

MOURNE HERITAGE TRUST



MOURNE & SLIEVE CROOB AONB

VISITORS SURVEY

November 2004

This project was funded by



EXECUTIVE SUMMARY

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 on the profile of visitors to the Mourne and Slieve Croob Area of Outstanding Natural Beauty (AONB) and examine the activities they undertake whilst in the area. 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 2004 research.

A second project implemented by Mourne Heritage Trust will install electronic counters at key visitor sites to obtain information on the number of visitors and the pattern of use of the area.

METHODOLOGY

Working in conjunction with Mourne Heritage Trust, RES designed a questionnaire to be used in the research. When the draft questionnaire was agreed a pilot study was undertaken. A total of 20 cases were completed at three different locations. Minor changes were made to the questionnaire and a final questionnaire was agreed.

In total 1,286 surveys were completed in 14 different locations throughout Mourne and Slieve Croob AONB. All surveys were completed between July and September 2004.

In total 52% of respondents were male, 48% female and 9% were in the age group 16-24, 34% were aged 25-39, 39% were aged 40-59 and 18% were aged over 60. Three quarters of respondents (77%) were from Northern Ireland and the ethnic background of the majority of respondents (99%) was white.

RESULTS

Visitors were initially asked what the main purpose of their visit to Mourne and Slieve Croob AONB was. The majority (55%) stated that they were on a day trip to the area and 37% stated that they were on holiday. In total 63% of respondents stated that they would be staying in the area for up to one day. Overall 25% stated that they would be staying for up to a week and 12% stated that they would be staying in the area for more than a week.

The majority of respondents (92%) either drove a car / van to the Mourne and Slieve Croob AONB that day, or were the passenger in a car. Other methods of transport used include walking, coach trip, motorcycle and bicycle.

One third of respondents (33%) stated that they would be visiting one location in the Mourne and Slieve Croob AONB on this trip and 44% stated that they would be visiting 2-3 locations. The most commonly mentioned locations were Newcastle town (57%), Warrenpoint (25%), Tollymore Forest (25%) and Silent Valley (23%).

The most commonly mentioned activities that respondents stated they would be participating in during this visit were: visiting towns / villages (50%); hill walking (47%); visiting bars / restaurants (46%); and swimming (39%).

Just under half of all respondents (47%) stated that they would be aware of how to access all activities in the area and 20% stated that they would know how to access 'most of them'.

In total 41% 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 Mourne and Slieve Croob AONB during their visit. Most of participants (41%) stated that they would be spending up to £30 in the area. In total 17% stated that they would not be spending anything.

Respondents were then asked to state how satisfied they were with various aspects of Mourne and Slieve Croob AONB. All respondents (100%) were either 'very satisfied' or 'quite satisfied' with the scenery in the area, 96% were satisfied with public access to the countryside and 93% were satisfied with the condition of the natural environment. Overall 93% were satisfied they were getting value for money and 91% were satisfied with car parking. Satisfaction was lowest with toilets facilities in the area (57% satisfied) and provision of tourist information (63% satisfied).

In total 71% of respondents stated that they would definitely return to Mourne and Slieve Croob AONB during the next 12 months and 21% 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=57) were asked the reason for this. The main reason given (60%) 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 during that visit. The main activities that would be undertaken during the next visit included visiting towns / villages (61%), visiting bars / restaurants (55%), hill walking (53%) and visiting the beach / swimming (50%).

In total 75% of respondents knew about the area because they had been before and 30% 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 6% of the sample.

Overall satisfaction of the visitors to Mourne and Slieve Croob AONB was high with 93% 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 Mourne and Slieve Croob AONB. 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 only 1% stated that it was 'very over crowded'.

TABLE OF CONTENTS

1.0	INTRODUCTION	1
2.0	METHODOLOGY	2
2.1	QUESTIONNAIRE DESIGN	2
2.2	SAMPLE SIZE AND SELECTION	2
2.3	BACKGROUND INFORMATION.....	3
3.0	RESULTS – VISITORS SURVEY (2004)	5
3.1	DESCRIPTION OF VISIT TO MOURNE AND SLIEVE CROOB AONB	5
3.2	TRANSPORT.....	6
3.3	AREAS LIKELY TO VISIT DURING TRIP.....	6
3.4	ACTIVITIES UNDERTAKEN DURING TRIP	8
3.5	ESTIMATED SPEND.....	11
3.6	SATISFACTION WITH VARIOUS ASPECTS OF MOURNE AND SLIEVE CROOB AONB.....	12
3.7	LIKELIHOOD OF RETURNING TO MOURNE AND SLIEVE CROOB AONB.....	13
3.8	ACTIVITIES THAT WILL BE PARTICIPATED IN DURING NEXT VISIT	14
3.9	SOURCES OF TOURIST INFORMATION	15
3.10	OVERALL SATISFACTION WITH MOURNE AONB.....	16
3.11	PERCEPTION OF CROWDING.....	17
4.0	SUMMARY AND CONCLUSIONS	18
4.1	SUMMARY	18
4.2	CONCLUSIONS.....	19

APPENDICES

Appendix 1: Questionnaire Used In Survey

Appendix 2: Explanation Of Socio Economic Groupings

1.0 INTRODUCTION

Tourism is the single biggest opportunity for growth in the Mourne economy. However 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, District 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 and Slieve Croob 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 Resources Rural Tourism Initiative, under the ‘Peace II Initiative’ of the EU. 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 Mournes. 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 May 2004 Mourne Heritage Trust commissioned Research and Evaluation Services (RES) to undertake 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 and conclusions.

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 Mourne and Slieve Croob AONB;
- Likelihood of returning;
- Overall satisfaction; and
- Views on crowding.

When the draft questionnaire was agreed a pilot study was undertaken. In total 20 cases were completed at three different locations. Minor changes were made to the questionnaire and the final questionnaire was agreed.

The questionnaire used is included in Appendix 1.

2.2 SAMPLE SIZE AND SELECTION

In total 1,286 surveys were completed in 14 different locations throughout Mourne and Slieve Croob AONB.¹ All surveys were completed between July and September 2004. Interviews were completed on all days of the week between 10am and 6pm.

In terms of sample selection, random sampling was employed for this research. 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 research².

In discussion with the Trust it was established that neither residents of Mourne and Slieve Croob 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.

¹ It is not possible to state that the data from this research is representative of all visitors to Mourne and Slieve Croob AONB throughout July and August unless the total population figures are available.

² 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.

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

Table 2.1 : Location for Interviews	Number of Completed Interviews
Donard Car Park, Newcastle	176
Warrenpoint town centre	170
Murlough National Nature Reserve	139
Silent Valley (car park)	138
Kilbroney Wood / Park (car park)	116
Cranfield (car park)	105
Tollymore Forest Park (car park)	101
Castlewellan Forest Park (car park)	86
Bloody Bridge (car park)	71
Carricklitle (car park)	57
Leitrim Lodge (car park)	54
Trassey Road / Meelmore Lodge (car park)	53
Drumkerragh Forest (car park)	18
Slieve Croob (car park)	2
TOTAL	1,286

It was initially discussed that a minimum of 70 interviews would be completed at each of the sites listed in Table 2.1 and that each site would be visited three times during the research period. However at five of the sites the numbers of visitors were low and so it was not possible to reach to original target figure.³

2.3 BACKGROUND INFORMATION

Table 2.2 provides background information about the respondents taking part in the 2004 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, 39% were aged 40-59 and 18% were aged over 60.
- 77% of respondents were from Northern Ireland, 10% were from England / Scotland / Wales and 6% from ROI.
- The ethnic background of the majority of respondents (99%) was white.
- 57% of the sample were in the ABC1 Socio Economic Group (SEG) and 33% were in the C2DE SEG. (See Appendix 2 for explanation of SEG.)
- In total 9% of respondents were visiting the area by themselves, 49% were with other adults and 43% had children in their group.

³ Interviewers were sent to each of these sites more than three times and they were asked to spend at least half a day there.

Table 2.2 : Profile of Respondents –			
		Number	Per cent
Gender	Male	675	52
	Female	611	48
Age	16-24	110	9
	25-39	441	34
	40-59	498	39
	60+	228	18
	Refused	9	1
Ethnic Background	White	1276	99
	Indian	2	-
	Other Asian	2	-
	Black Caribbean	1	-
	Chinese	4	-
	Other	1	-
Country of origin	Northern Ireland	987	77
	Republic of Ireland	83	6
	England / Scotland / Wales	124	10
	Other European country	39	3
	USA / Canada	30	2
	Other*	23	2
SEG	ABC1**	726	57
	C2DE**	424	33
	Refused / not enough info	136	11
Composition of Group	Single adult	111	9
	Two or more adults (no children)	627	49
	Adults with children	548	43
Base: All respondents (n=1286)			

*Other includes: Australia, Brazil, India, South Africa, Hong Kong, New Zealand,

**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 (2004)

This section outlines the results from the visitors' survey (2004).

3.1 DESCRIPTION OF VISIT TO MOURNE AND SLIEVE CROOB AONB

3.1.1 PURPOSE OF VISIT

Visitors were initially asked what the main purpose of their visit to Mourne and Slieve Croob AONB was. The majority (55%) stated that they were on a day trip to the area and 37% stated that they were on holiday, (see Table 3.1). Other reasons given include: to participate in a special recreational activity (4%); for social purposes (2%) and shopping (1%).

	Number	Per cent
Day trip	703	55
On holiday	474	37
Participate in a specific recreational activity	57	4
Social – to meet friends / family	29	2
Shopping	14	1
Student	1	-
Other*	8	1
Base: All respondents (n=1286)		

*Other includes: wedding; drive; camping.

3.1.2 LENGTH OF STAY

In total 27% of respondents stated that they would be staying in the area for up to half a day and 36% stated in would be for one day, (see Table 3.2). Overall 25% stated that they would be staying for up to a week and 12% stated that they would be staying in the area for more than a week.

	Number	Per cent
Half a day (up to six hours)	340	27
One day	458	36
Overnight	44	3
Weekend	112	9
Up to a week	166	13
Between 1-2 weeks	106	8
More than this	56	4
Don't know	4	-
Base: All respondents (n=1286)		

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 43% had just arrived, 24% were nearly half way through, 16% were half way through, 10% 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	554	43
Nearly half way through	311	24
Half way through stay	206	16
Nearly at end of stay	131	10
At the end of stay	84	7
Base: All respondents (n=1286)		

3.2 TRANSPORT

3.2.1 METHOD OF TRANSPORT USED

As shown in Table 3.4, 70% of respondents drove a car / van to Mourne and Slieve Croob AONB that day and 22% were the passenger in a car / van. Other methods of transport used include walking, coach trip, motorcycle and bicycle.

Table 3.4 : Method of Transport		
	Number	Per cent
Car / van (driver)	897	70
Car / van (passenger)	286	22
Walk	33	3
Coach Trip / Party	24	2
Public Transport (bus)	21	2
Motorcycle	7	1
Bicycle	7	1
Motor Home	7	1
Taxi	4	-
Base: All respondents (n=1286)		

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, 33% stated they would

be visiting one and 16% stated that they would be visiting 4-5 areas. Overall 7% stated they would be visiting six or more areas.

	Number	Per cent
One	426	33
2-3	562	44
4-5	211	16
6-9	76	6
10+	11	1
Base: All respondents (n=1286)		

Table 3.6 highlights that the most frequently visited area within Mourne and Slieve Croob AONB is Newcastle town (57%), 25% stated that they would be visiting Warrenpoint and 25% stated Tollymore forest.⁴

	Number	Per cent*
Newcastle Town	730	57
Warrenpoint	324	25
Tollymore Forest	313	25
Silent Valley	291	23
Kilkeel Coast	230	18
Castlewellan Forest	214	17
Murlough National Nature Reserve	205	16
Cranfield	200	16
Donard Park / Wood	196	15
Kilbrony Wood / Park	157	12
Mourne Uplands (mountain areas)	151	12
Bloody Bridge	129	10
Slieve Croob	28	2
Other**	122	10
Base: All respondents (n=1286)		

*Sum greater than 100% due to multiple responses.

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

⁴ These figures are directly related to the numbers of interviews that were completed at each site. As highlighted in Table 2.1 this varied between 176 completed interviews in Donard car park to 2 interviews in Slieve Croob.

3.4 ACTIVITIES UNDERTAKEN DURING TRIP

3.4.1 ACTIVITIES UNDERTAKEN

A wide range of activities are available for visitors to Mourne and Slieve Croob 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 2% of respondents stated that they would not be participating in any activities during their trip, 34% stated they would be participating in one, 44% stated that they would be participating in 2-3 activities, 17% in 4-5 activities and 4% in 6-9 activities.

	Number	Per cent
None	24	2
One	431	34
2-3	560	44
4-5	219	17
6-9	52	4
Base: All respondents (n=1286)		

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: visiting towns / villages; hill walking; visiting bars / restaurants; and visiting the beach / swimming.

Table 3.8 : Activities undertaken during trip		
	Number	Per cent*
Visit towns / villages	643	50
Hill walking**	601	47
Visit bar / restaurant	591	46
Visit beach / swimming	504	39
Walking***	158	12
Visiting Ancient Monument	110	9
Cycling / mountain biking	107	8
Fishing	65	5
Horse riding	66	5
Golf	42	3
Climbing	30	2
Water sports	28	2
Orienteering	15	1
Canoeing	14	1
Sailing	11	1
Motor sports	4	-
Other****	111	9
Base: All respondents who (n=1286)		

*Sum greater than 100% due to multiple responses.

**'Hill walking' was defined by the respondents themselves and therefore might include activities that might not be strictly classed as 'hill walking'.

***This is distinct from 'Hill Walking' category. Respondents perceived this as a more casual activity.

****Other includes: relaxing; picnic; play park; bird watching; tennis; shopping; painting.

3.4.2 KNOWLEDGE OF HOW TO ACCESS ACTIVITIES IN MOURNE AND SLIEVE CROOB 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 and Slieve Croob AONB. As shown in Table 3.9, 47% of respondents stated that they would know how to access all activities, 20% stated they would be able to access the majority, 16% said 'some of them', 9% 'not very many' and 7% 'none at all'.

	Number	Per cent
All of them	610	47
Most of them / majority	253	20
Some of them	201	16
Not very many	117	9
None at all	95	7
Don't know	10	1
Base: All respondents (n=1286)		

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

In total 41% of respondents (n=520) thought that there should be additional facilities in the area, 55% (n=698) did not think that there needed to be additional facilities provided in the area and 5% did not know. Those who stated that there should be more facilities (n=520) 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.

	Number	Per cent*
Improved toilet facilities	161	31
More coffee shops / restaurants / pubs	64	12
Indoor swimming pool / leisure facilities	52	10
Children's park and playground	47	9
More picnic areas	36	7
Improved signs / maps at tourist locations	28	5
More litter bins	25	5
Transport to tourist area	18	3
Improved facilities in car parks	16	3
More for families	15	3
Bigger / safer car parks	9	2
Other**	71	14
Base: Respondents who stated what additional facilities there should be in the Mourne area (n=520)		

*Sum greater than 100% due to multiple responses.

**Other includes: cable car up mountain; CCTV in car parks; showers at campsite; football park; skateboard facilities; tennis coaching; tourist news letter; cinema; extreme sports; go karting; improved disabled facilities; improved road markings; better transport; free parking; boat trips along coast.

3.5 ESTIMATED SPEND

Respondents were asked to provide information regarding their estimated spend in Mourne and Slieve Croob 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 (41%) stated that they would be spending up to £30 in the area. However 17% stated that they would not be spending anything.

Table 3.11 : Estimated spend in area		
	Number	Per cent
Nothing	214	17
Up to £30	521	41
£31-£50	123	10
£51-£100	119	9
£101-£500	186	15
£501-£1,000	50	4
More than £1,000	42	3
Don't know	31	2
Base: All respondents (n=1286)		

The following table highlights the location where respondents who stated they would spend 'nothing' were interviewed. It can be seen that 63% of those interviewed at Leitrim Lodge stated they would be spending nothing, 40% interviewed at Carricklittle and 37% interviewed at Murlough National Nature Reserve also stated that they would be spending 'nothing' during their visit to the area, (see Table 3.12).

Table 3.12 : Location of interviews		
	Number	Per cent of total interviewed at each site
Slieve Croob	2	100
Leitrim Lodge	34	63
Carricklittle	23	40
Murlough National Nature Reserve	52	37
Drumkerragh Forest	4	22
Cranfield	18	17
Castlewellan Forest Park	3	16
Bloody Bridge	11	15
Warrenpoint town centre	25	15
Tollymore Forest Park	14	14
Trassey Road / Meelmore Lodge	6	11
Donard Car Park, Newcastle	9	5
Silent Valley	7	5
Kilbroney Wood / Park	6	5
Base: Respondents who stated they would be spending 'nothing' during their visit (n=214)		

3.6 SATISFACTION WITH VARIOUS ASPECTS OF MOURNE AND SLIEVE CROOB AONB

Respondents were then asked to state how satisfied they were with various aspects of Mourne and Slieve Croob AONB. As shown in Table 3.13 all respondents (100%) were either 'very satisfied' or 'quite satisfied' with the scenery in the area, 96% were satisfied with public access to the countryside and 93% were satisfied with the condition of the natural environment. Overall 93% were satisfied they were getting value for money and 91% were satisfied with car parking. Satisfaction was lowest with toilets facilities in the area (57%) and provision of tourist information (63% satisfied).

Table 3.13: Satisfaction with a number of aspects of Mourne and Slieve Croob AONB

	Very Satisfied	Quite Satisfied	Neither	Quite Dissatisfied	Very dissatisfied	Don't know	N/A
Scenery	96	4	-	-	-	-	-
Public access to countryside	70	26	1	-	-	2	1
Condition of natural environment	64	29	3	3	-	-	-
Value for money	63	30	3	1	1	2	-
Car parking	66	25	4	3	1	1	1
Safety	46	39	4	2	1	6	3
Shops / services	42	33	8	6	3	5	4
Trails	46	27	4	1	1	17	4
Signage	41	28	6	7	5	9	3
Provision of Tourist Information	39	24	8	5	3	19	3
Toilets	35	22	7	15	13	8	-

Base: All respondents (n=1286)

3.7 LIKELIHOOD OF RETURNING TO MOURNE AND SLIEVE CROOB AONB

In total 71% of respondents stated that they would 'definitely return' to Mourne AONB during the next 12 months (see Table 3.14). As well as this, 21% stated that they would be 'quite likely' or 'very likely' to return to the area in the next 12 months. Overall 5% of respondents stated that they would be unlikely or would not be returning in the next 12 months and 4% did not know.

Table 3.14 : Likelihood of returning to Mourne and Slieve Croob AONB within the next 12 months

	Number	Per cent
Will definitely be back	908	71
Very likely to return	182	14
Quite likely to return	87	7
Quite unlikely to return	10	1
Very unlikely to return	21	2
Will not be back	26	2
Don't know	52	4

Base: All respondents (n=1286)

Those respondents who stated that they would be unlikely to return to the area (n=57) were asked the reason for this. As shown in Table 3.15 the main reason given (60%) was that respondents would not be in Northern Ireland in the next 12 months.

	Number	Per cent
Will not be in Northern Ireland within the next 12 months	34	60
Seen everything I want to in the area	4	7
Personal	4	7
Other plans	4	7
Poor facilities for children	3	5
Too expensive	2	4
Not enough / suitable activities	2	4
Too crowded	2	4
Poor facilities at visitor attractions	1	2
Variety / like to visit other areas	1	2
Base: Respondents who stated that they would not be in Mourne and Slieve Croob AONB again (n=57)		

3.8 ACTIVITIES THAT WILL BE PARTICIPATED IN DURING NEXT VISIT

Those respondents who stated that they would be in the area again were asked to state what activities they would be likely to participate during their next visit. As shown in Table 3.16 the main activities that would be undertaken include: visiting towns / villages (61%); visiting bars / restaurants (55%); hill walking (53%); and visiting the beach / swimming (50%).

	Number	Per cent*
Visit towns / villages	708	61
Visit bar / restaurant	642	55
Hill walking**	623	53
Visit beach / swimming	582	50
Cycling / mountain biking	152	13
Visiting Ancient Monument	150	13
Walking***	113	10
Horse riding	78	7
Golf	66	6
Fishing	65	6
Climbing	49	4
Water sports	46	4
Orienteering	30	3
Canoeing	30	3
Sailing	22	2
Motor sports	10	1
Other****	42	4

Base: Respondents who stated that they would be Mourne and Slieve Croob AONB within next 12 months (n=1167)

*Sum greater than 100% due to multiple responses.

** 'Hill walking' was defined by the respondents themselves and therefore might include activities that might not be strictly classed as 'hill walking'.

***This is distinct from 'Hill Walking' category. Respondents perceived this as a more casual activity.

****Other includes: motorcycling; shopping; jogging; pitch and putt; picnic; ballroom dancing; amusements; fitness training; abseiling; 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 three quarters of respondents stated that they knew about the area because they had been before and for 30% of respondents they got information through 'word of mouth'.

	Number	Per cent*
Been here before	960	75
Word of mouth	385	30
TIC	77	6
Brochure	50	4
Live close by	38	3
Internet	32	3
Travel Agent	23	2
Friends and family	17	1
Advert in paper	10	1
Other**	28	2
Base: All respondents (n=1286)		

*Sum greater than 100 due to multiple responses.

**Other includes: General knowledge; unplanned visit; maps / signs; Yellow Pages; Books.

3.10 OVERALL SATISFACTION WITH MOURNE AONB

Overall satisfaction with the area was high with 93% 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 4% stated that they were 'neither satisfied nor dissatisfied,' (Table 3.18).

	Number	Per cent
Very satisfied	974	76
Quite satisfied	223	17
Neither satisfied nor dissatisfied	46	4
Quite dissatisfied	24	2
Very dissatisfied	3	-
Don't know	16	1
Base: All respondents (n=1286)		

3.10.1 REASONS WHY PARTICIPANTS ARE SATISFIED

Respondents were asked to give reasons why they stated that they were satisfied with Mourne and Slieve Croob AONB. As shown in Table 3.19 the majority (69%), stated that it was because of the natural beauty in the area. Other reasons given include the relaxed atmosphere (30%) and nice area for a walk (11%).

	Number	Per cent*
Natural beauty in area	827	69
Relaxed atmosphere	363	30
Nice area for a walk	136	11
Hospitality is exceptional	76	6
Easy to get to	60	5
Lots of activities for all ages	57	5
Area is clean and tidy	47	4
Beach	36	3
Facilities are close by	22	2
Air quality good	24	2
Good value for money	18	1
Other*	52	4
Base: Respondents who gave reasons why they are satisfied with Mourne area (n=1197)		

*Sum greater than 100 due to multiple responses.

**Other includes: good surfing, good accommodations, golf course good, like Northern Ireland, facilities are safe, good fishing, solitude, meet new people

3.10.2 REASONS WHY PARTICIPANTS ARE DISSATISFIED

Respondents were asked to give reasons why they stated that they were dissatisfied with Mourne and Slieve Croob AONB. In total 23 did and reasons for dissatisfaction included poor toilets, dog fouling on beach, jet skis danger to swimmers, need more activities for children, too many apartments, poor campsite facilities, poor public transport and poor security.

3.11 PERCEPTION OF CROWDING

Finally respondents were asked to comment on their perception of crowding at the areas they had visited in Mourne and Slieve Croob AONB. 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).

	Number	Per cent
Very over crowded	16	1
A little over crowded	70	5
Not really over crowded	393	31
Not at all over crowded	766	60
Don't know	41	3
Base: All respondents (n=1286)		

4.0 SUMMARY AND CONCLUSIONS

4.1 SUMMARY

The key results from the 2004 survey of visitors to Mourne AONB are summarised below.

- The majority of respondents (55%) were on a day trip to Mourne and Slieve Croob AONB and 37% stated that they were on holiday, (see Table 3.1).
- In total 27% stated that they would be staying in the area for up to half a day and 36% would in the area for a day, (see Table 3.2).
- The vast majority of respondents (92%) had travelled to Mourne and Slieve Croob AONB by car – either as a passenger or driver, (see Table 3.4).
- One third of respondents (33%) stated that they would be visiting one location within Mourne and Slieve Croob AONB on this trip and 44% stated that they would be visiting 2-3 locations, (see Table 3.5).
- The most commonly mentioned locations were Newcastle town, Warrenpoint, Tollymore Forest and Silent Valley, (see Table 3.6).
- The most commonly mentioned activities that respondents stated they would be participating in are: visiting towns / villages; hill walking; visiting bars / restaurants; and visiting beach / swimming, (see Table 3.8).
- Just under half of all respondents (47%) stated that they would be aware of how to access all activities in the area and 20% 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 and Slieve Croob AONB. The most frequently mentioned were: improved toilets; more coffee shops / restaurants / pubs; indoor swimming pool / leisure facilities; and a children's park / play area, (see Table 3.10).
- The estimated spend in the area was relatively low with 17% of respondents stating that they would be spending nothing. A further 41% stated that they would be spending 'up to £30' and 10% stated that they would be spending '£30-£50', (see Table 3.11).
- Satisfaction with a range of aspects of Mourne and Slieve Croob AONB was very high. In total 100% stated that they were satisfied with the scenery, 96% were satisfied with public access to the countryside, 93% were satisfied with the condition of the natural environment, 93% thought they had got value for money, and 91% were satisfied with car parking. Areas of least satisfaction were toilet facilities (57% satisfied), provision of tourist information (63% satisfied) and signage (69% satisfied). See Table 3.13 for full details.
- In total 71% of respondents stated that they would 'definitely be back' to Mourne and Slieve Croob AONB within the next 12 months and 14% stated that they would be 'very likely to return', (see Table 3.14).

- The majority (60%) of those who stated that they would not be back to the area (n=57) said that this was because they would not be in Northern Ireland again within the next 12 months, (see Table 3.15).
- 75% of respondents knew about the area because they had been before and 30% had got information through word of mouth, (see Table 3.17).
- Overall satisfaction of the visitors to Mourne and Slieve Croob AONB was high with 76% stating they were 'very satisfied' and 17% stating that they were 'quite satisfied', (see Table 3.18).
- The main reason give 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 60% of respondents stated that the area was 'not over crowded at all' and a further 31% stated that it was 'not really over crowded', (see Table 3.20).

4.2 CONCLUSIONS

Profile of Main Visitor Type

Visitors to Mourne and Slieve Croob AONB are most likely to be from Northern Ireland and will stay in the area for up to one day. The majority of visitors will have driven their car to the area and will visit up to three places during their trip.

The key activities they will undertake include visiting towns and villages, hill walking, visiting bars and restaurants and visiting the beach / swimming and these are the activities that they will undertake during their next visit to the area.

The majority of visitors will spend up to £50 in the area although 17% stated that they would not spend anything during their trip.

Visitors to Mourne and Slieve Croob AONB are likely to be satisfied or very satisfied with a range of aspects of the AONB and the majority stated that they would definitely be back to the area.

Additional Comments

Prior to commencing the research it was indicated that there was a potential conflict between attracting additional visitors to the area and negative impact associated with over crowding. From the research findings it is evident that currently very few visitors to the area have any concerns regarding over crowding and therefore action could be taken to encourage increased visitor numbers to the area.

As shown above the main visitors to the area reside in Northern Ireland and as such, this is the group that could be targeted in future Marketing Campaigns.

It is also evident that a large number of local people come to the area for one day only. Accommodation providers should be involved in the collective promotion of the town as an overnight or weekend destination. This would increase the revenue spent in the area, which, for the majority of visitors is currently at a low level.

Recommendations for Further Research

- This research highlights that visitors to the area are very satisfied with Mourne and Slieve Croob AONB and it provides detailed background information regarding these visitors and what they do whilst in the area. Future research might consider surveying residents of Northern Ireland who are not frequent visitors to the area to ascertain their perception of the area and examine what would encourage them to visit the area more often.
- Focus group research with visitors to the area might provide additional insight into aspects of interest to the tourist providers in the area. For example it would be useful to discuss what might encourage increased over night stays in the area?
- The research shows that 43% of respondents had children with them on their visit to the area. It might also be important to examine in future research what additional children's facilities would prove popular with this visitor type.
- It is acknowledged that this research will be repeated over the next two years. Results from this three year period can be examined in relation to any additional marketing campaigns and / or changes to the facilities in the area.

APPENDIX 1
QUESTIONNAIRE

OFFICE USE ONLY		
QUESTIONNAIRE NUMBER		

This questionnaire is the property of:	
RESEARCH AND EVALUATION SERVICES City Link Business Park Belfast, BT12 4HB	
Tel: 028 9050 7777	Fax: 028 9050 7779

MOURNE HERITAGE TRUST

VISITORS SURVEY

2004

version 2

TO BE COMPLETED BY INTERVIEWER

LOCATION – INTERVIEWER CIRCLE ONE ONLY			
Donard Car Park	1	Meelmore Lodge	8
Murlough Bay	2	Leitrim Lodge	9
Bloody Bridge	3	Carricklittle	10
Tollymore forest	4	Slieve Croob	11
Castlewellan Forest	5	Cranfield	12
Kilbrony Wood / Forest	6	Warrenpoint	13
Silent Valley	7	Drumkerragh Forest	14
DATE OF INTERVIEW			
TIME OF INTERVIEW			
INTERVIEWER NAME			
INTERVIEWER NUMBER			
LENGTH OF INTERVIEW			

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.

Can I firstly ask....

a. Do you live in the Mourne and Slieve Croob area of outstanding natural beauty?
(SHOW MAP)

Yes	1	Thank and close interview
No	2	Go to Qb
Don't know	3	Thank and close interview

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

Yes	1	Thank and close interview
No	2	Go to Qc

c. Are you aged 16+?

Yes	1	Go to Q1
No	2	Thank and close interview

1. Could you now tell me what is your country of origin?

Country of Origin	
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?

NUMBER OF ADULTS	NUMBER OF CHILDREN (under 16)	TOTAL

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

Method of Transport Used	
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

Purpose of Visit	
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 Mourne area during this visit?
CODE ONE ONLY

Length of stay	
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 Mourne area are you?
CODE ONE ONLY

Length of stay	
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 Mourne and Slieve Croob AONB are you likely to visit during this trip?
(RECORD ALL – DO NOT PROMPT)

Area Visited	
Newcastle Town	1
Donard Park / Wood	2
Murlough Bay	3
Bloody Bridge	4
Tollymore Forest	5
Castlewellan Forest	6
Kilbrony Wood / Park	7
Silent Valley	8
Kilkeel Coast	9
Mourne Uplands (mountain areas)	10
Slieve Croob	11
Cranfield	12
Warrenpoint	13
Other (please specify below)	15

8. Could you tell me which of the following activities you will be undertaking during your visit to Mourne and Slieve Croob AONB?
(READ OUT – CODE ALL THAT APPLY)

Activities Undertaken		
	Yes	No
Hill walking	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 and Slieve Croob AONB?

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?

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

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)

Facilities	
Word of mouth	1
Been here before	2
Live close by	3
Brochure	4
Tourist Information Centre	5
Travel Agent	6
Internet	7
Advert in paper / magazine	8
Other (please specify below)	9

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

Estimated Spend (£)	
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 Mourne and Slieve Croob AONB?

Satisfaction with aspects of the facilities							
	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	Go to Q16
Quite likely	3	Go to Q16
Quite unlikely	4	Go to Q17
Very unlikely	5	Go to Q17
Will not be back	6	Go to Q17
Don't know	7	Go to Q18

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

(DO NOT PROMPT - CODE ALL THAT APPLY)

Activities Undertaken	
	Yes
Hill walking	1
Visiting Ancient Monument	2
Visit beach / swimming	3
Visit towns / villages	4
Visit bar / restaurant	5
Cycling / mountain biking	6
Orienteering	7
Canoeing	8
Fishing	9
Motor sports	10
Water sports	11
Golf	12
Sailing	13
Climbing	14
Horse riding	15
Other (please specify below)	16
NOW GO TO Q18	

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

(DO NOT PROMPT – CODE ALL THAT APPLY)

Reason for not returning to the Mourne AONB	
	Yes
Too crowded	1
Poor facilities at visitor attractions	2
Variety / like to visit other areas	3
Will not be in Northern Ireland within the next 12 months	4
Too expensive	5
Poor condition of natural environment	6
Not enough / suitable activities	7
Poor accommodation	8
Seen everything I want to in the area	9
Other (please specify below)	10

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

Overall satisfaction		
Very satisfied	1	Go to Q19
Quite satisfied	2	Go to Q19
Neither satisfied nor dissatisfied	3	Go to Q21
Quite dissatisfied	4	Go to Q20
Very dissatisfied	5	Go to Q20
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...?

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**

In which of the following age groupings do you fit?			
16-24	1	40-59	3
25-39	2	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										
----------	--	--	--	--	--	--	--	--	--	--

Thank and close

APPENDIX 2
SOCIO ECONOMIC GROUPS

SOCIO ECONOMIC GROUP (SEG) CLASSIFICATION

In the vast majority of research projects it is important to gather information regarding the economic background of respondents. One method commonly used is to assign SEG to individuals.

All respondents were asked to provide details of the job that the Chief Wage Earner in their household holds. If that person is retired respondents are asked to provide details of their last paid employment or self employed role. From this a Socio Economic Group (SEG) can be assigned to each individual which is intended to reflect living circumstances.

National Statistics (statistics.gov.uk) have compiled a list of occupations and assigned a SEG to each. The broad title assigned to each group (A-E) is listed below.

A : Professional;
B : Managerial / Technical;
C1 : Skilled, non manual;
C2 : Skilled, manual;
D : Partly skilled;
E : Unskilled.

It is commonplace to group these classifications into two – ABC1 and C2DE.

This survey was undertaken by:

Research and Evaluation Services (RES)
City Link Business Park
Albert Street
Belfast
Northern Ireland
BT12 4HB