



DAERA

Department of Agriculture,  
Environment and Rural Affairs

# NORTHERN IRELAND FORESTS VISITOR SURVEY 2019

The Forest Service logo, featuring a stylized tree icon above the text "FOREST SERVICE".

FOREST SERVICE

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# 1. Executive summary

## 1.1 Key findings

- An estimated 8.97 million visits were taken to forests on the Forest Service Forest Estate in 2019.
- An average of £24.60 (including accommodation) was spent during visits taken to the surveyed forests, of this total an average of around £3.98 was spent within the forest.
- 78% of visitors are adults (aged 16 or older)
- The estimated total annual spend during trips that involve visiting a publicly accessible Forest Service location (including any amounts spent on accommodation) is £172 million.
- The most popular activities on visits to the surveyed forests were walking (65% of visits) and dog walking (41% of visits).

## 1.2 Background

- The Forest Service of Northern Ireland is an Executive Agency within the Department of Agriculture, Environment and Rural Affairs (DAERA). The agency aims to promote the sustainable management of forests in Northern Ireland whilst promoting their use for a range of purposes including recreation and tourism.
- An initial study completed in 2012 highlighted the potential benefits to be obtained from greater development of Northern Ireland's forests for recreation and tourism.
- This was followed by a benchmark study conducted in 2014 that would estimate the volume and value of visitor trips.
- This study was followed by a tracking wave of research completed in 2019.

## 1.3 About the survey

- Fieldwork for the survey was conducted over the 8 months from May to December 2019. During this period, data was collected through manual counting and face to face interviews, with 202 days of fieldwork undertaken. During this period a total of 1441 visitor interviews were conducted in 11 forests in the Forest Service forest estate.

## Estimated visitor numbers to the surveyed forests

Across the 11 forests, the largest annual volumes of visits were recorded at Hillsborough with an estimated 285,000 visitors, Castlewellan at 276,000 and Belvoir with 245,000.

## Profile of visitors to the surveyed forests

- The average age of a visitor (including children) is 35. This average varies by forest with the youngest age profile at Gortin Glen (average age 27) and the oldest at Somerset (average age 48).
- Just 1% of visitors are members of the Black, Asian and Minority Ethnic (BAME) population, a similar proportion to that found within the wider Northern Irish population (1.8%).
- 9% of visitor parties contained at least one person with a disability, a lower proportion than found across the Northern Ireland population as a whole (31%).
- 89% of visitors live in Northern Ireland, 5% live elsewhere in the UK, 2% are from the Republic of Ireland and 4% are international visitors.
- Overall 11% of visitors are on an overnight holiday or short break.
- 7 in 10 visitors (70%) live in the same council area as the forest which they are visiting.

## 1.6 Visit characteristics

- Around nine out of ten visitors are on a repeat visit to the forest (87%).
- Almost two thirds take part in a walk in the forest (65%) while 2 in 5 visitors take part in dog walking (41%). 12% of visits include seeing something in the woodland such as wildlife, and 11% involve a picnic.
- Just over half (56%) of visits last less than an hour. Therefore 44% of visitor trips last at least one hour. The advice from the Public Health Agency (PHA) in relation to physical activity is that 150 minutes of moderate exercise per week is advisable (where more vigorous exercise isn't feasible). This equates to 2.5 one-hour walks per week (or five 30-minute walks), thus demonstrating the health benefits of forest activity. A recent study carried out by National Trust in partnership with Northern Ireland Environment Link identified the hidden value of nature in terms of physical and mental wellbeing. The study concluded a notable positive impact in terms of clinical spending within the NHS.
- The vast majority of visits are taken by car (93%). Forests with a higher proportion of visitors travelling by means other than motor vehicle are Tollymore (19%) and Lough Navar (17%).
- 80% of visitors spent money during their forest trip (including money spent outside the forest). Average spend is £24.60 with most of spend relating to transport and food/drink.

## 2. About the survey

### 2.1 Forest Service

The Forest Service of Northern Ireland is an Executive Agency within the Department of Agriculture, Environment and Rural Affairs (DAERA). The agency aims to promote the sustainable management of forests in Northern Ireland whilst promoting their use for a range of purposes including recreation and tourism.

Since the establishment of the Forestry Act (NI) 2010 the Assembly has endorsed the Forest Service vision for the Department's forestry lands which includes promotion of the wider social and recreational use. This has seen actions such as the establishment of a public right of casual access on foot in March 2013.

An assessment of existing and potential tourism development opportunities available from forests in Northern Ireland was completed during 2012. This study was jointly commissioned by the Forest Service and NI Tourist Board. Outputs from the study have been presented on a Forest Service wide basis, as well as for three cluster areas with specific and significant tourism potential: West Fermanagh, Mourne and Antrim Glens.

This study underpinned the Executive's decision to allocate £4m to forestry tourism projects under the Economy and Jobs Initiative; as a result Forest Service delivered many projects to improve and enhance tourism and recreation within forests during 2014-2016. Developing and implementing tourism projects in forests is now a key business focus for the Forest Service.

This investment has also supported several partnership agreements between Forest Service and District Councils since the previous survey. It is against this background that establishing a sound evidence base detailing visitor numbers and the types of visitors coming into Northern Ireland's forests has become an important consideration. An understanding of visitor numbers, profiles and economic impact is of significant interest at forest sites receiving investment funding and tourism promotion. Forest Service previously carried out a visitor survey in 2014, which is the benchmark for volume and value of forest visits.

### 2.2 Survey Background

The purpose of this Contract was to undertake a follow up survey at specified sites to provide: An assessment of visitor numbers, visitor profiles, site satisfaction and the value of forest visits across DAERA forest estate

- A baseline dataset enabling future assessment of change to visitor numbers, visitor profiles, site satisfaction and the value of forest visits
- A robust and tested survey method suitable for repeat enumeration.
- A comparison and analysis of change in perception and appreciation of visitors since the last forest service visitor survey, particularly in relation to areas of investment and partnership working.
- Comparison of trends with 2014 survey results.

## 2.3 Methodology

This section provides a summary of the survey and analysis approaches used. Copies of the fieldwork materials used are provided in the report Appendix (pg. 40 ff.). In effect the methodology was designed to replicate the survey precisely conducted in 2014, with one additional forest park (Somerset, Coleraine) added to the sampled locations.

### 2.3.1 Fieldwork - interviews

A total of 202 days of fieldwork were undertaken. During these days fieldworkers manually counted visitors entering and leaving the forest and undertook interviews with a random sample of visitors aged 16 and over at the end of their visit.

Interviewers were assigned to either a 'count only' shift or a 'combined shift' where both counting and interviewing were undertaken. On a combined shift where it was not possible to complete both counting and interviewing (due to visitor volume), the manual counting was given priority in order to aid with the production of the visitor estimates.

Visitor interviews

**A total of 1441 interviews were completed between May and December 2019.**

	<b>Interviews achieved</b>
Belvoir Forest	138
Castlewellan Forest Park	156
Drum Manor Forest	158
Florence Court Forest	95
Glenariff Forest	161
Gortin Glen Forest	181
Gosford Forest	123
Hillsborough Forest	138
Lough Navar Forest	104
Somerset Forest	75
Tollymore Forest Park	112
<b>Total</b>	<b>1441</b>

The fieldwork days were distributed across the forests shown in the table above to reflect the levels of visitor throughput and information requirements at each forest.

Each of the sites had a number of different official and unofficial access points with levels of use varying significantly between these points. During the survey set up stages, each access point was classified as having either high, medium or low usage. The fieldwork schedule was then designed to reflect these variations, providing greater representation of the busiest points. The schedule was monitored as fieldwork progressed, with any necessary adjustments made.

Compared to an approach involving an equal spread of fieldwork over the busiest and quietest locations, having a focus on the busiest points provided:

- A more efficient use of interviewer resources to maximise the potential for interviews;

- A more representative sample of interviews. The greater number of hours of fieldwork at busier locations ensured that visitors at these places have an equal chance of inclusion in the survey sample;
- More robust count estimates with the longest sampling periods at the places with the highest visitor throughput.

The fieldwork period ran from May to December 2019. As a 12-month survey period was not possible, this provided sufficient seasonal coverage to allow visitor profiles and throughput rates to be covered across peak and off-peak periods.

At each forest, the days of interviewing were distributed to broadly reflect the likely pattern of visits over the fieldwork period. When scheduling fieldwork days, atypical periods such as major events taking place in a forest were avoided so as not to bias the survey results.

The fieldwork interviewing shifts undertaken were each 6 hours in duration, normally between 10am and 7pm.

It was not possible to undertake fieldwork during every potential time period at every access point. When allocating shifts, the priority was to cover those periods and places where visitor throughput was highest - it was these times and locations which contributed most to the overall visit total. Therefore, greater coverage of these periods helped to improve the accuracy of the final results more than coverage of a wider range of times and locations with lower visitor throughput would have. This is a similar approach to that used successfully other surveys of this nature.

#### *Manual counting*

In addition to the interviews undertaken at each of these sites, interviewers recorded visitor volumes using a simple count form at each access point, with a separate record made of visitors entering and leaving.

Interviewers were instructed to count all vehicles entering and leaving the site, with the number of occupants in each vehicle arriving and leaving recorded separately. Counts were also taken for visitors entering and leaving the forests who were not in motorised vehicles, e.g. on foot, bike, horse etc.

The date, shift start and end time and times for breaks taken were recorded to allow an accurate assessment of visitor numbers to be obtained and used to produce visitor estimates.

A copy of the manual count form used can be found in the report appendices.

### **2.3.2 Data analysis and grossing**

The approaches used to analyse the survey data and produce estimates of total visits are shown below:

#### *Estimating volumes of visits – surveyed sites*

- Manual counts of visitors entering and leaving were undertaken across a range of entrances/exits, days of the week and times of the year. The manual counts undertaken at weekends and on weekdays were then averaged for by season. These seasonal averages were then multiplied by the number of high and low season days in 2019 and summed across the survey points to produce an estimate of annual visits for each surveyed forest. We then used internal footfall count data supplied by operators of the

various forest parks as a sense check to ensure the volume data is as robust and as reliable as possible.

#### *Estimating total volumes of visits to all forests*

- It was not feasible for fieldwork to be undertaken at every Forest Service forest, so the volumes of visits taken at locations where no survey work was undertaken were estimated.
- These estimates were produced using data from the closest equivalent surveyed sites. This process was informed using input from the Forest Service to stratify forests into different levels of usage (using a high, medium, and low banding).
- Typical throughput levels in each 'strata' were then applied to the forests not included in the survey to allow estimates of annual visitor numbers to be produced. These were then totaled to produce an overall estimate.
- We then used internal footfall count data supplied by partnership organisations who operate some of the various forest parks to sense check the figures.

#### *Weighting interview data*

- The data from the interviews conducted with visitors was weighted using the estimates of total annual visits to each forest to improve the representativeness of these findings. The weight in effect is a value assigned to each case in the data set, and corrects for any particular over incidence of visitors based on the known profile of the population (total annual visitors across all forests sampled and not sampled). The survey data has been weighted to ensure representativeness by the relative sizes of population (i.e. total visitor numbers per park).

### **2.3.3 Note on rounding**

Note that in the sections that follow, results are presented as estimates of total visits to forests and percentages of totals.

In some cases percentages do not total 100% due to the effects of rounding (i.e. the percentages shown total 99% or 101%).

### **2.3.4 Note on base sizes**

The base sizes show the number of interviews undertaken for each question, in total, and for each individual forest. In some cases, the base size may be less than 50 respondents, these are marked with an asterisk, and caution should be observed when using these data.



## 3. Number of visits to Forest Service Forests

This section contains key survey results including estimates of the total annual volume of visits taken and estimates by forest.

### 3.1 Total visits to Forest Service forest estate

An estimated **8.97 million visits** are taken annually to forests managed by the Forest Service.

### 3.2 Estimated visits by sampled forest

Table 1 below provides estimates of annual visits for each of the 11 surveyed forests.

TABLE 1 –ESTIMATED ANNUAL VISITS BY FOREST

	Volume of visits ('000s)
Belvoir	245
Castlewellan	276
Drum Manor	116
Florence Court	44
Glenariff	133
Gortin Glen	85
Gosford	171
Hillsborough	285
Lough Navar	40
Somerset	108
Tollymore	177
<b>TOTAL</b>	<b>1680</b>

## 4. Profile of visitors to the eleven surveyed Forests

This section contains key survey results regarding the profile of people who visit including demographics, place of residence and the nature of trip being taken when forests are visited.

### 4.1 Party composition

Overall the **average party size is 2.39** people, but this varies by forest. **Tollymore** has the highest average party size at 3.71. This is followed by **Gortin Glen (2.99)**, **Gosford (2.83)** and **Glenariff (2.82)**. **Somerset** and **Belvoir** saw the lowest averages (1.41 and 1.66 respectively).

49% of visitors to the surveyed forests were male and 51% were female, this ratio did not vary significantly between forests.

TABLE 2 - PARTY COMPOSITION BY FOREST

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
<b>Average Party size</b>	2.41	3.71	2.82	2.55	2.69	2.83	1.66	2.73	2.02	2.99	1.41	2.39
<b>Male</b>	49%	54%	49%	43%	49%	47%	52%	45%	46%	45%	57%	49%
<b>Female</b>	51%	46%	51%	57%	51%	53%	48%	55%	54%	55%	43%	51%
<b>Age (yrs)</b>												
<b>0 to 15</b>	23%	17%	17%	22%	20%	34%	11%	32%	16%	41%	13%	22%
<b>16-34</b>	19%	37%	19%	14%	21%	16%	19%	25%	19%	22%	18%	23%
<b>35-54</b>	33%	30%	34%	24%	32%	24%	33%	26%	23%	28%	30%	29%
<b>55-64</b>	14%	9%	14%	15%	17%	11%	23%	7%	17%	6%	11%	13%
<b>65+</b>	11%	6%	16%	24%	10%	14%	15%	10%	25%	3%	28%	14%
<b>Average age</b>	33	31	38	37	31	28	44	26	40	27	48	<b>35</b>
<b>Average adult age</b>	48	49	48	54	46	49	50	43	51	40	55	49
<b>BASE</b>	n=156	n=112	n=161	n=95	n=104	n=123	n=138	n=158	n=138	n=181	n=75	n=1441

The average age of visitors to the surveyed forests was 35. The average varied considerably on account of varying volumes of children in visiting parties, with Somerset the highest (ave. age

48), and Drum Manor the lowest (ave. age 26). Amongst the sample of surveyed adults, the average age was 49. This average adult age was much less variable.

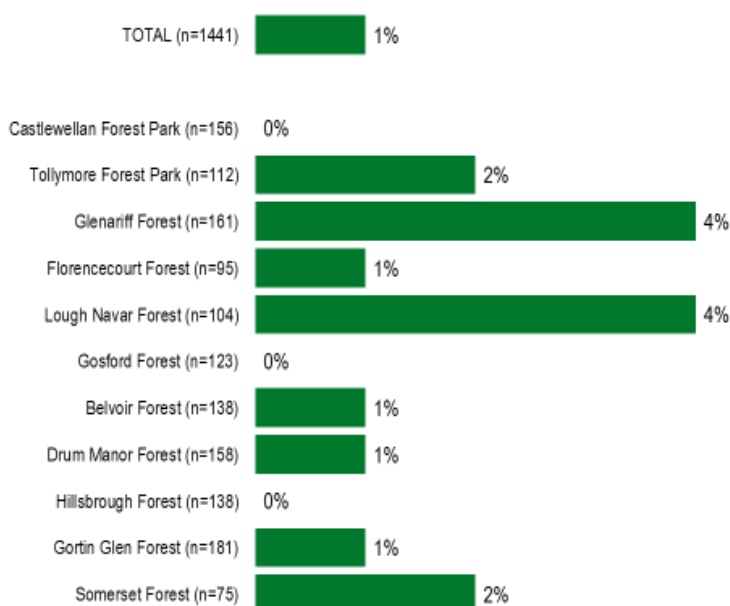
Overall around a fifth (22%) of visitors to the surveyed forests were children (under 16). **Gortin Glen** had the highest proportion of children visiting, with 41% of visitors aged 15 or under, while **Belvoir** had the joint lowest at 11%.

## 4.2 Ethnicity

Overall, around 1% of visitors indicated that they were members of the Black, Asian and Minority Ethnic (BAME) population, a slightly lower proportion than found within the population of Northern Ireland as a whole (1.8%<sup>1</sup>).

The highest proportions of BAME visitors were recorded at Lough Navar and Glenarriff, where 4% of the sample were members of the BAME population.

FIGURE 1 – VISITOR PROFILE - BAME POPULATION (%)



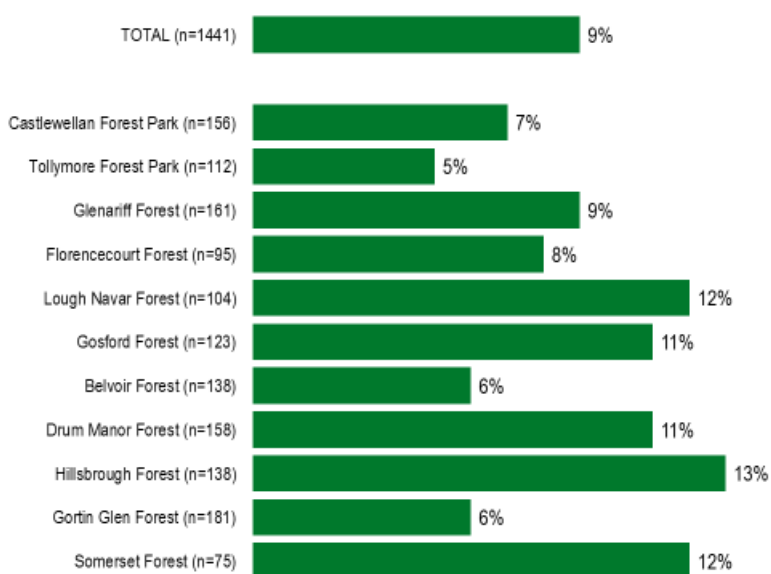
<sup>1</sup> 2011 Census data, NISRA

### 4.3 Disability

Overall, 9% of visitors indicated that they had a long-term illness, health problem or disability. This is a significantly lower proportion than in the population of Northern Ireland as a whole (31%<sup>2</sup>).

The proportion of visitors with a disability varied somewhat by forest. The highest proportions of visitors with a long-term illness or disability were recorded at Hillsborough (13%). Tollymore was the forest with the lowest proportion of visitors who indicated the presence of a long-term health issue or disability (5%).

FIGURE 2 – VISITOR PROFILE – LONG-TERM ILLNESS/ HEALTH PROBLEM/ DISABILITY ( % )



As shown in the table below, around half of visitors who stated that they had a disability stated that this was a mobility issue (56%), 1 in 4 stated another physical health issue (27%) while around 1 in 7 indicated they had a mental health disability (16%).

TABLE 3 – NATURE OF DISABILITY ( % )

Visitors with a disability	
Mobility	56%
Vision	2%
Hearing	5%
Mental health	16%
Physical health	27%
Other	3%
Refused	9%
Base	<b>n=129</b>

<sup>2</sup> Northern Ireland Statistics and Research Agency 'Census 2011: Key statistics for Northern Ireland'

## 4.4 Country of residence

Across all sites surveyed, around nine in ten of those who visited (89%) stated that they lived in Northern Ireland. This proportion varied between the individual sites surveyed, with the highest proportions recorded at **Somerset** (100%), **Hillsborough** (97%) and **Belvoir** (96%) and the lowest at **Glenariff** (59%) and **Lough Navar** (65%).

Visitors living in the Republic of Ireland were more likely to be recorded at **Florence Court** (9%), and **Lough Navar** (13%), while **Glenariff** recorded the highest proportion of visitors from mainland UK countries (16%). **Glenariff** was also the forest where the highest proportion of international visitors was recorded, with 11% of visitors at this site from a European country and a further 9% from further afield.

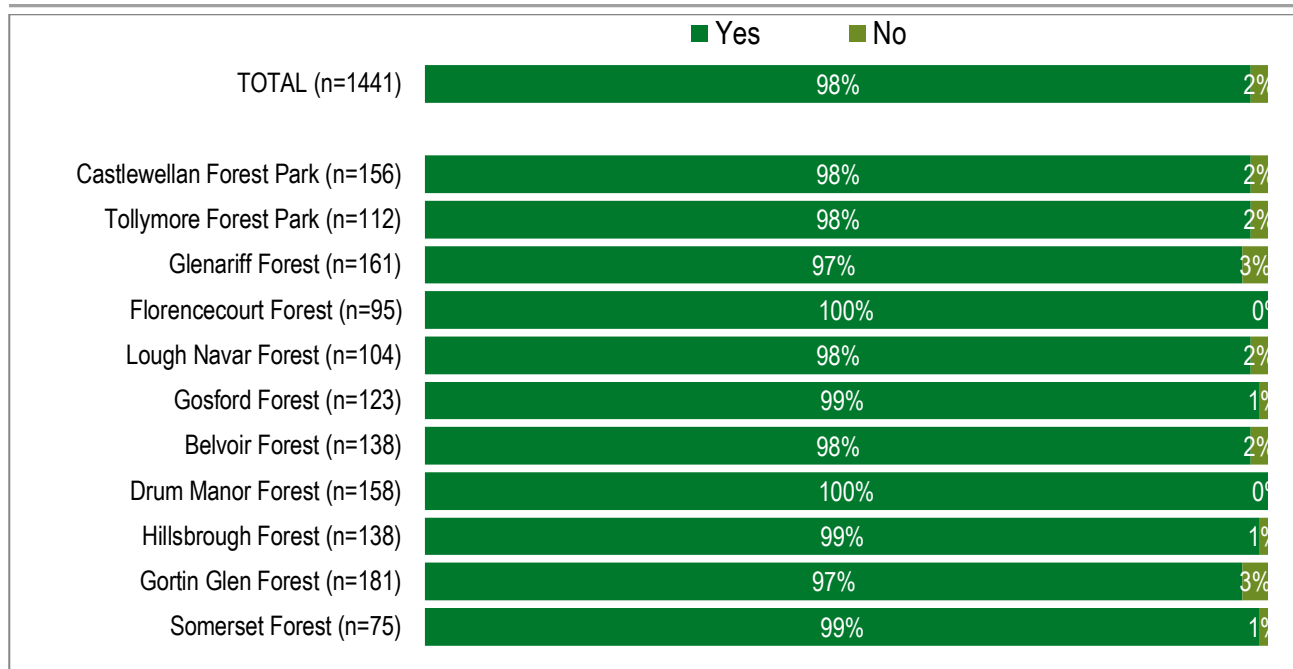
TABLE4 – VISITOR PROFILE – COUNTRY OF RESIDENCE ( % )

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
<b>Northern Ireland</b>	94%	74%	59%	76%	65%	95%	96%	94%	97%	94%	100%	89%
<b>Republic of Ireland</b>	1%	6%	4%	9%	13%	2%	1%	2%	0%	2%	0%	2%
<b>Other UK</b>	3%	7%	16%	12%	7%	3%	2%	3%	2%	2%	0%	5%
<b>Europe</b>	0%	6%	11%	1%	8%	0%	0%	0%	0%	1%	0%	2%
<b>Other international</b>	2%	7%	9%	2%	7%	0%	1%	1%	1%	1%	0%	2%
<b>BASE</b>	n=156	n=112	n=161	n=95	n=104	n=123	n=138	n=158	n=138	n=181	n=75	n=1441

## 4.5 Car ownership

As shown in Figure 3 below, irrespective of the means of transport used to travel to the forest visited (see section 5.4), the vast majority of visitors owned a car (98%).

FIGURE 3 – VISITOR PROFILE – CAR OWNERSHIP (%)



## 4.6 Working status

Across all forests surveyed, the largest proportion of visitors were in paid employment, with 53% employed full-time, 11% on a part-time basis and a small proportion (3%) self-employed. Around a quarter were retired (27%), while small proportions were in full-time education (2%), were unemployed (3%) or not working for other reasons such as caring responsibilities or health reasons (2%).

TABLE 5 – VISITOR PROFILE – WORKING STATUS (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
Working full-time (30+ hrs)	<b>63</b>	65	59	41	55	44	49	59	43	56	41	<b>53</b>
Retired	24	21	19	38	16	28	32	20	38	5	41	27
Working part-time (<30 hrs)	<b>4</b>	5	9	14	20	<b>16</b>	13	8	11	21	8	11
Self-employed	1	4	6	3	3	2	1	3	2	9	1	3
Unemployed	4	1	2	1		2	4	3	2	3	3	3
Full-time education	2	4	2		1	2	1	4	2	2	4	<b>2</b>
Other not working	2	1	2	2	3	2	0	2	1	3	1	2
<b>BASE</b>	n=156	n=112	n=161	n=95	n=104	n=123	n=138	n=158	n=138	n=181	n=75	n=1441

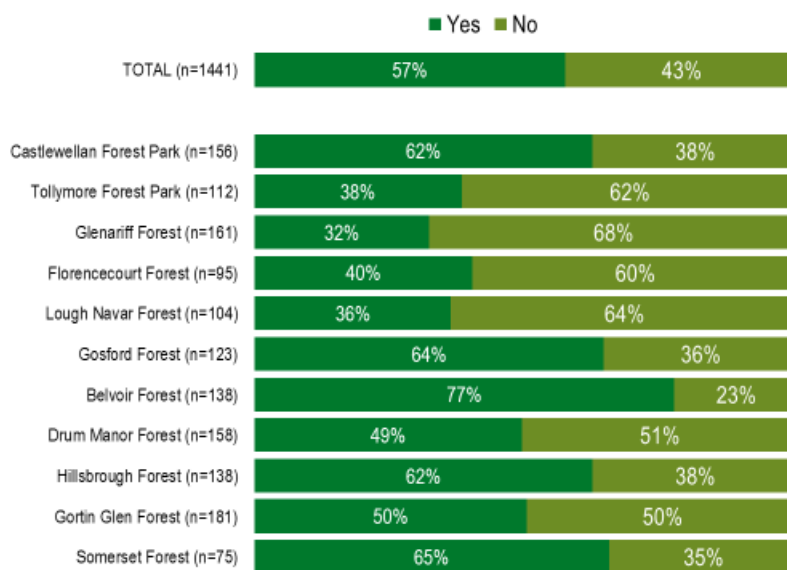
As with other profile characteristics, there was a fair amount of variation between the forests surveyed. Almost 4 in 5 visitors at **Lough Navar** were in paid employment (78%). The highest proportions of retired visitors were recorded at **Somerset** (41%), **Hillsborough** (38%), and **Florence Court** (38%).

## 4.7 Dog ownership

Across all sites surveyed, there was approaching 3 in 5 of visitors (57%) who owned a dog, which represents a notable and statistically significant increase across the sampled forest parks. However, as with other visitor characteristics, there was considerable variation between individual forest sites.

The highest proportion of dog owners was recorded at **Belvoir** where 77% of visitors indicated that they owned a dog. Conversely, 32% of those interviewed at **Glenariff** had a dog.

FIGURE 4 – VISITOR PROFILE – DOG OWNERSHIP (%)





## 5. Visit characteristics

### 5.1 Frequency of visits

Overall, 87% of visitors had been to the forest they were interviewed at before. This varied across the forests, from 54% at **Glenariff** to 99% at **Somerset**.

TABLE 6 – REPEAT VISITS BY FOREST (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Yes</b>	93	<b>76</b>	<b>54</b>	67	<b>70</b>	91	94	<b>89</b>	<b>98</b>	<b>87</b>	99	87
<b>No</b>	7	<b>24</b>	<b>46</b>	33	<b>30</b>	9	6	<b>11</b>	<b>2</b>	<b>13</b>	1	<b>13</b>
<b>BASE</b>	<b>156</b>	<b>112</b>	<b>161</b>	<b>95</b>	<b>104</b>	<b>123</b>	<b>138</b>	<b>158</b>	<b>138</b>	<b>181</b>	<b>75</b>	<b>1441</b>

For those who had visited the forest before, on average 50% frequented that forest at least once a week in the spring and summer, and roughly at the same frequency in the winter and autumn (48%). In spring and summer more than half of visitors to **Hillsborough, Gosford, Belvoir,** and **Somerset** visited at least once a week.

TABLE 7 – FREQUENCY OF VISIT IN SPRING/SUMMER – REPEAT VISITORS (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Every day</b>	<b>3</b>	9		9	1	11	26	9	16	4	23	<b>12</b>
<b>2-6 times per week</b>	24	13	8	16	4	<b>38</b>	35	23	23	19	51	<b>26</b>
<b>Once a week</b>	12	6	7	11	8	14	10	15	17	22	9	<b>12</b>
<b>AT LEAST ONCE A WEEK</b>	<b>39</b>	28	15	<b>36</b>	13	<b>63</b>	71	47	56	45	83	<b>50</b>
<b>Several times a month</b>	11	16	10	8	8	13	8	19	13	21	11	<b>12</b>

<b>About once a month</b>	19	28	10	9	<b>5</b>	<b>8</b>	5	14	14	18	4	13
<b>Less often</b>	<b>32</b>	26	63	<b>47</b>	<b>71</b>	<b>14</b>	15	19	17	15	1	23
<b>BASE</b>	<b>145</b>	<b>85</b>	<b>87</b>	<b>64</b>	<b>73</b>	<b>112</b>	<b>130</b>	<b>141</b>	<b>135</b>	<b>158</b>	<b>74</b>	<b>1204</b>

The same is true of **Gosford, Belvoir, Hillsborough** and **Somerset** in the Autumn and Winter season also as can be seen below in table 8.

TABLE 8 – FREQUENCY OF VISIT IN AUTUMN/WINTER – REPEAT VISITORS (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Every day</b>	<b>1</b>	6		9	1	<b>10</b>	22	9	12	3	23	<b>10</b>
<b>2-6 times per week</b>	24	15	5	<b>9</b>	1	<b>30</b>	32	19	24	13	50	<b>24</b>
<b>Once a week</b>	10	4	<b>6</b>	9	4	15	12	13	15	18	12	12
<b>AT LEAST ONCE A WEEK</b>	<b>35</b>	25	11	<b>27</b>	6	<b>55</b>	66	41	51	34	85	46
<b>Several times a month</b>	10	11	7	<b>5</b>	8	9	9	9	8	13	9	9
<b>About once a month</b>	16	<b>22</b>	11	14	8	11	9	15	13	23	4	<b>13</b>
<b>Less often</b>	39	<b>41</b>	64	<b>52</b>	74	<b>23</b>	15	35	28	30	1	31
<b>BASE</b>	<b>145</b>	<b>85</b>	<b>87</b>	<b>64</b>	<b>73</b>	<b>112</b>	<b>130</b>	<b>141</b>	<b>135</b>	<b>158</b>	<b>74</b>	<b>1204</b>

FIGURE 5–DISTRIBUTION OF VISITS BY FREQUENCY OF VISIT TAKING (% OF VISITS)

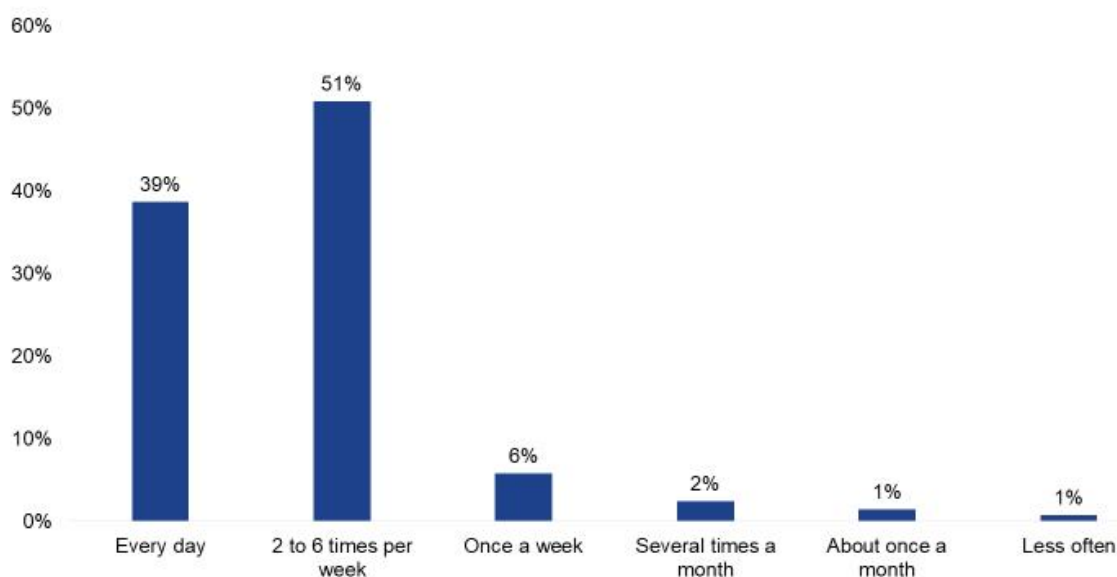


Figure 5 illustrates the high proportion of regular visits (by those visiting at least once per week) that contribute to the overall total of annual visits.

## 5.2 Activities undertaken on visits

Almost two thirds of visitors (65%) took a walk as part of their forest visit while 2 in every 5 visitors (41%) took a dog for a walk. 1 in 10 visits (12%) included looking at wildlife – a similar proportion (11%) included a picnic.

Table 9 illustrates variations in the activities undertaken by forest. Key variations include:

- *Walking* was far and away the most popular activity for visitors (65%) to all forests except Somerset and Belvoir at which dog walking is the most prevalent activity. That said walking remains a notable presence in repertoire of activities at these two forests.
- *Dog walking* was much less popular at **Lough Navar**(11%) and **Glenariff** (15%).
- *Watching wildlife* was part of trips in 1 in 10 cases (12%), most notably at Hillsborough (22%) and Glenariff (24%).
- *Picnics* – visitors to **Tollymore** were most likely to have included a picnic (35%), followed by **Lough Navar (21%)**. By contrast, only 2% of visitors to **Belvoir** had a picnic.
- *Seeing something of interest in the forest* – overall 1 in 20 visitors (6%) said they had seen something in the woodland of interest. Visitors to **Glenariff** were most likely to state they saw something of interest in the forest, where the waterfalls were a big draw for visitors.

TABLE 9 – ACTIVITIES UNDERTAKEN ON VISITS BY FOREST (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Went for a walk</b>	62	80	89	74	60	67	36	72	66	77	56	65
<b>Walked a dog\ dogs</b>	33	29	15	20	11	44	75	30	45	33	57	41
<b>Watching wildlife</b>	1	16	24	5	10	8	12	20	22	4	0	12
<b>Had a picnic</b>	12	35	19	2	21	14	2	9	3	6	3	11
<b>Saw something in the woodland</b>	3	13	21	9	13	7	2	8	1	4	1	6
<b>Running\jogging</b>	8	4	1	1	5	2	6	9	4	4	8	5
<b>Visited a heritage site</b>	3	6	4	33	16	2	0	3	1	1	0	4
<b>Visit kids area or let kids play</b>	1	1	0	2	0	11	0	15	0	31	0	4
<b>Cycling</b>	3	2	1	1	3	10	1	3	0	1	1	2
<b>Participated in an event\organised activity</b>	4	7	1	7	2	0	1	1	0	0	0	2
<b>Camping in the forest</b>	6	0	2	0	3	1	1	1	0	0	1	2
<b>Mountain biking</b>	3	1	2	1	0	7	0	1	0	0	1	2
<b>Visited cafe</b>	0	2	4	14	0		1	1	1	0	1	1
<b>Photography</b>	1	0	3	1	0	1	1	1	1	1	1	1
<b>Fishing</b>	4	0	0	0	4	0	0	0	1	0	0	1
<b>Play sports</b>	1	1	0	0	0	0	0	0	1	1	0	0

<b>Volunteered</b>	0	1	1	0	1	0	1	0	0	0	0	0
<b>Viewpoint or sightseeing</b>	0	0	0	1	16	0	0	0	0	0	0	0
<b>Relaxation or Meditation</b>	0	1	0	0	1	0	0	1	1	0	0	0
<b>BASE</b>	<b>156</b>	<b>112</b>	<b>161</b>	<b>95</b>	<b>104</b>	<b>123</b>	<b>138</b>	<b>158</b>	<b>138</b>	<b>181</b>	<b>75</b>	<b>1441</b>

As shown in Table 10 below, the most common reason for visiting the surveyed forests was for health or exercise, in 50% of cases. The next most popular reasons were walking the dog (39%), spending time with family and friends (29%) and to relax (23%). Visitors to **Lough Navar** were least likely to be in the forest for health and exercise (26%), whereas those at **Somerset** and **Hillsborough** were more likely to be there for health & exercise (69% / 63% respectively).

TABLE 10 – REASONS FOR VISITING (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Health\ exercise</b>	37	46	37	33	26	58	53	59	63	54	69	50
<b>To exercise a dog\ dogs</b>	29	29	12	17	9	41	76	28	46	30	57	39
<b>Spending some time with friends and family</b>	34	32	33	23	26	42	12	42	25	38	20	29
<b>To relax\ unwind\ de-stress</b>	13	21	30	16	24	25	33	29	30	16	5	23
<b>Been before and wanted to come back</b>	5	14	16	4	18	18	17	18	12	7	49	15
<b>Wanted to visit this forest\ woodland</b>	3	30	34	21	35	13	14	13	7	9	1	14
<b>So children could play\ get exercise</b>	3	11	3	7	3	11	4	16	6	15	3	7
<b>Never been before and wanted to come</b>	1	5	21	14	8	6	4	8	1	2	0	5
<b>Just passing by</b>	12	5	8	7	13	3	1	2	2	1	0	5
<b>Other</b>	5	18	16	25	13	9	8	3	4	3	3	8
<b>BASE</b>	156	112	161	95	104	123	138	158	138	181	75	1441

TABLE 11a – MAIN REASONS FOR VISIT (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Health\ exercise</b>	25	21	16	15	15	22	12	25	34	28	28	23

<b>To exercise a dog\ dogs</b>	24	20	5	14	4	28	67	22	36	23	53	31
<b>Spending some time with friends and family</b>	24	19	14	13	14	28	6	23	16	29	8	17
<b>To relax\ unwind\ de-stress</b>	2	0	9	4	2	2	6	6	8	2	1	4
<b>Been before and wanted to come back</b>	3	4	8	3	11	4	3	2	2	2	3	4
<b>Wanted to visit this forest\ woodland</b>	10	3	7	4	11	2	0	1	1	1	0	3
<b>So children could play\ get exercise</b>	1	9	17	6	13	1	1	3	0	2	0	4
<b>Never been before and wanted to come</b>	1	2	0	3	1	4	1	10	1	9	0	2
<b>Just passing by</b>	1	4	15	7	6	2	1	3	0	2	0	3
<b>Other</b>	9	19	10	30	23	5	5	5	2	3	6	8
<b>BASE</b>	156	112	161	95	104	123	138	158	138	181	75	1441

TABLE 11b FACILITIES VISITED/INTEND TO VISIT (%)

The main facility used at all forests, except **Lough Navar**, was the walking trails (94%). At **Lough Navar** the most used facility was the viewpoints (75%). The viewpoints were also popular at **Glenariff** (43%). Water features were commonly visited at **Glenariff** (66%), and café/tearooms were most prevalently visited at **Florence Court** (51%).

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	TOTAL
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Walking trails</b>	93	96	85	98	52	87	99	97	98	99	93	94
<b>Cycle trails</b>	6	1	1		6	16	1	3		2	8	4
<b>Viewpoints</b>	3	7	43	12	75	3	5	7	4	4	1	10
<b>Camping\caravanning facilities</b>	5	0	8	2	4	2	0	1	0	0	3	2
<b>Gardens\peace maze</b>	25	-	-	-	-	-	-	-	-	-	-	4
<b>Pony trekking</b>	-	-	-	-	-	-	-	-	-	1	-	0
<b>Fishing</b>	5	-	-	-	3	-	-	-	1	-	-	1
<b>Water features - lough, waterfalls, rivers</b>	5	12	66	16	15	10	24	23	19	5	-	19
<b>Cafe\ tearooms\ restaurant</b>	9	-	36	51	-	17	2	2	1	0	-	9
<b>Toilets</b>	13	20	25	33	-	33	-	29	1	1	-	13
<b>BASE</b>	156	112	161	95	104	123	138	158	138	181	75	1441

### 5.3 Length of time spent on visits to forests

4 in every 5 visits lasted less than three hours while fewer than one in twenty visits lasted more than five hours. The forests split into two categories in terms of time people spend, broadly speaking 'shorter visits' versus 'longer visits'.

**Somerset** had no incidences of visits longer than 3 hours. **Gosford** had just 2% of longer visits over three hours. **Belvoir**, **Drum Manor Hillsborough** and **Gortin Glen** roughly had 1 in every 20 visits being in excess of three hours.

Contrastingly, **Castlewellan**, **Tollymore**, **Lough Navar**, **Florence Court** and **Glenariff**, have a higher proportion (25% or more) of trips lasting over three hours, with Tollymore the high-water mark for longer visits where in excess of 3 in 5 visits are 3+ hours in duration.

TABLE 12 – LENGTH OF VISITS BY FOREST (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUMMANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
<b>1 hour or less</b>	55	2	18	30	23	93	77	84	63	71	79	56
<b>1.01 hr – 3 hrs</b>	20	35	35	35	29	5	18	12	33	22	21	25
<b>3.01 to 5 hours</b>	16	45	38	23	35	2	4	4	3	6	0	15
<b>More than 5 hours</b>	9	18	9	12	14	0	1	0	1	1	0	4
<b>BASE</b>	<b>156</b>	<b>112</b>	<b>161</b>	<b>95</b>	<b>104</b>	<b>123</b>	<b>138</b>	<b>158</b>	<b>138</b>	<b>181</b>	<b>75</b>	<b>1441</b>

## 5.4 Travel to forests

Overall, 7 in 10 (70%) of visitors were resident in the same council area as the forest which they were visiting. **Somerset** (96%), **Belvoir** (91%) and **Drum Manor** (87%) had a particularly high proportion of visitors from nearby.

TABLE 13 – NI RESIDENTS BY COUNCIL AREA OF RESIDENCE BY FOREST (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Belfast</b>	7	8	5	5	4	2	<b>91</b>	1	7	1	-	18
<b>Causeway Coast &amp; Glens</b>	1	1	4	1	1	-	-	1	-	-	<b>96</b>	6
<b>Newry, Mourne &amp; Down</b>	<b>74</b>	<b>61</b>	1	1	-	20	2	-	4	-	-	21
<b>Lisburn &amp; Castlereagh</b>	-	8	1	5	-	3	1	1	<b>63</b>	-	-	13
<b>Mid &amp; East Antrim</b>	-	2	71	3	2	-	1	1	-	1	-	8
<b>Antrim &amp; N'abbey</b>	4	3	8	1	3	2	1	2	1	2	1	2
<b>Mid Ulster</b>	-	-	3	1	2	1	1	<b>87</b>	1	3	-	5
<b>North Down &amp; Ards</b>	6	4	4	2	5	-	3	1	4	-	-	3
<b>Armagh, Banbridge &amp; Craigavon</b>	8	13	2	2	2	<b>72</b>	1	1	21	1	-	14
<b>Fermanagh &amp; Omagh</b>	-	-	-	<b>77</b>	<b>78</b>	1	-	6	-	<b>52</b>	-	8
<b>Derry &amp; Strabane</b>	-	-	1	1	4	-	-	1	-	41	3	2
<b>BASE</b>	214	106	83	43*	19*	136	205	67	252	67	86	1282

9 in 10 visits (93%) to the forests surveyed were taken by car, with the rest a mix of public transport and travel by foot. Forests with a higher proportion of visitors travelling by means other than motor vehicle are **Tollymore** (19%) and **Lough Navar** (17%).

TABLE 14 – MAIN MODE OF TRANSPORT USED ON VISITS BY FOREST (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM ANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Car</b>	93	81	94	97	83	96	92	97	94	97	93	93
<b>Train</b>	0	0	0	0	0	0	0	0	0	0	0	0
<b>Bus</b>	2	9	0	0	0	0	0	1	1	1	0	1
<b>Motorbike</b>	0	0	0	0	3	0	0	1	1	0	0	0
<b>Bicycle</b>	0	2	0	0	3	1	1	0	0	0	0	0
<b>On foot</b>	3	4	1	0	6	2	6	0	4	2	7	3
<b>Other</b>	2	4	5	3	6	1	1	2	1	1	0	2
<b>Base</b>	156	112	161	95	104	123	138	158	138	181	75	1441



## 5.5 Expenditure

### Money spent during overall forest visit

All visitors were asked to specify how much money they had spent or would spend on a number of items on the day of their forest visit, including money spent outside of the forest.

As can be seen in Table 15, overall, across the 11 forests, 80% of visitors had spent money during their visits while 20% did not spend any money. The largest proportions had spent money on transport, including fuel (64%) and/or food and drink (45%).

Visitors to **Glenariff, Florence Court, Lough Navar** and **Somerset** were the most likely to have spent any money on the day of their visits with over 90% having spent money on something, other than car parking. At **Glenariff** visitors were likely to have purchased a range of different items with 73% having spent money on food and drink.

The lowest incidence of spending was recorded at Gortin Glen, with only 3 in 10 respondents spending anything. At Somerset, although it has a large proportion spending something, it's almost exclusive related to transport, leaving virtually no other spend on anything else.

TABLE 15 – ITEMS PURCHASED ON DAY OF VISIT (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUMMANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Spent (any)</b>	74	73	99	97	94	85	78	79	80	30	92	<b>80</b>
<b>Transport</b>	46	61	85	83	83	67	61	68	67	24	91	<b>64</b>
<b>Food &amp; drink</b>	40	54	73	72	59	53	41	44	43	22	0	<b>45</b>
<b>Accommodation</b>	21	18	35	48	49	10	0	4	0	9	0	<b>13</b>
<b>Admission fees</b>	51	50	54	25	4	27	4	3	6	1	1	<b>24</b>
<b>Shopping (non-routine)</b>	5	6	12	26	6	2	7	4	8	7	0	<b>7</b>
<b>Other</b>	1	3	2	2	1	2	1	1	1	1	0	<b>1</b>
<b>Equipment</b>	0	4	0	0	1	1	0	0	0	1	1	<b>1</b>
<b>Spent nothing</b>	26	27	1	3	6	15	22	21	20	70	8	<b>20</b>
<b>BASE</b>	<b>156</b>	<b>112</b>	<b>161</b>	<b>95</b>	<b>104</b>	<b>123</b>	<b>138</b>	<b>158</b>	<b>138</b>	<b>181</b>	<b>75</b>	<b>1441</b>

As shown in Figure 6, average spend per visit was £25 (24.60) when including expenditure on overnight accommodation or £17 excluding accommodation. This includes attributable spend on the day of the visit plus any spend incurred at the forest park.

Average spend varies between forests, with the highest average amounts spent by visitors to **Tollymore** (£52 including accommodation) while the lowest was spent by visitors to **Somerset** (£2 including accommodation).

**FIGURE 6 – AVERAGE EXPENDITURE ON DAY OF VISIT INCLUDING AND EXCLUDING ACCOMMODATION SPEND ( BASED ON ALL RESPONDENTS I.E. INCLUDING THOSE WHO SPENT NOTHING)  
FORESTS RANKED FROM HIGHEST AVERAGE SPEND INCLUDING ACCOMMODATION TO LOWEST**

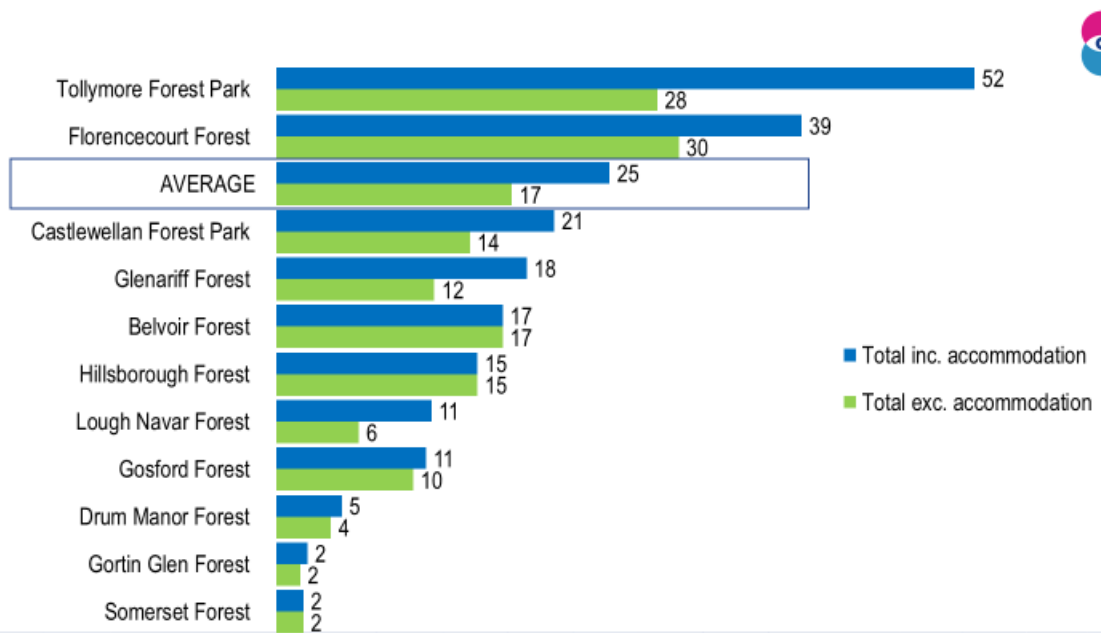


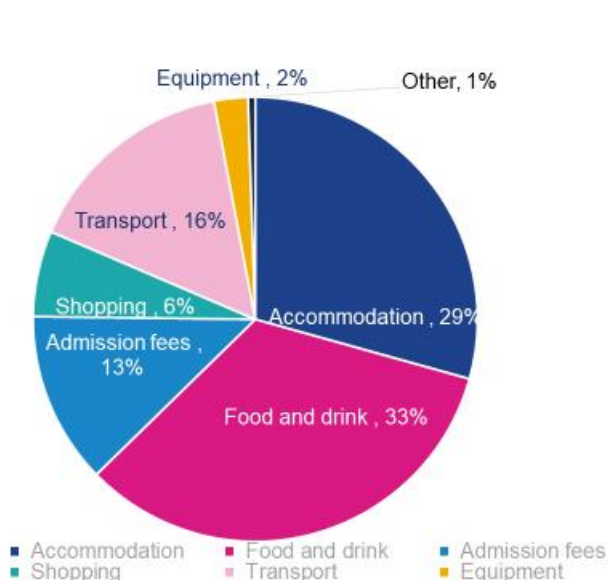
Table 16 provides further details on average spend on different items, illustrating the much higher average spend on food and drink by visitors to **Tollymore**, admission fees by those at **Florence Court** and shopping by those at **Belvoir**.

**TABLE 16 – AVERAGE EXPENDITURE ON DAY OF VISIT BY CATEGORY AND FOREST (£, BASED ON ALL RESPONDENTS I.E. INCLUDING THOSE WHO SPENT NOTHING)**

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	£	£	£	£	£	£	£	£	£	£	£	£
Food & drink	5.84	14.78	6.61	7.08	3.24	4.72	9.00	1.96	7.65	0.71	0.00	8.21
Transport	2.98	4.98	3.01	3.35	2.04	2.55	2.98	1.72	4.05	0.50	1.92	3.83
Shopping (non-routine)	0.66	1.20	0.66	2.37	0.65	1.46	4.16	0.26	1.84	0.50	0.00	1.54
Admission fees	4.76	2.80	1.29	16.23	0.11	1.26	0.45	0.09	1.25	0.01	0.06	3.08
Equipment	0.00	4.28	0.00	0.00	0.04	0.06	0.00	0.00	0.00	0.02	0.01	0.61
Other	0.03	0.08	0.11	0.69	0.01	0.05	0.11	0.02	0.06	0.01	0.00	0.13
<b>Total exc. accommodation</b>	<b>14.28</b>	<b>28.12</b>	<b>11.67</b>	<b>29.71</b>	<b>6.09</b>	<b>10.10</b>	<b>16.71</b>	<b>4.04</b>	<b>14.85</b>	<b>1.75</b>	<b>1.99</b>	<b>17.39</b>
Accommodation	6.24	23.43	6.80	9.08	5.35	0.95	0.00	0.78	0.00	0.55	0.00	7.21
<b>Total inc. accommodation</b>	<b>20.52</b>	<b>51.56</b>	<b>18.47</b>	<b>38.79</b>	<b>11.44</b>	<b>11.05</b>	<b>16.71</b>	<b>4.83</b>	<b>14.85</b>	<b>2.30</b>	<b>1.99</b>	<b>24.60</b>
<b>BASE</b>	<b>156</b>	<b>112</b>	<b>161</b>	<b>95</b>	<b>104</b>	<b>123</b>	<b>138</b>	<b>158</b>	<b>138</b>	<b>181</b>	<b>75</b>	<b>1441</b>

As shown in Figure 7 around 1 in every 7 £ spent was incurred on transport (16%), and more than a third was spent on food and drink (33%) and approaching 3 in 10 on accommodation (29%). That leaves the remainder to be split between admission fees (13%), shopping (6%) and equipment (2%).

FIGURE 7 – DISTRIBUTION OF EXPENDITURE BY VISITORS



Cognisense

Total average spend = £25

19

From Table 17 it can be seen that on average, visitors to **Tollymore, Castlewellan** and **Florence Court** spend more on accommodation, which is driven by the type of accommodation visitors to those forests used.

11% of visitors to the forests surveyed were on an overnight trip, and 8% paid for accommodation. The average amount spent by those who paid for accommodation was £99 per party.

## Money spent in the forest

All visitors were also asked to specify how much money they had spent or would spend on a number of items in the forest on the day of their visit.

As shown in Table 17 below, the average spend within the 11 forests surveyed was £3.98, the majority of which is food and drink (£1.45) and admission fees (£1.05). The highest average spends within the forest were at **Florence Court** and **Tollymore**.

**TABLE 17 – AVERAGE EXPENDITURE ON DAY OF VISIT WITHIN FOREST BY CATEGORY AND FOREST (£, BASED ON ALL RESPONDENTS I.E. INCLUDING THOSE WHO SPENT NOTHING)**

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
Food & drink	0.91	4.55	1.34	2.11	0.48	0.96	0.25	0.08	0.12	0.04	0.00	1.45
Shopping (non-routine)	0.07	0.35	0.16	1.09	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.20
Admission fees	2.20	0.74	0.47	5.51	0.02	0.58	0.00	0.00	0.00	0.00	0.00	1.05
Equipment	0.00	2.12	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.01	0.00	0.30
Other	0.00	0.00	0.01	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02
<b>Total exc. accommodation</b>	3.19	7.76	1.98	8.88	0.59	1.57	0.25	0.08	0.12	0.05	0.00	3.02
Accommodation	2.32	2.70	0.40	1.21	0.61	0.19	0.00	0.00	0.00	0.02	0.00	0.95
<b>Total inc. accommodation</b>	5.51	10.46	2.39	10.09	1.20	1.75	0.25	0.08	0.12	0.06	0.00	3.98
<b>BASE</b>	<b>156</b>	<b>112</b>	<b>161</b>	<b>95</b>	<b>104</b>	<b>123</b>	<b>138</b>	<b>158</b>	<b>138</b>	<b>181</b>	<b>75</b>	1441

All visitors were asked to specify how much money they had spent or would spend on a number of items in the forest on the day of their visit.

Overall, across the 11 forests, 31% of visitors had spent money within the forest during their visits. 17% had paid for food and drink, and 20% for admission fees.

A higher proportion of visitors to **Florence Court (58%)**, **Glenariff (52%)** and **Castlewellan (50%)** had spent money in the forest on the day of their visits, than in other forests. There was minimal or no spend at **Belvoir (4%)**, **Hillsborough (3%)**, **Gortin Glen (5%)** and **Somerset (0%)**.

TABLE 18 – TOTAL EXPENDITURE IN FOREST - ALL VISITORS (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Spent (any)</b>	50	40	52	58	28	39	4	9	3	5	0	31
<b>Food &amp; drink</b>	15	27	45	53	22	35	4	9	3	3	0	17
<b>Admission fees</b>	50	38	48	19	1	24	0	0	0	0	0	20
<b>Accommodation</b>	10	7	9	28	12	5	0	0	0	1	0	5
<b>Shopping (non-routine)</b>	1	4	5	21	2	0	0	0	0	0	0	2
<b>Other</b>	0	0	1	1	0	0	0	0	0	0	0	0
<b>Equipment</b>	0	3	0	0	0	1	0	0	0	1	0	0
<b>Spent nothing</b>	50	60	48	42	72	61	96	91	97	95	100	69
<b>BASE</b>	<b>156</b>	<b>112</b>	<b>161</b>	<b>95</b>	<b>104</b>	<b>123</b>	<b>138</b>	<b>158</b>	<b>138</b>	<b>181</b>	<b>75</b>	<b>1441</b>

## Estimating total spend during trips involving forest visits

The estimated total annual spend during trips that involve visiting a publicly accessible Forest Service location (including any amounts spent on accommodation) is £172 million.

The following calculations have been used:

- A:** Total annual visits to forests = 8.97 million
- B:** Proportion of these visitors who are adults = 78%
- C:** Average spend per person per day amongst this group = £24.60
- D:** Estimated total spend per year during trips by people visiting a forest

$(A \times B \times C) = \text{£172.2 million}$

## Estimating total spend attributable to forests

The total amount spent by applying information on average levels of expenditure per person per day to data relating to where visitors travel from and the influence of forests on decisions to visit, it is possible to estimate total spend by visitors whose decisions to go to the area were affected by the presence of the forest to visit. This provides an indication of how much money is spent in local authorities because of the presence of the forest and its facilities.

The following calculations have been used:

- A:** Proportion of visits taken by people who stated that the forest and its facilities were their **only reason** to visit the area. Excluding people who live locally (i.e. within same local authority) whose expenditure in the area is likely to have occurred regardless of the presence of the forest = 13%
- B:** Total annual visits to forests = 8.97 million
- C:** Total visits taken due to forests and facilities  $(A \times B) = 1.1$  million
- D:** Proportion of these visitors who are adults = 78%
- E:** Number of adult visits  $(C \times D) = 918,585$
- F:** Average spend per person per day amongst this group = £41.05
- G:** Estimated total spend per year by people who visited local authority due to forests and facilities  $(E \times F) = \text{£37.7 million}$

This calculation suggests that visitors who were influenced to take their visit to an area due to the forest and its facilities spent approximately £37.7 million in 2019. This expenditure was made during the day of the forest visit and included overnight accommodation, food and drink, transport and non-routine shopping.

## 5.6 Car parking

Across the seven forests which charge for parking, 40% of visitors who travelled by car or motorbike claimed to have bought a day ticket, and 26% claimed to have a season ticket. Of those travelling by car or motorbike, the least likely to pay for parking were those visiting **Gortin Glen** (99%) and **Drum Manor** (95%). Note that this does not necessarily means these visitors parked in the forest without paying. In many instances, visitors (particularly those with local knowledge) have parked near to the forest and walked in, possibly to avoid the parking charges.

TABLE 19 – PARKING: ALL WHO TRAVELLED BY CAR/MOTORCYCLE (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	GOSFORD	DRUM MANOR	GORTIN GLEN	TOTAL
	%	%	%	%	%	%	%	%
<b>Bought day ticket</b>	54	53	61	23	32	1	0	40
<b>Season ticket</b>	20	43	5	35	61	4	0	26
<b>Did not pay</b>	24	4	28	42	7	95	99	33
<b>BASE</b>	<b>145</b>	<b>91</b>	<b>152</b>	<b>92</b>	<b>118</b>	<b>154</b>	<b>175</b>	<b>927</b>

## 5.7 Visiting forests while on overnight trips

11% of visitors surveyed were on a holiday or short break. As shown in Table 20, the average length of holiday amongst these visitors was 7 nights with 64% of overnight visitors on trips of 7 nights or shorter. Visitors who were on a holiday or short break were most likely to stay overnight at self-catering accommodation (21%)

TABLE 20 – NIGHTS AWAY AND ACCOMMODATION TYPES USED BY THOSE ON OVERNIGHT TRIPS (%)

Number of nights	Total	Accommodation types	Total
1	3	Self-catered house or flat	21
2	16	Hotel	19
3	18	Staying with friends or family	16
4	9	Guesthouse\B&B	10
5	6	Camping in this forest park	8
6	1	Caravan staying in this forest park	7
7	11	Caravan staying somewhere else	6
8	5	Camping elsewhere	4
9	1	Campervan	4
10	5	Hostel	2
11	1	Second home	1
12	2	Boat	0
13	0		
14	5		
15+	17		
<b>BASE</b>	<b>177</b>	<b>BASE</b>	<b>177</b>



## 5.8 Rating of Forests

Overall 83% of visitors rated the forest they were visiting as excellent or very good while only 1% rating them fair or poor.

The highest rating was obtained by **Florence Court** (95%), although **Gosford and Lough Navar** received similarly high ratings (94% and 93% respectively).

TABLE 21 – OVERALL RATING (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUMMANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Excellent</b>	24	30	55	71	59	46	41	52	25	45	31	38
<b>Very Good</b>	54	52	37	24	34	48	43	37	46	39	48	45
<b>EXCELLENT/VERY GOOD</b>	<b>78</b>	<b>82</b>	<b>92</b>	<b>95</b>	<b>93</b>	<b>94</b>	<b>84</b>	<b>89</b>	<b>71</b>	<b>84</b>	<b>79</b>	<b>83</b>
<b>Good</b>	21	17	7	4	6	4	16	9	23	14	19	15
<b>Fair</b>	1	0	1	1	0	1	0	0	4	0	3	1
<b>Poor</b>	0	0	0	0	0	1	0	1	1	0	0	0
<b>BASE</b>	156	112	161	95	104	123	138	158	138	181	75	1441

On average 94% of visitors would probably or definitely recommend the forest where they were interviewed to a friend or relative. **Florence Court** received the highest likelihood to recommend, at 100%, and **Castlewellan** had the lowest, albeit still representing strong endorsement at 84%.

TABLE 22 – RECOMMENDATION (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM ANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Definitely</b>	37	71	84	92	92	76	84	88	71	88	73	72
<b>Probably</b>	47	26	14	8	6	20	12	9	22	8	20	22
<b>DEFINITELY/PROBABLY</b>	<b>84</b>	<b>97</b>	<b>98</b>	<b>100</b>	<b>98</b>	<b>96</b>	<b>96</b>	<b>97</b>	<b>93</b>	<b>96</b>	<b>93</b>	<b>94</b>
<b>Fairly likely</b>	15	4	2	0	0	2	4	3	6	3	7	5
<b>Probably won't</b>	0	0	0	0	2	1	1	1	1	1	0	1
<b>Definitely won't</b>	0	0	0	0	0	1	0	0	0	0	0	0
<b>BASE</b>	156	112	161	95	104	123	138	158	138	181	75	1441

Overall, 2 in 5 visitors (39%) felt that the quality of the surveyed forests had not changed over the past 3 years, while almost half considered there to have been an improvement (46%) felt that the site had improved. This leaves just 1 in 10 who had a worse experience compared with 3 years ago, giving a net improvement score of 36 percentage points. The forests perceived to have improved the most were **Gortin Glen** (85%), **Gosford** (75%) and **Florence Court** (67%). **Belvoir** and **Tollymore** are the forests which were mentioned most as having deteriorated, with 19% and 20% respectively thinking their experience was worse than three years ago.

TABLE 23 – CHANGE IN QUALITY (%)

	CASTLEWELLA N	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
<b>Much better</b>	3	1	22	50	25	55	6	21	10	55	5	17
<b>Slightly better</b>	32	21	26	17	25	20	25	25	32	30	53	29
<b>BETTER (SUM)</b>	<b>35</b>	<b>22</b>	<b>48</b>	<b>67</b>	<b>50</b>	<b>75</b>	<b>31</b>	<b>46</b>	<b>42</b>	<b>85</b>	<b>58</b>	<b>46</b>
<b>No change</b>	60	49	33	30	41	14	41	43	39	10	36	39
<b>Slightly worse</b>		18	8		7	6	16	6	9	3	3	8
<b>Much worse</b>		2	3			3	3	1	2		1	2
<b>WORSE (SUM)</b>	<b>0</b>	<b>20</b>	<b>11</b>	<b>0</b>	<b>7</b>	<b>9</b>	<b>19</b>	<b>7</b>	<b>11</b>	<b>3</b>	<b>4</b>	<b>10</b>
<b>Don't know</b>	5	8	7	3	3	2	9	4	8	3	1	6
<b>BASE</b>	145	85	87	64	73	112	130	141	135	158	74	1204

The main reasons given for improvements were better walking trails (49%), good maintenance (36%) and better facilities (30%), with particularly positive figures in **Gosford** and **Gortin Glen**. At **Gosford** the cycling trails were also mentioned by 38% of visitors who said they had seen an improvement.

TABLE 24 – WHAT HAS CHANGED FOR BETTER (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
Better\ more walking trails\paths	22	16	55	23	42	42	65	29	80	28	79	49
Well maintained\looked after	22	26	48	51	47	30	35	45	30	23	74	36
More facilities\facilities have improved	27	11	43	67	28	56	7	29	2	81	2	30
Better\more cycle trails	20	5	7	2	3	38	2	5	0	8	-	11
More to do	25	16	5	12	8	15	0	5	2	9	-	9
Added\ Updated playpark	2	26	2	0	0	25	0	28	2	2	-	8
Less litter\cleaner	12	11	10	5	11	6	2	8	2	1	-	5
Cafe added\improved\good value	10	5	14	7	0	7	5	5	2	0	-	5
Improved foliage\trees\wildlife resources	0	11	2	14	0	0	12	3	7	0	2	4
Feel safer here	4	0	14	2	11	4	2	6	0	1	5	4
Improved signage	0	0	2	2	11	6	0	3	2	1	0	2
Better parking facilities	2	0	0	0	11	0	2	2	2	1	2	1
Higher footfall \ Busier	2	0	0	0	6	4	0	3	0	1	0	1
Car park season tickets introduced\good value	2	0	5	0	0	2	0	0	0	1	-	1
Annual pass price \ entrance fee reduced	0	0	0	0	0	1	0	2	0	0	-	0
Camping facilities improved	0	0	2	0	0	0	0	2	0	0	-	0
Better weather	0	5	0	0	0	0	0	0	0	0	-	0
Added \ Updated picnic area	0	0	0	0	0	0	0	0	0	0	2	0
Don't know	2	0	0	2	0	0	0	3	0	1		1
<b>BASE</b>	<b>75</b>	<b>24*</b>	<b>37*</b>	<b>26*</b>	<b>10*</b>	<b>97</b>	<b>62</b>	<b>29</b>	<b>104</b>	<b>53</b>	<b>49*</b>	<b>567</b>

The main reason given for deterioration relate to a general lack of maintenance (35%), particularly so at **Drum Manor**, with water quality being an issue at **Hillsborough**. However, it is worth noting that the numbers reporting a change for the worse were very small in number, equating to just 6% of the total surveyed (99 out of the 1441 responses).

TABLE 25 – WHAT HAS CHANGED FOR WORSE (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	GORTIN GLEN	Total
	%	%	%	%	%	%	%	%	%	%	%	%
Not well maintained\ looked after	-	18	50	-	20	10	52	80	20	0	67	35
Walking trails\ paths in worse condition	-	24	30	-	20	10	24	10	20	0	33	21
Fewer facilities\ facilities worse	-	41	10	-	20	0	0	20	20	50	33	15
Poor maintenance of foliage and trees	-	0	10	-	0	0	28	10	13	0	33	14
Cut down too many trees	-	6	30	-	20	10	20	0	7	25	0	13
More litter\ dog mess\ untidy	-	6	20	-	0	10	16	0	13	0	33	13
Cafe gone\ expensive\ poor quality	-	59	10	-	0	0	0	0	0	0	0	11
Poor water quality	-			-	0	0	4	10	27	0	0	8
Cycle trails introduced	-	6	10	-	0	40	4	0	0	0	0	7
Too busy	-	6	10	-	20	30	0	0	7	0	0	6
Poor signage	-	12	0	-	0	0	4	0	0	0	0	3
Fewer staff	-	0	0	-	0	0	8	10	0	0	0	3
Have to pay for parking	-	0	10	-	0	10	0	0	0	0	0	2
Lack of available parking	-	0	0	-	0	0	0	0	7	0	0	2
Not enough to do\ less to do	-	0	10	-	0	0	0	0	0	25	0	1
Cycle trails in worse condition	-	0	10	-	0	0	0	0	0	0	0	1
Anti-social behaviour	-	0	0	-	0	0	0	10	0	0	0	0
More wildlife care needed	-	0	0	-	0	0	0	10	0	0	0	0
Do not feel safe here	-	0	0	-	0	0	0	0	0	0	0	0
Don't know	-	12	0	-	20	0	0	0	7	25	0	4
<b>BASE</b>	-	<b>17*</b>	<b>10*</b>	-	<b>5*</b>	<b>10*</b>	<b>25*</b>	<b>10*</b>	<b>15*</b>	<b>4*</b>	<b>3*</b>	<b>99</b>

\* caution small base

In general, the main barriers to visiting these forests relate to distance, although by far the most prevalent response to this question (Q30. Which of the following, if any, stops you from visiting <FOREST> park more often?) is the assertion that 'I visit as much as I want to'. This underscores the strength of the current product, to which there are no major aspects of 'active rejection'.

TABLE 26 – BARRIERS (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
<b>Nothing I visit as much as I want to</b>	70	54	32	55	55	59	65	68	55	71	83	60
<b>I live too far away\visiting on holiday</b>	12	21	42	29	25	6	5	9	8	7	0	13
<b>I do not have enough time to visit more often</b>	9	9	13	9	3	12	3	7	6	9	0	7
<b>There aren't enough facilities at this forest\ forest park</b>	1	5	2	1	8	4	12	6	8	4	5	5
<b>The quality of the facilities is poor\ not good enough</b>	1	1	2	0	2	0	5	4	4	2	4	2
<b>There isn't enough information about this forest\ forest park</b>	0	5	6	0	3	2	3	2	1	1	1	2
<b>Other forest sites offer more than this one</b>	0	4	1	0	2	2	4	6	1	2	0	2
<b>My health or a disability</b>	2	4	3	0	1	2	1	1	1	0	0	2
<b>Parking is too expensive</b>	1	1	7	2	0	3	0	0	1	1	0	2
<b>I feel worried about my safety</b>	0	0	0	0	1	4	5	1	1	1	3	2
<b>Lack of parking\parking not convenient\car parks full</b>	0	0	0	3	0	1	1	1	7	1	0	2
<b>I prefer other forests\ forest parks</b>	1	1	1	1	1	0	1	4	4	2	0	2
<b>There isn't enough to do at this forest\ forest park</b>	1	2	3	1	2	2	0	1	1	2	0	1
<b>Too many children \ too busy</b>	0	1	1	0	1	4	0	0	3	1	0	1
<b>No cafe \ coffee hut</b>	1	2	1	0	1	1	1	1	1	1	0	1
<b>More waste bins needed</b>	0	0	0	0	0	1	2	1	0	0	5	1
<b>Out of control \ off leash dogs</b>	0	1	0	0	0	0	1	1	2	0	0	1
<b>BASE</b>	<b>156</b>	<b>112</b>	<b>161</b>	<b>95</b>	<b>104</b>	<b>123</b>	<b>138</b>	<b>158</b>	<b>138</b>	<b>181</b>	<b>75</b>	<b>1441</b>

In terms of statements that best describe the various forest sites, health activity is the key response (55%), followed by good maintenance (49%), safety (44%), and opportunity to have fun (44%).

TABLE 27 – STATEMENTS BEST DESCRIBE SITE (%)

	CASTLEWELLAN	TOLLYMORE	GLENARIFF	FLORENCE COURT	LOUGH NAVAR	GOSFORD	BELVOIR	DRUM MANOR	HILLSBOROUGH	GORTIN GLEN	SOMERSET	Total
	%	%	%	%	%	%	%	%	%	%	%	%
I can pursue healthy activities here	32	75	54	35	43	54	63	54	57	57	97	55
The forest\ forest park is well maintained	38	38	56	60	59	52	50	72	41	50	72	49
I feel safe here	34	34	36	28	27	34	49	53	57	38	84	44
It's a good place for people to have fun and enjoy themselves	32	52	43	45	37	50	38	56	33	58	81	44
The forest\ forest park is welcoming	42	50	35	44	38	35	36	40	40	30	12	38
It's a good place for people to learn about the natural environment	24	37	42	36	45	30	39	35	33	43	29	34
The forest\ forest park makes this area a nicer place to live	21	17	22	22	36	31	46	28	37	20	15	29
The forest\ forest park has all the facilities I need	31	10	33	32	6	33	12	25	9	17	1	19
The forest\ forest park has good quality facilities	27	7	35	32	11	37	5	25	7	27	0	18
The forest\ forest park helps to build a sense of community	15	7	6	14	11	17	15	11	11	13	4	12
The forest\ forest park helps to bring money into the local area	13	5	14	22	11	14	1	4	7	5	1	8
The forest\ forest park helps to bring jobs into the local area	12	3	6	28	13	10	6	1	7	3	0	7
I can experience local culture (e.g. arts, sculpture, events, heritage etc.) here	8	10	6	15	20	8	2	4	5	2	1	6
<b>Other</b>	2	7	4	4	7	2	2	2	4	3	0	3
<b>BASE</b>	<b>156</b>	<b>112</b>	<b>161</b>	<b>95</b>	<b>104</b>	<b>123</b>	<b>138</b>	<b>158</b>	<b>138</b>	<b>181</b>	<b>75</b>	<b>1441</b>

## 6. Recommendations

This report demonstrates that, since the previous forest visitor survey in 2014, the Forest Service estate has played an increasingly important role in contributing to the provision of outdoor recreation opportunities, regional tourism as well as the health and well-being of local communities.

The report estimates that almost 9 million visits were taken in Forest Service forests in 2019, which is a 90% uplift since 2014 (circa 20% per year since 2014).

### Recreational Activities and Facilities

The survey indicated that visitors considered the main benefit they experienced was the ability to pursue healthy activities in well-maintained forests, with the purpose of half of all visitors stated as for health and / or exercise. Moreover, of those returning visitors who had a more favourable experience compared with their previous visit, almost half (49%) cited 'better\ more walking trails\paths' and over a third (36%) cited 'well maintained facilities'. The report also shows that the introduction of new facilities including walking trails, children's play areas and cycling trails has made an impact at local forest level where applicable.

It is recommended that further recreational development of forests is focused on the key facilities associated with visitor enjoyment of forests and the natural environment such as new and improved way marked walking trails, interpretation and signage.

It is also recommended that the provision of additional facilities, including toilets, cafe provision, accommodation, pony trekking and mountain biking should be considered and prioritised on a regional basis to ensure the increased cost of maintaining these facilities provides the maximum returns in terms of visitor numbers and income generated to the local economy.

### Health & Well-Being

The Chief Medical Officer recommends that adults should be aiming for 30 minutes of moderate physical activity such as walking most days (at least 5 days per week equating to 2.5 hours per week). This report shows visits to forests already contribute to approximately 9 million hours of physical activity per annum. This is directly proportional to better healthcare for citizens and long-term savings in the administration of healthcare.

It is recommended that the potential for increasing the use of forests for health and well-being is further promoted and progressed through partnership working between Forest Service, Local Authorities and the Public Health Agency.

### Investment

The many new and improved visitor facilities located in forests during the last 5 years has resulted in a significant rise not just in visitor numbers, but also in quality of overall visitor experience. Nearly half of those surveyed (46%) expressed the view that the quality of the forest facilities had improved, and 98% rated their visit as good, very good or excellent.

This underpins the current partnership arrangements developed with local authorities and other organisations and it is recommended that this is further progressed to ensure that future investments continue to be tailored to deliver against regional recreation and tourism priorities.

### Tourism

The total annual spend associated with visits to the Forest Service estate is estimated to amount to £172 million. This demonstrates the significant economic and tourism value that can be attributed to forest tourism. The survey indicated a significant uplift in visitor numbers and spend during the last 5 years and it also recognises the value of forests to the local economy in providing opportunities to increase the length of stay of tourists as well as the role of forests in 'green' tourism by the positive response of visitors to the environmental benefits of forests.

It is recommended that Forest Service progresses their work with local authorities and Tourism NI to ensure that the forests are appropriately marketed as key attractions within overall tourist destination areas.

### Management of Competing Activities

The report demonstrates the many positive benefits associated with forest recreation. There is, however, an imperative going forward that any new facilities and activities complement and enhance the existing recreation product and do not represent a threat to the sustainable management of forests and their many environmental benefits.

It is recommended that any new recreation developments continue to be subject to local community, environment and wider planning considerations. This exercise should also address any potential health & safety issues associated with any competing activities.



# APPENDICES

## NORTHERN IRELAND FOREST SURVEY – VISITOR QUESTIONNAIRE

**Q1 : Q38 : Forest interviewing at**

**Single coded**

Please select the forest/ forest park you are interviewing at.

- 1  Castlewellan Forest Park
- 2  Tollymore Forest Park
- 3  Glenariff Forest
- 4  Florence Court Forest
- 5  Lough Navar Forest
- 6  Gosford Forest
- 7  Belvoir Forest
- 8  Drum Manor Forest
- 9  Hillsbrough Forest
- 10  Gortin Glen Forest
- 11  **Somerset Forest**

**T1 : T1 : Introduction**

**Text**

Good morning/afternoon. I am helping to conduct a survey on behalf of the Northern Ireland Forest Service to understand more about visitors to Northern Ireland's forests. The interview should take around 10 minutes and all of your answers will be treated in the strictest of confidence. The information gathered in this survey will only be used for research purposes.

**Q2 : Q41 : Arrival Time**

**Numerical; time: 24 hr**

Please could you tell me approximately what time you arrived at this forest/forest park today?

If respondent is unsure what time they arrived ask for a rough estimate.

**Q3 : Q13 : Leaving time**

**Numerical; time: 24 hr**

And what time do you intend to leave [FOREST NAME] today?

**Q4 : Q1 : Trip Profile**

**Single coded**

Which of these phrases best describes the holiday or outing that this forest visit is part of?

- 1  Day trip - less than 30 minutes in total away from home (including travel time)
- 2  Day trip - more than 30 minutes but less than 1 hour in total away from home (including travel time)
- 3  Day trip - more than 1 hour but less than 2 hours in total away from home (including travel time)
- 4  Day trip - more than 2 hours but less than 3 hours in total away from home (including travel time)
- 5  Day trip - more than 3 hours away in total from home (including travel time)
- 6  Weekend / short break (1-3 nights away from home)
- 7  Longer holiday (4 or more nights away from home)
- 8  Don't know

ASK ONLY IF Q4 : Q1=6,7

**Q5 : Q2 : Nights away from home**

**Numeric**

**Min 1 | Max 500**

How many nights are you away from home?

ASK ONLY IF Q4 : Q1=6,7

**Q6 : Q3 : Accommodation used**

**Single coded**

Which of the following best describes the type of accommodation you are staying in?

- 1  Hotel
- 2  Hostel
- 3  Self catered house or flat
- 4  Camping in this forest park
- 5  Camping elsewhere
- 6  Caravan staying in this forest park
- 7  Caravan staying somewhere else
- 9  Guesthouse/B&B
- 8  other, namely...

*\*Open \*Position fixed*

**Q7 : Q4 : Residence**

**Single coded**

Where do you normally live?

DO NOT READ OUT

- 1  Northern Ireland
- 2  Republic of Ireland
- 3  England
- 4  Scotland
- 26  Other UK (Isle of Man, Channel Islands etc.)
- 5  Wales
- 6  USA
- 7  Canada
- 8  France
- 9  Spain
- 10  Italy
- 11  Germany
- 12  Portugal
- 13  Belgium
- 14  Netherlands
- 20  Australia
- 21  South Africa
- 22  New Zealand
- 23  China
- 24  Poland
- 25  other, namely...

*\*Open \*Position fixed*

ASK ONLY IF Q7 : Q4=1

**Q8 : Q5 : NI Resident postcode**

**Open**

Can you please give me the first half of your postcode? This will only be used for analysis purposes.

**Q9 : Q6 : Method of travel**

**Single coded**

What was your main mode of travel to [FOREST NAME] today? If more than one mode of transport has been used, please select the one you used for the longest part of your journey.

- 1  By car
- 2  By train
- 3  By bus
- 4  By motorbike
- 5  By bicycle
- 6  On foot/walked
- 7  other, namely...

*\*Open \*Position fixed*

ASK ONLY IF Q1 : Q38=1,2,3,4,6,8,10 and Q9 : Q6=1,4

**Q10 : Q7 : Parking**

**Single coded**

Did you pay to park here today?

- 1  Yes - I bought a pay and display ticket
- 2  Yes - I own a season ticket
- 3  No
- 4  don't know

*\*Position fixed*

**Q11 : Q8 : Gender****Matrix**

Note how many of each gender are in the party.

**DO NOT READ OUT. NOTE INCLUDES RESPONDENT SO ONLY ONE 0 TO BE SELECTED**

	0	1	2	3	4	5	6	7	8	9
Male	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Female	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q12 : Q9 : Age of people in party****Multi coded**

Can you please tell me how many of your party, if any, fall into the following age groups?

- 1  Under 5 years
- 2  5-10 years
- 3  11-15 years
- 4  16-24 years
- 5  25-34 years
- 6  35-44 years
- 7  45-54 years
- 8  55-64 years
- 9  65+ years

**Q13 : Q39 : Activities****Multi coded**

Which of the following did you, or will you do during your visit today?

- 1  Walked a dog/ dogs
- 3  Went for a walk
- 4  Visited a heritage site
- 6  Running/jogging
- 7  Mountain biking
- 8  Cycling
- 16  Fishing
- 11  Participated in an event/organised activity
- 12  Volunteered (involving physical activity or work in the forest)
- 13  Camping in the forest
- 14  Had a picnic
- 15  Saw something in the woodland (e.g sculptures, wildlife, trees, waterfalls, castles etc)
- 16  Watching wildlife
- 17  other, namely... *\*Open \*Position fixed*

**Q14 : Q10 : Reasons for coming****Multi coded**

Which of the following best describe your reasons for visiting today? Please select all that apply

- 2  Spending some time with friends and family
- 16  Just passing by
- 26  To exercise a dog/ dogs
- 25  Health/ exercise
- 18  Been before and wanted to come back
- 19  Never been before and wanted to come
- 20  Wanted to visit this forest/ woodland
- 21  To relax/ unwind/ de-stress
- 22  To take part in a particular activity [specify]
- 23  To go to the cafe
- 24  So children could play/ get exercise
- 17  other, namely...

*\*Open \*Position fixed***Q15 : Q11 : Main reason for visiting****Single coded**

Which of the following was the main reason you have visited today?

- 2  Spending some time with friends and family
- 16  Just passing by
- 26  To exercise a dog/ dogs
- 25  Health/ exercise
- 18  Been before and wanted to come back
- 19  Never been before and wanted to come
- 20  Wanted to visit this forest/ woodland
- 21  To relax/ unwind/ de-stress
- 22  To take part in a particular activity [specify]
- 23  To go to the cafe
- 24  So children could play/ get exercise
- 17  other, namely...

*\*Open \*Position fixed*

ASK ONLY IF not Q4 : Q1=1

**Q16 : Q12 : Importance of forestry/woodland****Single coded**

How big a part did [FOREST NAME] play in your decision to visit this area today?

- 1  The only reason
- 2  A major part
- 3  A small part
- 4  No part at all

**Q17 : Q14 : Facilities****Multi coded**

Which of the following parts of [FOREST NAME] have you visited, or intend to visit today?

- 1  Walking trails
- 2  Cycle trails
- 3  Viewpoints
- 4  Camping/caravanning facilities
- 5  Gardens/peace maze (Castlewellan)
- 6  Pony trekking (Gortin Glen)
- 7  Fishing (Lough navar, Hillsborough, Castlewellan)
- 8  Water features - lough, waterfalls, rivers
- 9  Cafe/ tearooms/ restaurant
- 10  Toilets

**Q18 : Q15 : Overall spend****Multi coded**

Can you tell me how much you PERSONALLY have spent/will spend TODAY on each of the following categories. That is the amount you have spent today already plus that which you will spend later today. Please include the amount spent/you will spend on any others (adults and children) for whom you have paid/will pay.

If respondent cannot break down into categories, simply take a total amount and place into 'other miscellaneous items'

- 1  Accommodation (inc. food & drink)
- 2  Food and drink (excluding at accommodation)
- 3  Admission fees (to attractions)
- 4  Shopping (non-routine, e.g. souvenirs)
- 5  Transport (Exclude parking, but include fuel, taxis, public transport etc.)
- 6  Equipment (e.g. horse-riding)
- 7  Other miscellaneous items

**Q19 : Q16 : Spend on site****Multi coded**

And how much was spent in each category at [FOREST NAME]?

- 1  Accommodation (inc. food & drink)
- 2  Food and drink (excluding at accommodation)
- 3  Admission fees (to attractions)
- 4  Shopping (non-routine, e.g. souvenirs)
- 6  Equipment (e.g. horse-riding)
- 7  Other miscellaneous items



**Q20 : Q17 : Previous visit****Single coded**

Have you visited [FOREST NAME] before?

- 1  Yes  
 2  No

ASK ONLY IF Q20 : Q17=1

**Q21 : Q18 : How often visited in last 12 months****Matrix**

How often have you visited [FOREST NAME] in the last 12 months? How many of these visits were in spring/summer, between March and August, and in autumn/winter, between September and February?

	In spring / summer (March to August)	In autumn / winter (September to February)
Every day	<input type="checkbox"/>	<input type="checkbox"/>
2 to 6 times per week	<input type="checkbox"/>	<input type="checkbox"/>
Once a week	<input type="checkbox"/>	<input type="checkbox"/>
Several times a month	<input type="checkbox"/>	<input type="checkbox"/>
About once a month	<input type="checkbox"/>	<input type="checkbox"/>
Less often	<input type="checkbox"/>	<input type="checkbox"/>
Unsure	<input type="checkbox"/>	<input type="checkbox"/>

ASK ONLY IF Q20 : Q17=1

**Q22 : Q19 : Change in quality****Single coded**

In your opinion, how if it all has the quality of [FOREST NAME] changed over the last 3 years ?

- 1  Much better  
 2  Slightly better  
 3  No change  
 4  Slightly worse  
 5  Much worse

ASK ONLY IF Q22 : Q19=1,2

**Q23 : Q20 : Why changed (for better)**

**Multi coded**

Why do you say that?

DO NOT READ OUT CODES

- 1  More to do
- 2  More facilities/ facilities have improved
- 3  Feel safer here
- 4  Well maintained/ looked after
- 5  Better/ more walking trails/ paths
- 6  Better/more cycle trails
- 7  Cafe added/ improved/ good value
- 8  Less litter/ cleaner
- 10  Car park season tickets introduced/ good value (only forests Q7 asked of)
- 9  other, namely... *\*Open \*Position fixed*

**Q24 : Q20\_2 : Why changed (for worse)**

**Multi coded**

Why do you say that?

DO NOT READ OUT CODES

- 1  Not enough to do/ less to do
- 2  Fewer facilities/ facilities worse
- 3  Anti-social behaviour
- 10  Do not feel safe here
- 4  Not well maintained/ looked after
- 5  Walking trails/ paths in worse condition
- 6  Cycle trails in worse condition
- 11  Cycle trails introduced
- 7  Cafe gone/ expensive/ poor quality
- 8  More litter/ dog mess/ untidy
- 12  Have to pay for parking (only at forests Q7 asked for)
- 9  other, namely... *\*Open \*Position fixed*

**Q25 : Q21 : Likelihood to revisit****Single coded**

How likely would you be to make another visit to [FOREST NAME] in the next few years?

- 1  Definitely
- 2  Probably
- 3  Fairly likely
- 4  Probably won't
- 5  Definitely won't

**Q26 : Q22 : Likelihood to recommend****Single coded**

Would you recommend [FOREST NAME] as a place to visit to a friend or relative?

- 1  Definitely
- 2  Probably
- 3  Fairly likely
- 4  Probably won't
- 5  Definitely won't

**Q27 : Q23 : Performance****Single coded**

All things considered, how do you rate [FOREST NAME]?

- 1  Excellent
- 2  Very good
- 3  Good
- 4  Fair
- 5  Poor
- 6  don't know

*\*Position fixed***Q28 : Q24 : Competitive advantage****Single coded**

How strongly do you prefer visiting [FOREST NAME] to other places you could have visited to do the same activities?

- 1  Extremely strongly
- 2  Very strongly
- 3  Strongly
- 4  Only slightly
- 5  No preference
- 6  don't know

*\*Position fixed*

**Max 5**

Which of the following statements do you feel best describe [FOREST NAME]? You may choose up to 5 options

**Random**

- 1  The forest/ forest park is welcoming
- 2  The forest/ forest park is well maintained
- 3  I feel safe here
- 4  The forest/ forest park has all the facilities I need
- 15  The forest/ forest park has good quality facilities
- 5  I can pursue healthy activities here
- 6  I can experience local culture (e.g. arts, sculpture, events, heritage etc.) here
- 7  It 's a good place for people to learn about the natural environment
- 8  It's a good place for people to have fun and enjoy themselves
- 9  The forest/ forest park helps to bring money into the local area
- 10  The forest/ forest park helps to bring jobs into the local area
- 11  The forest/ forest park helps to build a sense of community
- 12  The forest/ forest park makes this area a nicer place to live
- 13  none of the above
- 14  other, namely...

*\*Exclusive \*Position fixed  
\*Open \*Position fixed*

**Max 5**

Which of the following, if any, stops you from visiting [FOREST NAME] park more often? You may choose up to 5 options.

**Random**

- 2  I feel worried about my safety
- 3  I feel out of place here
- 4  It's difficult for me to get here because I don't have a car
- 5  My health or a disability
- 6  There aren't enough facilities at this forest/ forest park
- 7  There isn't enough to do at this forest/ forest park
- 8  There isn't enough information about this forest/ forest park
- 9  Other forest sites offer more than this one
- 10  I prefer other forests/ forest parks
- 11  I do not have enough time to visit more often
- 13  I live too far away/visiting on holiday
- 15  The quality of the facilities is poor/ not good enough
- 16  Parking is too expensive (only for forests where Q7 asked)
- 17  The cafe is too expensive
- 18  Other facilities are too expensive
- 19  Lack of parking/parking not convenient/car parks full
- 12  Nothing, I visit as much as I want to
- 14  other, namely...

*\*Exclusive \*Position fixed  
\*Open \*Position fixed*

**Q31 : Q27 : Other forests visited in last 12 months**

**Multi coded**

Which other forests/ forest parks have you visited in the last 12 months?

DO NOT READ OUT

- 1  Glenariff Forest Park
- 2  Portglenone Forest
- 4  Gosford Forest Park
- 5  Slieve Gullion Forest Park
- 6  Belvoir Park Forest
- 7  Castlewellan Forest Park
- 8  Hillsborough Forest
- 9  Rostrevor Forest
- 10  Tollymore Forest Park
- 11  Castle Archdale Forest
- 13  Ely Lodge Forest
- 14  Florence Court Forest Park
- 15  Lough Navar Forest
- 16  Davagh Forest Park
- 17  Drum Manor Forest Park
- 18  Gortin Glen Forest Park
- 19  Knockmany Forest
- 20  Parkanaur Forest Park
- 21  other, namely...
- 22  none of the above

*\*Open \*Position fixed  
\*Exclusive \*Position fixed*

Client notes: Can this list be reduced to the 20 main ones?

[Remove Randalstown and Castlecaldwell](#)

**Q32 : Q28 : Main change**

**Open**

If there was one thing you would change about [FOREST NAME] what would it be?

Probe if needed: 'Any improvements?'

**Q33 : Q29 : Any other comments**

**Open**

Are there any other comments you would like to make about [FOREST NAME]?

**T2 : T2 : Classification intro**

**Text**

Please could you answer the following questions about yourself. These details will help us understand more about the social profile of our visitors.

**Q34 : Q30 : Age**

**Numeric**

**Min 16 | Max 100**

May I please ask your age?

**Q35 : Q31 : Annual household income**

**Single coded**

What is the approximate total annual income in your household (before tax)?

- 1  Under £10,000
- 2  £10,000 to £20,000
- 3  £21,000 to £30,000
- 4  £31,000 to £50,000
- 5  £51,000 to £75,000
- 6  £76,000 or more
- 7  don't know

*\*Position fixed*

**Q36 : Q32 : Working status****Single coded**

Can you tell me which of the following best describes your working status?

- 1  Working full time (30+ hrs per week)
- 2  Working part time (less than 30 hrs per week)
- 3  Retired
- 4  Parent or carer
- 5  In full time education
- 6  Unemployed
- 7  Not working due to illness/disability
- GO TO Q38Q34
- 8  Self employed
- 9  other, namely...

*\*Open \*Position fixed***Q37 : Q33 : Disability****Single coded**

Do you or anyone in your party have any long-term illness, health problem or disability which limits your daily activities or the work you or they can do?

- 1  Yes
- 2  No
- GO TO Q39Q35

**Q38 : Q34 : Type of disability****Multi coded**

Does this affect your.. (reword to does this affect their.. for other members of party)

- 1  Mobility
- 2  Vision
- 3  Hearing
- 4  Mental health
- 5  Physical health
- 6  Other

*\*Open***Q39 : Q35 : Dog ownership/care****Single coded**

Do you own or assist in the care of a dog?

- 1  Yes
- 2  No



**Q40 : Q36 : Car ownership/access****Single coded**

Do you own or have regular access to a car or other motor vehicle?

- 1  Yes
- 2  No

**Q41 : Q37 : Ethnicity****Single coded**

How would you describe your ethnic background?

- 2  Eastern European
- 3  Other White
- 4  Chinese
- 8  Other Asian
- 9  Mixed
- 5  Other Black or Minority Ethnic
- 6  Would rather not say
- 7  other, namely...

*\*Open \*Position fixed***Q42 : Q42 : Weather****Single coded**

Please select the option that most closely matches the weather at the time of this interview.

- 1  Sunny and warm/hot
- 2  Sunny and cold
- 3  Partly cloudy
- 4  Overcast
- 5  Drizzle
- 6  Showers
- 7  Rain
- 8  Heavy rain
- 9  Snow
- 10  Hailstones
- 11  Mist or fog
- 12  other, namely...

*\*Open \*Position fixed*