
| Weekend                      | 130    | 10       |
| Up to a week                 | 187    | 15       |
| Between 1-2 weeks            | 71     | 6        |
| More than this               | 44     | 4        |
| Don't know                   | 2      | -        |

Base: All respondents (n=1250)



Significant differences occur in length of stay in Mourne when each location is considered individually. These are detailed below.

- 54% surveyed at Drumkerragh Forest and 49% at Leitrim Lodge stated that they would be staying half a day.
- 60% surveyed at Bloody Bridge and 57% at Slieve Croob stated that they would be staying one day.

**Table 3.2.1: Length of stay in Mourne AONB and Location**

|                        | Half a day (%) | One day (%) | Overnight (%) | Weekend (%) | Up to a week (%) | Between 1-2 weeks (%) | More than this (%) | Don't know (%) | Total (%) |
|------------------------|----------------|-------------|---------------|-------------|------------------|-----------------------|--------------------|----------------|-----------|
| Bloody Bridge          | 11             | 66          | 4             | 4           | 14               | 4                     | 4                  | 0              | 100       |
| Carricklittle          | 40             | 39          | 1             | 6           | 7                | 6                     | 1                  | 0              | 100       |
| Castlewellan Forest    | 14             | 18          | 0             | 18          | 37               | 10                    | 3                  | 0              | 100       |
| Cranfield              | 19             | 29          | 4             | 10          | 20               | 9                     | 10                 | 0              | 100       |
| Donard Car Park        | 34             | 42          | 4             | 9           | 4                | 4                     | 3                  | 1              | 100       |
| Drumkerragh Forest     | 54             | 26          | 0             | 11          | 6                | 0                     | 3                  | 0              | 100       |
| Kilbrony Wood / Forest | 23             | 46          | 5             | 9           | 11               | 3                     | 5                  | 0              | 100       |
| Leitrim Lodge          | 49             | 11          | 9             | 19          | 7                | 6                     | 0                  | 0              | 100       |
| Meelmore Lodge         | 21             | 11          | 19            | 24          | 17               | 3                     | 1                  | 3              | 100       |
| Murlough Bay           | 29             | 25          | 4             | 6           | 18               | 10                    | 8                  | 0              | 100       |
| Silent Valley          | 34             | 30          | 2             | 9           | 17               | 7                     | 2                  | 0              | 100       |
| Slieve Croob           | 17             | 57          | 6             | 3           | 17               | 0                     | 0                  | 0              | 100       |
| Tollymore Forest       | 16             | 41          | 0             | 12          | 21               | 8                     | 2                  | 0              | 100       |
| Warrenpoint            | 21             | 50          | 4             | 9           | 9                | 5                     | 4                  | 0              | 100       |

Base: All Respondents (n=1250)

### 3.1.3 LENGTH OF TIME INTO STAY

Respondents were then asked to state how long into their stay they were, at the time of interview (see Table 3.3). In total 42% had just arrived, 19% were nearly half way through, 15% were half way through, 17% were nearly at the end of their stay and 7% were at the end of their stay.

**Table 3.3: Length of time into stay**

|                         | Number | Per cent |
|-------------------------|--------|----------|
| Just arrived            | 528    | 42       |
| Nearly half way through | 233    | 19       |
| Half way through stay   | 190    | 15       |
| Nearly at end of stay   | 212    | 17       |
| At the end of stay      | 87     | 7        |

Base: All respondents (n=1250)

## 3.2 TRANSPORT

### 3.2.1 METHOD OF TRANSPORT USED

As shown in Table 3.4, 64% of respondents drove a car / van to Mourne AONB that day and 31% were the passenger in a car. Other methods of transport used include walking, coach trip, motorcycle and bicycle.

| <b>Table 3.4: Method of Transport</b> |               |                 |
|---------------------------------------|---------------|-----------------|
|                                       | <b>Number</b> | <b>Per cent</b> |
| Car / van (driver)                    | 797           | 64              |
| Car / van (passenger)                 | 387           | 31              |
| Walk                                  | 18            | 1               |
| Coach Trip / Party                    | 7             | -               |
| Public Transport (bus)                | 20            | 2               |
| Motorcycle                            | 10            | -               |
| Bicycle                               | 9             | -               |
| Taxi                                  | 1             | -               |
| Other                                 | 1             | -               |
| Base: All respondents (n=1250)        |               |                 |

- 20 people who participated in the survey used public transport to travel to the location at which they were interviewed. The majority of these were interviewed at Warrenpoint (40%)
- Only one person travelled by taxi. This person was interviewed at Warrenpoint.

## 3.3 AREAS LIKELY TO VISIT DURING TRIP

Respondents were initially asked to state how many areas they would be likely to visit during their trip. As shown in Table 3.5 most respondents 44% stated that they would be visiting 2-3 areas during their trip, 31% stated they would be visiting one and 14% stated that they would be visiting 4-5 areas. Overall 11% stated they would be visiting six or more areas.

| <b>Table 3.5: Number of areas that will be visited during trip</b> |               |                 |
|--|---------------|-----------------|
|  | <b>Number</b> | <b>Per cent</b> |
| One  | 386           | 31              |
| 2-3  | 550           | 44              |
| 4-5  | 177           | 14              |
| 6-9  | 122           | 10              |
| 10+  | 15            | 1               |
| Base: All respondents (n=1250)                                     |               |                 |



Table 3.6 highlights that the most frequently visited area within Mourne AONB is Newcastle town (58%), 24% stated that they would be visiting Tollymore Forest and 24% stated Mourne Uplands. The areas visited during the trip will be related to the location where interviews were completed. Details of this are given in Table 2.1.

| <b>Table 3.6: Areas that will be visited during trip</b> |               |                  |
|--|---------------|------------------|
|  | <b>Number</b> | <b>Per cent*</b> |
| Newcastle Town   | 730           | 58               |
| Tollymore Forest   | 302           | 24               |
| Mourne Uplands   | 296           | 24               |
| Silent Valley  | 291           | 23               |
| Warrenpoint  | 273           | 22               |
| Kilkeel Coast  | 256           | 21               |
| Donard Park / Coast                                      | 248           | 20               |
| Castlewellan Forest                                      | 233           | 19               |
| Marlough Bay   | 210           | 17               |
| Bloody Bridge  | 175           | 14               |
| Kilbrony Wood / Park                                     | 163           | 13               |
| Cranfield  | 161           | 13               |
| Slieve Croob   | 59            | 5                |
| Other**  | 62            | 5                |
| Base: All respondents (n=1250)                           |               |                  |

\*Sum greater than 100% due to multiple responses.

\*\*Other includes: Annalong, Spelga Dam, Dundrum, Rostrevor.

### 3.4 ACTIVITIES UNDERTAKEN DURING TRIP

#### 3.4.1 ACTIVITIES UNDERTAKEN

A wide range of activities are available for visitors to Mourne AONB. Respondents in our survey were asked how many, if any, of a range of activities they would be participating in during their trip. Table 3.7 shows that 1% of respondents stated that they would not be participating in any activities during their trip, 31% stated they would be participating in one, 45% stated that they would be participating in 2-3 activities, 20% in 4-5 activities and 5% in 6-9 activities.

| <b>Table 3.7: Number of activities that will be undertaken during trip</b> |               |                 |
|--|---------------|-----------------|
|  | <b>Number</b> | <b>Per cent</b> |
| None   | 9             | 1               |
| One  | 373           | 31              |
| 2-3  | 561           | 45              |
| 4-5  | 248           | 20              |
| 6-9  | 57            | 5               |
| 10   | 2             | -               |
| Base: All respondents (n=1250)   |               |                 |



Those participants who stated that they would be taking part in an activity were asked to indicate which type. As shown in Table 3.8 the most common activities include: walking; visit towns / villages; visiting bars / restaurants; and visiting the beach / swimming.

| <b>Table 3.8: Activities undertaken during trip</b> |               |                  |
|---|---------------|------------------|
|   | <b>Number</b> | <b>Per cent*</b> |
| Walking   | 1020          | 82               |
| Visit towns / villages                              | 663           | 53               |
| Visit bar / restaurant                              | 577           | 46               |
| Visit beach / swimming                              | 435           | 35               |
| Visiting Ancient Monument                           | 133           | 11               |
| Cycling / mountain biking                           | 90            | 7                |
| Fishing   | 67            | 5                |
| Climbing  | 54            | 4                |
| Golf  | 41            | 3                |
| Horse riding  | 39            | 3                |
| Water sports  | 32            | 3                |
| Canoeing  | 22            | 2                |
| Orienteering  | 20            | 2                |
| Sailing   | 6             | -                |
| Motor sports  | 5             | -                |
| Other***  | 41            | 3                |
| Base: All respondents who (n=1250)                  |               |                  |

\*Sum greater than 100% due to multiple responses.

\*\*Other includes: football; picnic; camping; mountain running; sight seeing; music festival; painting.

**Table 3.8.1: Activities undertaken during trip and location**

|   | Base<br>(n) | Bloody<br>Bridge<br>(%) | Carricklittle<br>(%) | Castlewellan<br>Forest (%) | Cranfield<br>(%) | Donard<br>Car<br>Park<br>(%) | Drumkerragh<br>Forest (%) | Kilbrony<br>Wood /<br>Forest<br>(%) |
|---|-------------|-------------------------|----------------------|----------------------------|------------------|------------------------------|---------------------------|-------------------------------------|
| Walking<br>(other than<br>around the<br>town) | 1020        | 9                       | 7                    | 10                         | 4                | 10                           | 3                         | 10                                  |
| Visiting<br>Ancient<br>Monument               | 133         | 9                       | 5                    | 8                          | 11               | 3                            | 1                         | 8                                   |
| Visit beach /<br>swimming                     | 435         | 7                       | 2                    | 6                          | 15               | 9                            | 1                         | 4                                   |
| Visit towns /<br>villages                     | 663         | 9                       | 2                    | 6                          | 6                | 11                           | 2                         | 8                                   |
| Visit bar /<br>restaurant                     | 577         | 9                       | 2                    | 7                          | 7                | 9                            | 2                         | 6                                   |
| Cycling /<br>mountain<br>biking               | 90          | 6                       | 1                    | 22                         | 10               | 3                            | 4                         | 7                                   |
| Orienteering                                  | 20          | 0                       | 0                    | 0                          | 0                | 15                           | 0                         | 5                                   |
| Canoeing                                      | 22          | 0                       | 5                    | 60                         | 0                | 5                            | 0                         | 5                                   |
| Fishing                                       | 67          | 15                      | 2                    | 25                         | 10               | 2                            | 0                         | 2                                   |
| Motor<br>sports                               | 5           | 0                       | 0                    | 20                         | 0                | 40                           | 0                         | 0                                   |
| Water<br>sports                               | 32          | 9                       | 3                    | 22                         | 9                | 0                            | 0                         | 3                                   |
| Golf  | 41          | 7                       | 0                    | 12                         | 7                | 0                            | 2                         | 10                                  |
| Sailing                                       | 6           | 0                       | 0                    | 0                          | 17               | 17                           | 0                         | 0                                   |
| Climbing                                      | 54          | 20                      | 9                    | 0                          | 2                | 33                           | 2                         | 4                                   |
| Horse riding                                  | 39          | 5                       | 0                    | 26                         | 0                | 5                            | 8                         | 10                                  |
| Other   | 40          | 20                      | 3                    | 3                          | 0                | 10                           | 15                        | 13                                  |
| Base: All Respondents (n=1250)                |             |                         |                      |                            |                  |                              |                           |                                     |

**Table 3.8.1 (Contd): Activities undertaken during trip and location**

|   | Base<br>(n) | Leitrim<br>Lodge<br>(%) | Meelmore<br>Lodge (%) | Murlough<br>Bay (%) | Silent<br>Valley<br>(%) | Slieve<br>Croob<br>(%) | Tollymore<br>Forest (%) | Warrenpoint<br>(%) |
|---|-------------|-------------------------|-----------------------|---------------------|-------------------------|------------------------|-------------------------|--------------------|
| Walking<br>(other than<br>around the<br>town) | 1020        | 6                       | 6                     | 9                   | 10                      | 3                      | 10                      | 5                  |
| Visiting<br>Ancient<br>Monument               | 133         | 2                       | 11                    | 4                   | 15                      | 4                      | 11                      | 11                 |
| Visit beach /<br>swimming                     | 435         | 3                       | 4                     | 24                  | 5                       | 1                      | 8                       | 10                 |
| Visit towns /<br>villages                     | 663         | 4                       | 7                     | 16                  | 8                       | 2                      | 7                       | 13                 |
| Visit bar /<br>restaurant                     | 577         | 9                       | 5                     | 14                  | 9                       | 3                      | 6                       | 14                 |
| Cycling /<br>mountain<br>biking               | 90          | 8                       | 3                     | 12                  | 4                       | 0                      | 16                      | 3                  |
| Orienteering                                  | 20          | 50                      | 10                    | 0                   | 5                       | 5                      | 0                       | 10                 |
| Canoeing                                      | 22          | 0                       | 0                     | 5                   | 9                       | 5                      | 0                       | 9                  |
| Fishing                                       | 67          | 2                       | 3                     | 15                  | 5                       | 2                      | 10                      | 9                  |
| Motor sports                                  | 5           | 0                       | 0                     | 20                  | 0                       | 0                      | 0                       | 20                 |
| Water sports                                  | 32          | 3                       | 3                     | 13                  | 9                       | 6                      | 6                       | 13                 |
| Golf  | 41          | 20                      | 2                     | 7                   | 7                       | 15                     | 5                       | 5                  |
| Sailing                                       | 6           | 17                      | 0                     | 17                  | 0                       | 17                     | 0                       | 17                 |
| Climbing                                      | 54          | 2                       | 7                     | 7                   | 2                       | 4                      | 4                       | 4                  |
| Horse riding                                  | 39          | 0                       | 5                     | 18                  | 3                       | 8                      | 5                       | 8                  |
| Other   | 40          | 0                       | 5                     | 23                  | 0                       | 3                      | 5                       | 3                  |

Base: All Respondents (n=1250)



### 3.4.2 KNOWLEDGE OF HOW TO ACCESS ACTIVITIES MOURNE AONB

All respondents were asked to consider the activities that were outlined in the previous question and state if they would be aware of how to access these activities in Mourne AONB. As shown in Table 3.9, 43% of respondents stated that they would know how to access all activities, 27% stated they would be able to access the majority, 15% said 'some of them', 11% 'not very many' and 4% 'none at all'.

| <b>Table 3.9: How many activities respondents would know how to access in Mourne AONB</b> |               |                 |
|---|---------------|-----------------|
|   | <b>Number</b> | <b>Per cent</b> |
| All of them   | 543           | 43              |
| Most of them / majority   | 333           | 27              |
| Some of them  | 183           | 15              |
| Not very many   | 136           | 11              |
| None at all   | 50            | 4               |
| Don't know  | 5             | -               |
| Base: All respondents (n=1250)  |               |                 |

### 3.4.3 ADDITIONAL ACTIVITIES / FACILITIES THAT SHOULD BE AVAILABLE IN MOURNE AONB

In total 39% of respondents (n=489) thought that there should be additional facilities in the area, 49% (n=610) did not think that there needed to be additional facilities provided in the area and 12% did not know. Those who stated that there should be more facilities (n=489) were asked what these might be and as shown in Table 3.10 suggestions included: improved toilet facilities; more coffee shops, restaurants and pubs; indoor leisure facilities; and children's parks and playgrounds.

| <b>Table 3.10: Suggestions for Additional Facilities in the area</b> |               |                  |
|--|---------------|------------------|
|  | <b>Number</b> | <b>Per cent*</b> |
| More children's activities   | 84            | 17               |
| Better toilet / shower facilities                                    | 77            | 16               |
| Better signage to the beach and walks/car parks                      | 36            | 7                |
| Indoor pool  | 35            | 7                |
| More seating/picnic tables   | 35            | 7                |
| More bars / restaurants / cafes in caravan parks                     | 32            | 6                |
| Improved refuse collection/more bins                                 | 27            | 6                |
| More camping facilities  | 22            | 4                |
| Better / more secure parking   | 17            | 3                |
| More shops open longer   | 16            | 3                |
| Quality tea / coffee shop  | 12            | 2                |
| More disabled facilities / toilets                                   | 8             | 2                |
| Ski lift in Mountains  | 6             | 1                |
| Night clubs / discos / music   | 6             | 1                |
| Fresh water taps   | 6             | 1                |
| Other**  | 70            | 14               |

Base: Respondents who stated what additional facilities there should be in the Mournes area (n=489)

\*Sum greater than 100% due to multiple responses.

\*\*Other includes:



### 3.5 ESTIMATED SPEND

Respondents were asked to provide information regarding their estimated spend in Mourne AONB area during their visit. This was to include entrance fees, food and drink, accommodation, shopping, hire / purchase equipment and activity charges. As shown in Table 3.11 the most of participants (38%) stated that they would be spending up to £30 in the area. However 10% stated that they would not be spending anything.

| <b>Table 3.11: Estimated Spend in Area</b> |               |                 |
|--|---------------|-----------------|
|  | <b>Number</b> | <b>Per cent</b> |
| Nothing                                    | 126           | 10              |
| Up to £30                                  | 479           | 38              |
| £31-£50                                    | 190           | 15              |
| £51-£100                                   | 135           | 11              |
| £101-£500                                  | 218           | 17              |
| £501-£1,000                                | 51            | 4               |
| More than £1,000                           | 14            | 1               |
| Don't know                                 | 31            | 2               |
| Other                                      | 2             | -               |
| Base: All respondents (n=1250)             |               |                 |



Statistically significant differences occur in spend patterns at each location. These are detailed below.

- 41% of visitors surveyed at Castlewella Forest 39% at Cranfield, 38% at Murlough Bay and 31% at Tollymore Forest stated that they would be spending over £100.

**Table 3.11.1: Estimated Spend in Area by Location**

|                        | Nothing (%) | Up to £30 (%) | £31-£50 (%) | £51-£100 (%) | £101-£500 (%) | £501-£1000 (%) | More than £1000 (%) | Don't know (%) | Total (%) |
|------------------------|-------------|---------------|-------------|--------------|---------------|----------------|---------------------|----------------|-----------|
| Bloody Bridge          | 11          | 51            | 14          | 4            | 17            | 3              | 0                   | 1              | 100       |
| Carricklittle          | 31          | 44            | 10          | 7            | 6             | 1              | 0                   | 0              | 100       |
| Castlewella Forest     | 9           | 23            | 7           | 17           | 37            | 2              | 2                   | 4              | 100       |
| Cranfield              | 4           | 33            | 6           | 16           | 28            | 10             | 1                   | 3              | 100       |
| Donard Car Park        | 22          | 38            | 15          | 9            | 10            | 1              | 2                   | 4              | 100       |
| Drumkerragh Forest     | 20          | 46            | 9           | 3            | 17            | 0              | 0                   | 6              | 100       |
| Kilbrony Wood / Forest | 4           | 58            | 10          | 12           | 11            | 5              | 0                   | 1              | 100       |
| Leitrim Lodge          | 26          | 24            | 21          | 7            | 11            | 1              | 0                   | 9              | 100       |
| Meelmore Lodge         | 3           | 26            | 31          | 11           | 19            | 3              | 0                   | 7              | 100       |
| Murlough Bay           | 2           | 29            | 20          | 10           | 23            | 12             | 3                   | 2              | 100       |
| Silent Valley          | 7           | 45            | 28          | 8            | 11            | 1              | 1                   | 0              | 100       |
| Slieve Croob           | 20          | 29            | 17          | 11           | 17            | 6              | 0                   | 0              | 100       |
| Tollymore Forest       | 5           | 38            | 10          | 16           | 24            | 6              | 1                   | 2              | 100       |
| Warrenpoint            | 2           | 48            | 14          | 15           | 12            | 5              | 2                   | 2              | 100       |

Base: All Respondents (n=1250)



The following table highlights where respondents who stated they would spend 'nothing' were interviewed. It can be seen that 24% of those interviewed at Donard Car Park stated they would be spending nothing, 17% interviewed at Carricklittle and 14% interviewed at Leitrim Lodge, (see Table 3.12).

**Table 3.12: Estimated Spend in Area by Location**

|                        | Nothing (%) | Up to £30 (%) | £31-£50 (%) | £51-£100 (%) | £101-£500 (%) | £501-£1000 (%) | More than £1000 (%) | Don't know (%) |
|------------------------|-------------|---------------|-------------|--------------|---------------|----------------|---------------------|----------------|
| Bloody Bridge          | 9           | 11            | 8           | 3            | 8             | 6              | 0                   | 3              |
| Carricklittle          | 17          | 7             | 4           | 4            | 2             | 2              | 0                   | 0              |
| Castlewellan Forest    | 7           | 5             | 4           | 13           | 18            | 4              | 14                  | 12             |
| Cranfield              | 2           | 5             | 2           | 8            | 9             | 14             | 7                   | 6              |
| Donard Car Park        | 24          | 11            | 11          | 9            | 6             | 2              | 21                  | 15             |
| Drumkerragh Forest     | 5           | 3             | 2           | 1            | 3             | 0              | 0                   | 6              |
| Kilbrony Wood / Forest | 3           | 13            | 5           | 10           | 5             | 10             | 0                   | 3              |
| Leitrim Lodge          | 14          | 4             | 8           | 4            | 4             | 2              | 0                   | 18             |
| Meelmore Lodge         | 2           | 4             | 12          | 6            | 6             | 4              | 0                   | 15             |
| Murlough Bay           | 2           | 8             | 8           | 10           | 14            | 29             | 29                  | 9              |
| Silent Valley          | 5           | 10            | 10          | 6            | 6             | 2              | 7                   | 0              |
| Slieve Croob           | 5           | 2             | 2           | 3            | 3             | 4              | 0                   | 0              |
| Tollymore Forest       | 4           | 8             | 5           | 13           | 12            | 12             | 7                   | 6              |
| Warrenpoint            | 2           | 10            | 8           | 12           | 6             | 10             | 14                  | 6              |
| Total                  | 100         | 100           | 100         | 100          | 100           | 100            | 100                 | 100            |
| Base                   | 130         | 479           | 190         | 135          | 218           | 51             | 14                  | 33             |

Base: All Respondents (n=1250)

### 3.6 SATISFACTION WITH VARIOUS ASPECTS OF MOURNE AONB

Respondents were then asked to state how satisfied they are with various aspects of Mourne AONB. As shown in Table 3.13 all respondents (100%) were either ‘very satisfied’ or ‘quite satisfied’ with the scenery in the area, 92% were satisfied with car parking and 90% were satisfied with the condition of the natural environment. Overall 90% were satisfied they were getting value for money and 84% were satisfied with public access to the countryside. Satisfaction was lowest with the provision of tourist information (54% satisfied) and with toilets facilities in the area (60%).

|                                  | Very Satisfied (%) | Quite Satisfied (%) | Neither (%) | Quite Dissatisfied (%) | Very dissatisfied (%) | Don't know (%) | N/A (%) |
|----------------------------------|--------------------|---------------------|-------------|------------------------|-----------------------|----------------|---------|
| Scenery                          | 96                 | 4                   | -           | -                      | -                     | -              | -       |
| Car parking                      | 70                 | 22                  | 3           | 3                      | 1                     | 1              | 1       |
| Value for money                  | 65                 | 25                  | 4           | 1                      | 1                     | 4              | -       |
| Value for money                  | 63                 | 30                  | 3           | 1                      | 1                     | 2              | -       |
| Condition of natural environment | 68                 | 22                  | 2           | 3                      | -                     | 4              | -       |
| Public Access to the countryside | 65                 | 19                  | 2           | 1                      | -                     | 13             | -       |
| Safety                           | 56                 | 24                  | 5           | 1                      | -                     | 14             | -       |
| Shops / Services                 | 44                 | 28                  | 8           | 4                      | 1                     | 9              | 6       |
| Signage                          | 47                 | 24                  | 6           | 5                      | 1                     | 15             | 1       |
| Trails                           | 47                 | 19                  | 3           | 1                      | -                     | 30             | 2       |
| Toilets                          | 37                 | 23                  | 6           | 10                     | 6                     | 12             | 6       |
| Provision of Tourist information | 39                 | 15                  | 6           | 3                      | 1                     | 32             | 5       |

Base: All respondents (n=1250)



Statistically significant differences occur with satisfaction ratings with toilet facilities and the provision of tourist information when each location is considered individually. This is detailed below.

- 90% of visitors survey at Leitrim Lodge, 77% at Kilbrony Wood and 73% at the Silent Valley stated that they were either quite or very satisfied with the provision of tourist information at these locations.
- Satisfaction with this facility was significantly lower amongst respondents at Tollymore Forest 21%, and Drumkerragh Forest 29%.
- 86% of respondents at Castlewellaan and 82% at Tollymore Forest and 81% at Kilbrony Lodge stated that they were either quite or very satisfied with the toilet facilities.
- Locations with considerably lower satisfaction ratings with toilet facilities were Carricklittle 4% and Drumkerragh Forest 6% and Slieve Croob 20%.

### 3.7 LIKELIHOOD OF RETURNING TO MOURNES AONB

In total 63% of respondents stated that they would definitely return to Mourne AONB during the next 12 months (see Table 3.14). As well as this, 26% stated that they would be 'quite likely' or 'very likely' to return to the area in the next 12 months. Overall 8% of respondents stated that they would be unlikely or would not be returning in the next 12 months and 4% did not know.

|                                | <b>Number</b> | <b>Per cent</b> |
|--------------------------------|---------------|-----------------|
| Will definitely be back        | 789           | 63              |
| Very likely to return          | 236           | 19              |
| Quite likely to return         | 86            | 7               |
| Quite unlikely to return       | 22            | 2               |
| Very unlikely to return        | 33            | 3               |
| Will not be back               | 40            | 3               |
| Don't know                     | 44            | 4               |
| Base: All respondents (n=1250) |               |                 |

The results from the likelihood of returning section have been cross tabulated with location, spend patterns and activities. This is detailed below.

- 87% of visitors surveyed at Carricklittle and 79% at Castlewellaan stated that they would definitely return.
- 10% of those interviewed at Leitrim Lodge stated that they would definitely not be back.
- 57% of those surveyed that spent over £100 stated that they would definitely be back to the Mournes.
- As table 3.14 shows only 3% of respondents said they would not return to the Mournes AONB. When likelihood of returning was cross tabbed with specific activities sailing showed a significant difference to the average with 17% stating that they would not be back. Fifteen per cent of those that participated in orienteering stated that they would not be back.

Those respondents who stated that they would be unlikely to return to the area (n=95) were asked the reason for this. As shown in Table 3.15 the main reason given (54%) was that respondents would not be in Northern Ireland in the next 12 months.

| <b>Table 3.15: Reason for not returning to Mourne AONB within the next 12 months</b> |               |                 |
|--|---------------|-----------------|
|  | <b>Number</b> | <b>Per cent</b> |
| Will not be in Northern Ireland within the next 12 months                            | 51            | 54              |
| Variety / like to visit other areas  | 23            | 24              |
| Seen everything I want to in the area  | 12            | 13              |
| Not enough / suitable activities   | 3             | 3               |
| Too expensive  | 2             | 2               |
| Poor facilities at visitor attractions   | 2             | 2               |
| Poor condition of natural environment  | 2             | 2               |
| Too crowded  | 1             | 1               |
| Poor accommodation   | 1             | 1               |
| Other  | 2             | 2               |
| Base: Respondents who stated that they would not be in Mournes area again (n=95)     |               |                 |

### 3.8 ACTIVITIES THAT WILL BE PARTICIPATED IN DURING NEXT VISIT

Those respondents who stated that they would be in the area again (n=1111) were asked to state what activities they would be likely to participate during that visit. As shown in Table 3.16 the main activities that would be undertaken include: walking 87%; visit towns / villages 63%; visit bar / restaurant 56%.

| <b>Table 3.16: Activities that will be participated in during next visit?</b>              |               |                  |
|--|---------------|------------------|
|  | <b>Number</b> | <b>Per cent*</b> |
| Walking (other than around the town)   | 966           | 87               |
| Visit town / villages  | 695           | 63               |
| Visit bar / restaurant   | 626           | 56               |
| Visit beach / swimming   | 516           | 46               |
| Visiting Ancient Monument  | 150           | 14               |
| Cycling  | 138           | 12               |
| Fishing  | 94            | 8                |
| Climbing   | 70            | 6                |
| Water sports   | 64            | 6                |
| Horse riding   | 64            | 6                |
| Golf   | 61            | 5                |
| Canoeing   | 40            | 4                |
| Orienteering   | 31            | 3                |
| Sailing  | 11            | 1                |
| Motor Sports   | 8             | -                |
| Other  | 35            | 3                |
| Base: Respondents who stated that they would be Mourne AONB within next 12 months (n=1111) |               |                  |

\*Sum greater than 100% due to multiple responses.

\*\*Other includes: motorcycling; shopping; jogging; pitch and putt; picnic; ballroom dancing; amusements; fitness training; absailing; bird watching.

### 3.9 SOURCES OF TOURIST INFORMATION

Respondents were asked where they got the information about the areas they were visiting that day. From Table 3.17 it can be seen that just over three quarters of respondents stated that they knew about the area because they had been before and for 28% of respondents they got information through 'word of mouth'.

| <b>Table 3.17: Where respondents got information about the area</b> |               |                  |
|---|---------------|------------------|
|   | <b>Number</b> | <b>Per cent*</b> |
| Been here before  | 958           | 77               |
| Word of mouth   | 347           | 28               |
| TIC   | 77            | 6                |
| Live close by   | 71            | 6                |
| Internet  | 38            | 3                |
| Brochure  | 35            | 3                |
| Travel Agent  | 8             | 1                |
| Advert in paper   | 6             | 1                |
| Other**   | 48            | 4                |
| Base: All respondents (n=1250)                                      |               |                  |

\*Sum greater than 100 due to multiple responses.

\*\*Other includes: friends and family, books, work training, library, yellow pages, found it by chance, other campsites, TV, youth workers,

### 3.10 OVERALL SATISFACTION WITH MOURNE AONB

Overall satisfaction with the area was high with 96% of respondents stating that they were either 'very satisfied' or 'quite satisfied' with the area. In total only 2% stated that they were 'quite dissatisfied' and 1% stated that they were 'neither satisfied nor dissatisfied,' (Table 3.18).

| <b>Table 3.18: Overall Satisfaction</b> |               |                 |
|---|---------------|-----------------|
|   | <b>Number</b> | <b>Per cent</b> |
| Very satisfied                          | 999           | 80              |
| Quite satisfied                         | 197           | 16              |
| Neither satisfied nor dissatisfied      | 16            | 1               |
| Quite dissatisfied                      | 22            | 2               |
| Very dissatisfied                       | 3             | -               |
| Don't know                              | 13            | 1               |
| Base: All respondents (n=1250)          |               |                 |

### 3.10.1 REASONS WHY PARTICIPANTS ARE SATISFIED

Respondents were asked to give reasons why they stated that they were satisfied with Mourne AONB. As shown in Table 3.19 the majority 68%, stated that it was because of the natural beauty in the area. Other reasons given include the relaxed atmosphere 13% and that it is good for the children 7%.

| <b>Table 3.19: Reasons given for satisfaction</b>                                    |               |                  |
|--|---------------|------------------|
|  | <b>Number</b> | <b>Per cent*</b> |
| Natural beauty in area   | 855           | 72               |
| Relaxed atmosphere   | 159           | 13               |
| Good for children / plenty to see and do   | 91            | 8                |
| Good access / convenient to home   | 24            | 2                |
| Good for (inexperienced walkers)   | 18            | 2                |
| Well maintained paths / clean area   | 9             | 1                |
| Like to holiday locally / familiar places  | 5             | -                |
| Good Value for Money   | 3             | -                |
| Good shopping  | 2             | -                |
| Other**  | 6             | 1                |
| Base: Respondents who gave reasons why they are satisfied with Mournes area (n=1196) |               |                  |

Sum greater than 100 due to multiple responses.

\*\*Other includes:

### 3.10.2 REASONS WHY PARTICIPANTS ARE DISSATISFIED

Respondents were asked to give reasons why they stated that they were dissatisfied with Mourne AONB. In total 25 did and reasons for dissatisfaction included poor toilets, dog fouling, poor signage / tourist info, not enough for children, needs secure car parking and poor car parking.

### 3.11 PERCEPTION OF CROWDING

Finally respondents were asked to comment on their perception of crowding at the areas they had visited in the Mournes. In total 60% stated that they did not think that the area was over crowded at all, 31% stated that it was 'not really over crowded', 5% stated that it was 'a little over crowded' and 1% stated that it was 'very over crowded', (see Table 3.20).

| <b>Table 3.20: Perception of crowding</b> |               |                 |
|---|---------------|-----------------|
|   | <b>Number</b> | <b>Per cent</b> |
| Very over crowded                         | 12            | 1               |
| A little over crowded                     | 35            | 3               |
| Not really over crowded                   | 175           | 14              |
| Not at all over crowded                   | 1002          | 80              |
| Don't know                                | 26            | 2               |
| Base: All respondents (n=1250)            |               |                 |



## 4.0 SUMMARY

The key results from the 2005 survey of visitors to Mourne AONB are summarised below. The majority of respondents (60%) were on a day trip to the Mourne and 35% stated that they were on holiday, (see Table 3.1). In total 26% stated that they would be staying in the area for up to half a day and 35% would in the area for a day, (see Table 3.2).

The vast majority of respondents (95%) had travelled to Mourne AONB by car – either as a passenger or driver, (see Table 3.4).

31% stated that they would be visiting one location within Mourne AONB on this trip and stated that they would be visiting 2-3 locations, (see Table 3.5). The most commonly mentioned locations were Newcastle town, Tollymore Forest and Mourne Uplands. (see Table 3.6).

The most commonly mentioned activities that respondents stated they would be participating in are: walking; visit towns / villages and visit beach / swimming (see Table 3.8). Just under half of all respondents (43%) stated that they would be aware of how to access all activities in the area and 27% stated that they would know how to access 'most of them', (see Table 3.9).

Respondents were asked what additional facilities they would like to see in Mourne AONB. The most frequently mentioned were: more children's activities, better toilet / shower facilities; better signage to the beach and walks / car parks and an indoor pool (see Table 3.10).

The estimated spend in the area was relatively low with 10% of respondents stating that they would be spending nothing. A further 38% stated that they would be spending 'up to £30' and 15% stated that they would be spending '£30-£50', (see Table 3.11).

Satisfaction with a range of aspects of Mourne AONB was very high. In total 100% stated that they were satisfied with the scenery, 92% were satisfied with car parking, 90% thought they had got value for money, and 90% were satisfied with the condition of natural environment. Areas of least satisfaction were the provision of tourist information (54% satisfied) and toilets (60% satisfied). See Table 3.13 for full details.

In total 63% of respondents stated that they would 'definitely be back' to Mourne AONB within the next 12 months and 19% stated that they would be 'very likely to return', (see Table 3.14). The majority (54%) of those who stated that they would not be back to the area (n=95) said that this was because they would not be in Northern Ireland again within the next 12 months, (see Table 3.15).

77% of respondents knew about the area because they had been before and 28% had got information through word of mouth, (see Table 3.17).

Overall satisfaction of the visitors to Mourne AONB was high with 80% stating they were 'very satisfied' and 16% stating that they were 'quite satisfied', (see Table



3.18). The main reason given for satisfaction with the area was the natural beauty in the area, (see Table 3.19).

Finally respondents were asked to comment on their perception of crowding. In total 80% of respondents stated that the area was 'not over crowded at all' and a further 14% stated that it was 'not really over crowded', (see Table 3.20).

|           |  |
|-----------|--|
| <b>1</b>  | The majority of respondents (60%) were on a day trip to the Mourne and 35% stated that they were on holiday.   |
| <b>2</b>  | In total 26% stated that they would be staying in the area for up to half a day and 35% would in the area for a day.   |
| <b>3</b>  | The vast majority of respondents (95%) had travelled to Mourne AONB by car – either as a passenger or driver.  |
| <b>4</b>  | 31% stated that they would be visiting one location within Mourne AONB on this trip and stated that they would be visiting 2-3 locations.  |
| <b>5</b>  | The most commonly mentioned locations were Newcastle town, Tollymore Forest and Mourne Uplands.  |
| <b>6</b>  | The most commonly mentioned activities that respondents stated they would be participating in are: walking; visit towns / villages and visit beach / swimming.   |
| <b>7</b>  | Just under half of all respondents (43%) stated that they would be aware of how to access all activities in the area and 27% stated that they would know how to access 'most of them'.   |
| <b>8</b>  | Respondents were asked what additional facilities they would like to see in Mourne AONB. The most frequently mentioned were: more children's activities, better toilet / shower facilities; better signage to the beach and walks / car parks and an indoor pool.  |
| <b>9</b>  | The estimated spend in the area was relatively low with 10% of respondents stating that they would be spending nothing. A further 38% stated that they would be spending 'up to £30' and 15% stated that they would be spending '£30-£50'.   |
| <b>10</b> | Satisfaction with a range of aspects of Mourne AONB was very high. In total 100% stated that they were satisfied with the scenery, 92% were satisfied with car parking, 90% thought they had got value for money, and 90% were satisfied with the condition of natural environment. Areas of least satisfaction were the provision of tourist information (54% satisfied) and toilets (60% satisfied). |
| <b>11</b> | In total 63% of respondents stated that they would 'definitely be back' to Mourne AONB within the next 12 months and 19% stated that they would be 'very likely to return'.  |
| <b>12</b> | The majority (54%) of those who stated that they would not be back to the area (n=95) said that this was because they would not be in Northern Ireland again within the next 12 months.  |
| <b>13</b> | 77% of respondents knew about the area because they had been before and 28% had got information through word of mouth.   |
| <b>14</b> | Overall satisfaction of the visitors to Mourne AONB was high with 80% stating they were 'very satisfied' and 16% stating that they were 'quite satisfied'.   |
| <b>15</b> | The main reason given for satisfaction with the area was the natural beauty in the area.   |
| <b>16</b> | Finally respondents were asked to comment on their perception of crowding. In total 80% of respondents stated that the area was 'not over crowded at all' and a further 14% stated that it was 'not really over crowded'.  |



## APPENDIX 1

# QUESTIONNAIRE



## MOURNES HERITAGE TRUST

### VISITORS SURVEY 2005

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Hello, my name is ( ) from Research and Evaluation Services. We have been commissioned by the Mourne Heritage Trust to do some research with visitors to the Mourne Area of Outstanding Natural Beauty. The survey will ask about your visit to the Mourne today and your views on the facilities.

It should take no longer than 5-10 minutes to complete.

- a. Can I firstly ask, do you live in the Mourne area of outstanding natural beauty?  
(SHOW MAP)

|            |                                  |
|------------|----------------------------------|
| Yes        | <b>Thank and close interview</b> |
| No         | Go to b                          |
| Don't know | <b>Thank and close interview</b> |

- b. Are you here today on work-related business?

|     |                                  |
|-----|----------------------------------|
| Yes | <b>Thank and close interview</b> |
| No  | Go to c                          |

- c. Are you aged 16+?

|     |                                  |
|-----|----------------------------------|
| Yes | Go to Q1                         |
| No  | <b>Thank and close interview</b> |

---

| LOCATION – INTERVIEWER CIRCLE ONE ONLY |          |                  |           |
|--|----------|------------------|-----------|
| Bloody Bridge                          | <b>1</b> | Leitrim Lodge    | <b>8</b>  |
| Carricklittle                          | <b>2</b> | Meelmore Lodge   | <b>9</b>  |
| Castlewellan Forest                    | <b>3</b> | Murlough Bay     | <b>10</b> |
| Cranfield                              | <b>4</b> | Silent Valley    | <b>11</b> |
| Donard Car Park                        | <b>5</b> | Slieve Croob     | <b>12</b> |
| Drumkerragh Forest                     | <b>6</b> | Tollymore Forest | <b>13</b> |
| Kilbrony Wood / Forest                 | <b>7</b> | Warrenpoint      | <b>14</b> |

| INTERVIEWER NAME | INTERVIEWER NUMBER |  |  |
|------------------|--------------------|--|--|
|                  |                    |  |  |



1. Could you now tell me what is your country of origin?  
**CODE ONE ONLY**

| <b>Country of Origin</b>     |   |
|------------------------------|---|
| Northern Ireland             | 1 |
| Republic of Ireland          | 2 |
| England / Scotland / Wales   | 3 |
| Other European Country       | 4 |
| USA / Canada                 | 5 |
| Other (please specify below) | 6 |
|                              |   |

2. What is the composition of the group with you today?

| <b>NUMBER OF ADULTS</b> | <b>NUMBER OF CHILDREN (under 16)</b> | <b>TOTAL</b> |
|-------------------------|--------------------------------------|--------------|

3. By what means did you travel to the Mourne area today?  
**CODE ONE ONLY**

| <b>Method of Transport Used</b> |   |
|---------------------------------|---|
| Walk                            | 1 |
| Car / van (driver)              | 2 |
| Car / van (passenger)           | 3 |
| Taxi                            | 4 |
| Motorcycle                      | 5 |
| Public Transport (Bus)          | 6 |
| Coach Trip / Party              | 7 |
| Bicycle                         | 8 |
| Other (please specify below)    | 9 |
|                                 |   |



4. Could you tell me what is the **MAIN** purpose of your visit to \_\_\_\_\_ today?  
**CODE ONE ONLY**

| <b>Purpose of Visit</b>                         |   |
|---|---|
| Day trip  | 1 |
| Shopping  | 2 |
| Social – to meet friends / relatives            | 3 |
| On holiday                                      | 4 |
| Student   | 5 |
| Participate in a specific recreational activity | 6 |
| Other (please specify below)                    | 7 |
|   |   |

5. How long are you staying in the Mournes area during this visit?  
**CODE ONE ONLY**

| <b>Length of stay</b>        |   |
|------------------------------|---|
| Half a day (up to 6 hours)   | 1 |
| One day                      | 2 |
| Overnight                    | 3 |
| Weekend                      | 4 |
| Up to a week                 | 5 |
| Between 1-2 weeks            | 6 |
| More than this               | 7 |
| Don't know                   | 8 |
| Other (please specify below) | 9 |
|                              |   |

6. How long into your visit to the Mournes area are you?  
**CODE ONE ONLY**

| <b>Length of stay</b>        |   |
|------------------------------|---|
| Just arrived                 | 1 |
| Nearly half way through      | 2 |
| Half way                     | 3 |
| Nearly at the end            | 4 |
| At the end                   | 5 |
| Other (please specify below) | 6 |



7. What areas within the Mournes are you likely to visit during this trip?  
**DO NOT PROMPT – CODE ALL THAT APPLY**

| <b>Area Visited</b>             |     |    |
|---------------------------------|-----|----|
|                                 | Yes | No |
| Newcastle Town                  | 1   | 2  |
| Donard Park / Wood              | 1   | 2  |
| Murlough Bay                    | 1   | 2  |
| Bloody Bridge                   | 1   | 2  |
| Tollymore Forest                | 1   | 2  |
| Castlewellan Forest             | 1   | 2  |
| Kilbrony Wood / Park            | 1   | 2  |
| Silent Valley                   | 1   | 2  |
| Kilkeel Coast                   | 1   | 2  |
| Mourne Uplands (mountain areas) | 1   | 2  |
| Slieve Croob                    | 1   | 2  |
| Cranfield                       | 1   | 2  |
| Warrenpoint                     | 1   | 2  |
| Other (please specify below)    | 1   | 2  |
|                                 |     |    |

8. Could you tell me which of the following activities you will be undertaking during your visit to the Mournes?

**READ OUT – CODE ALL THAT APPLY**

| <b>Activities Undertaken</b>         |     |    |
|--------------------------------------|-----|----|
|                                      | Yes | No |
| Walking (other than around the town) | 1   | 2  |
| Visiting Ancient Monument            | 1   | 2  |
| Visit beach / swimming               | 1   | 2  |
| Visit towns / villages               | 1   | 2  |
| Visit bar / restaurant               | 1   | 2  |
| Cycling / mountain biking            | 1   | 2  |
| Orienteering                         | 1   | 2  |
| Canoeing                             | 1   | 2  |
| Fishing                              | 1   | 2  |
| Motor sports                         | 1   | 2  |
| Water sports                         | 1   | 2  |
| Golf                                 | 1   | 2  |
| Sailing                              | 1   | 2  |
| Climbing                             | 1   | 2  |
| Horse riding                         | 1   | 2  |
| Other (please specify below)         | 1   | 2  |
|                                      |     |    |



9. With regard to the activities discussed in the previous question, how many of these would you know how to access in the Mourne area?

**CODE ONE ONLY**

|                         |   |
|-------------------------|---|
| All of them             | 1 |
| Most of them / majority | 2 |
| Some of them            | 3 |
| Not very many           | 4 |
| None at all             | 5 |

10. Are there any additional facilities / activities that you think should be available in this area? **CODE ONE ONLY**

|            |   |           |
|------------|---|-----------|
| Yes        | 1 | Go to Q11 |
| No         | 2 | Go to Q12 |
| Don't know | 3 |           |

11. If yes what would these be?

**INTERVIEWER PLEASE RECORD**

12. Where did you get information about the area / facility you are visiting today?

**DO NOT PROMPT – CODE ALL THAT APPLY**

| <b>Facilities</b>            |     |    |
|------------------------------|-----|----|
|                              | Yes | No |
| Word of mouth                | 1   | 2  |
| Been here before             | 1   | 2  |
| Live close by                | 1   | 2  |
| Brochure                     | 1   | 2  |
| Tourist Information Centre   | 1   | 2  |
| Travel Agent                 | 1   | 2  |
| Internet                     | 1   | 2  |
| Advert in paper / magazine   | 1   | 2  |
| Other (please specify below) | 1   | 2  |



13. Can you tell me approximately how much money will you be spending in the Mournes area during your visit (please include entrance fees; food and drink; accommodation; shopping; hire / purchase equipment; car park; activity charges.)? **CODE ONE ONLY**

| <b>Estimated Spend (£)</b>   |   |
|------------------------------|---|
| Nothing                      | 1 |
| Up to £30                    | 2 |
| £31-£50                      | 3 |
| £51-£100                     | 4 |
| £101-£500                    | 5 |
| £501-£1,000                  | 6 |
| More than £1,000             | 7 |
| Don't know                   | 8 |
| Other (please specify below) | 9 |
|                              |   |

14. Could you tell how satisfied you are with following aspects of the Mournes area? **CODE ONE FOR EACH OPTION**

| <b>Satisfaction with aspects of the facilities</b> |                |                 |         |                    |                   |            |     |
|--|----------------|-----------------|---------|--------------------|-------------------|------------|-----|
|  | Very Satisfied | Quite Satisfied | Neither | Quite Dissatisfied | Very Dissatisfied | Don't Know | N/A |
| Scenery  | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |
| Car Parking  | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |
| Toilets  | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |
| Condition of the natural environment               | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |
| Provision of Tourist Information                   | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |
| Trails   | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |
| Signage  | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |
| Safety   | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |
| Value for money                                    | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |
| Public Access to the countryside                   | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |
| Shops / services                                   | 1              | 2               | 3       | 4                  | 5                 | 6          | 7   |



15. How likely are you to come back to the Mournes area during the next 12 months? **CODE ONE ONLY**

|                         |   |           |
|-------------------------|---|-----------|
| Will definitely be back | 1 | Go to Q16 |
| Very likely             | 2 |           |
| Quite likely            | 3 |           |
| Quite unlikely          | 4 | Go to Q17 |
| Very unlikely           | 5 |           |
| Will not be back        | 6 |           |
| Don't know              | 7 | Go to Q18 |

16. What activities are you most likely to participate in when you visit the Mournes during the next 12 months?

**DO NOT PROMPT - CODE ALL THAT APPLY**

| <b>Activities Undertaken</b>         |     |    |
|--------------------------------------|-----|----|
|                                      | Yes | No |
| Walking (other than around the town) | 1   | 2  |
| Visiting Ancient Monument            | 1   | 2  |
| Visit beach / swimming               | 1   | 2  |
| Visit towns / villages               | 1   | 2  |
| Visit bar / restaurant               | 1   | 2  |
| Cycling / mountain biking            | 1   | 2  |
| Orienteering                         | 1   | 2  |
| Canoeing                             | 1   | 2  |
| Fishing                              | 1   | 2  |
| Motor sports                         | 1   | 2  |
| Water sports                         | 1   | 2  |
| Golf                                 | 1   | 2  |
| Sailing                              | 1   | 2  |
| Climbing                             | 1   | 2  |
| Horse riding                         | 1   | 2  |
| Other (please specify below)         | 1   | 2  |
| <b>NOW GO TO Q18</b>                 |     |    |



17. If unlikely to return why do you say this?

**DO NOT PROMPT – CODE ALL THAT APPLY**

| Reason for not returning to the Mournes AONB              |     |    |
|---|-----|----|
|   | Yes | No |
| Too crowded   | 1   | 2  |
| Poor facilities at visitor attractions                    | 1   | 2  |
| Variety / like to visit other areas                       | 1   | 2  |
| Will not be in Northern Ireland within the next 12 months | 1   | 2  |
| Too expensive   | 1   | 2  |
| Poor condition of natural environment                     | 1   | 2  |
| Not enough / suitable activities                          | 1   | 2  |
| Poor accommodation  | 1   | 2  |
| Seen everything I want to in the area                     | 1   | 2  |
| Other (please specify below)                              | 1   | 2  |
|   |     |    |

18. Overall, how satisfied are you with the Mournes area?

**CODE ONE ONLY**

|                                    |   |           |
|------------------------------------|---|-----------|
| Very satisfied                     | 1 | Go to Q19 |
| Quite satisfied                    | 2 |           |
| Neither satisfied nor dissatisfied | 3 | Go to Q21 |
| Quite dissatisfied                 | 4 | Go to Q20 |
| Very dissatisfied                  | 5 |           |
| Don't know                         | 6 | Go to Q21 |

19. Why do you say you are satisfied?

**NOW GO TO Q21**

20. Why do you say you are dissatisfied?

21. Would you say that **the area / facility you visited today** was...?

**CODE ONE ONLY**

|                        |   |
|------------------------|---|
| Very over crowded      | 1 |
| A little over crowded  | 2 |
| Not really overcrowded | 3 |
| Not at all overcrowded | 4 |
| Don't know             | 5 |



**BACKGROUND INFORMATION**

I would now like to ask you some background questions. These will be used for analysis purposes only.

22. INTERVIEWER: Record gender of respondent

| Gender |   |        |   |
|--------|---|--------|---|
| Male   | 1 | Female | 2 |

23. In which of the following age groups do you fit?

**READ OUT – CODE ONE ONLY**

|       |   |       |   |       |   |     |   |
|-------|---|-------|---|-------|---|-----|---|
| 16-24 | 1 | 25-39 | 2 | 40-59 | 3 | 60+ | 4 |
|-------|---|-------|---|-------|---|-----|---|

24. In which of the following ethnic backgrounds would you describe yourself as belonging?

| ETHNIC BACKGROUND |   |                       |    |
|-------------------|---|-----------------------|----|
| White             | 1 | Other Asian           | 7  |
| Irish Traveller   | 2 | Black Caribbean       | 8  |
| Mixed             | 3 | Black African         | 9  |
| Indian            | 4 | Other Black           | 10 |
| Pakistani         | 5 | Chinese               | 11 |
| Bangladeshi       | 6 | Other (specify below) | 12 |

25. Could you tell the job title of the Chief Wage Earner in your household?  
(IF RETIRED – ASK FOR MOST RECENT JOB) – Note: Self-Employed is not a job title!

|  |
|--|
|  |
|--|

**READ OUT**

As part of our quality assurance procedures our research supervisors phone 10% of all respondents who participate in a survey. Would you provide your name and a telephone number where you can be contacted to confirm that you did take part in this research? **These details will not be used for any other purpose.**

| NAME | TELEPHONE NUMBER |
|------|------------------|
|      | 0                |

**INTERVIEWER: PLEASE NOW RECORD THE FOLLOWING INTERVIEW INFORMATION**

| DATE OF INTERVIEW |              |             | TIME OF INTERVIEW |               | LENGTH OF INTERVIEW |
|-------------------|--------------|-------------|-------------------|---------------|---------------------|
|                   |              | 2005        |                   |               |                     |
| <i>Day</i>        | <i>Month</i> | <i>Year</i> | <i>Hour</i>       | <i>Minute</i> | <i>Minutes</i>      |