



Affinity Walkers in Ireland
Market Research Report
2010



Management Summary

The management summary highlights the research aims, main findings and recommendations of the walk research undertaken by CAAN and Perceptive Market Insight in August – November 2010.

Research Background and Objectives

Walking is the most popular outdoor activity in Northern Ireland, however no research had ever specifically been conducted to investigate the market. CAAN, with the support of NITB, felt it was important to get a better understanding of the walking market. The objectives of the research were to better understand:

- the drivers and preferences of the affinity walkers when taking a walking short break or holiday in Northern Ireland
- the usage, attitudes and expectations of all walkers

Methodology

Perceptive Market Research Ltd was commissioned to design the questionnaire and to carry out the face-to-face interviews at selected walking events, whilst CAAN was responsible for overseeing the project, carrying out the online research and writing the report. In total 464 responses were received between August 2010 and November 2010. A summary of the main findings is outlined below.

40% of affinity walkers are members of a walking club

The majority of all respondents were either from Northern Ireland (59%) or from the Republic of Ireland (36%). The respondents' age profile was evenly spread over four age groups (under 35s, 36-45, 46-55 and over 55s). 90% of all respondents were affinity walkers (54% enthusiasts and 36% dedicated walkers) and 40% claimed to be a member of a walking club.

80% of affinity walkers take short breaks where walking is the main reason or one of the main reasons for the trip

Of those respondents who took a walking break or holiday in Northern Ireland, 70% stayed for 2 to 3 nights and spent over half of the time of their stay walking. Respondents were accompanied by their partner or spouse or as part of a group (friends or a walking club);

Hotels and B&Bs were the preferred accommodation but other forms of accommodation (such as hostel, camping and self catering) were also remarkably popular. Whilst on a walking break, in addition to walking, affinity walkers are most likely to visit a pub or take part in general sightseeing.

The majority of walkers plan to take another walking break in Northern Ireland within the next 12 months.

Affinity walkers prefer to walk in the hills and mountains and choose medium distance walks (5 to 20 miles), without using a walk guide. The majority of respondents plan to take another walking break in Northern Ireland within the next 12 months.

Walkers are generally satisfied with the off-road walking in Northern Ireland

In general, respondents were fairly satisfied with walking in Northern Ireland with 'good off-road access', 'adequate information' and 'well maintained walks' scoring the highest. However, when answering an open ended question as to what they feel needs the most improvement, these three aspects were highlighted.

Walkni.com is the preferred method of finding out information on walking in NI

When selecting and planning a walk most respondents use either the walkni.com website or guide books and are satisfied with the quality of information found. When booking a walking break or holiday, most respondents prefer to book each element by themselves.

The Mourne Mountains are by far the most popular destination

The most popular destination for all respondents is the Mourne Mountains followed by the North Coast. The North Coast is more popular with Northern Ireland respondents. Other areas (Sperrins, Fermanagh and Strangford Lough) are more familiar to Northern Ireland respondents but in total they are not nearly as well visited as the two top destinations.

Recommendations

The research has confirmed many of the assumptions that CAAN and NITB have been using in their walking marketing planning and product development. It also throws up some questions and issues to address. As a result, it is proposed that the eleven recommendations highlighted should be taken forward in order to enhance the opportunities for walking in Northern Ireland.

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1. Introduction

Although walking is considered the most important activity tourism product in Northern Ireland, no research has been carried out to date in Northern Ireland that focuses specifically on the walking market. Consequently this research study undertaken by CAAN and funded by NITB, seeks to provide information that will help CAAN and NITB gain a better understanding of the walking market and result in better informed future product development and marketing plans.

The research had two main objectives:

- To understand the drivers and preferences of affinity walkers when taking a short walking break in Northern Ireland, primarily focusing on walkers from the Republic of Ireland but also from Northern Ireland.
- To gather information on usage, attitudes and expectations with regards to walking in Northern Ireland for all walkers

2. Methodology

The research took place between August 2010 and November 2010. 464 responses were received, 366 from an online survey and 98 through face to face interviews. The questions asked in both methodologies were the same.

Online

The online survey was designed using SurveyMonkey software and could be accessed through 2 web sites; www.walkni.com and www.mountaineering.ie. (Fig. 1)

Website	Method	Responses
Walkni.com	Pop-up survey	64
	Ezine	171 (incentivised – 94; non-incentivised – 77)
Mountaineering Ireland website*	Link to survey	131

* www.mountaineering.ie

Figure 1 Online platforms used to publish the survey

The website, www.walkni.com, provides high quality information on walks across Northern Ireland for a wide range of walkers from the dedicated to the occasional pleasure walker.¹

¹ Definition

Pleasure walker: enjoys short strolls through parks, beaches, woodlands etc, possibly with the family.

Walking enthusiast: enjoys longer walks from a few hours and up to a day, such as a mountain or scenic countryside walk.

Dedicated walker: enjoys long distance routes such as hills, mountains and more remote areas. Walking is the main focus when planning short breaks

Since its launch in 2007, the website has become the definitive source of information for walking in Northern Ireland.

During the survey period a pop-up window was placed on the main page of the website which when clicked, would lead to the survey. A total of 64 responses were collected using this method.

The website also has an associated database of 11,000 members who receive a quarterly ezine. A link to the survey was highlighted in the ezine sent out to members in August 2010. To incentivise members to complete the survey, respondents were entered into a prize draw to win walking gear, sponsored by Rohan. A total of 171 responses were collected using this method.

Mountaineering Ireland (MI) is the governing body for walking and climbing clubs for the whole of Ireland. It has 130 affiliated walking clubs (14 of which are in Northern Ireland) with approximately 10,000 members (700 from Northern Ireland). MI agreed to support the research by placing a link to the survey on its website (mountaineering.ie) for a period of four weeks. 131 responses were received through this link.

Face-to-face interviews

Face-to-face interviews were carried out by Perceptive Insight Market Research Ltd. (PMR). PMR was commissioned to carry out interviews with the participants of three walking festivals namely, the Sperrins Walking Festival, the Wee Binnian Walking Festival and the Carlow Walking Festival. In addition, interviews were also undertaken at the annual general meeting of Mountaineering Ireland. In total, 98 face-to-face interviews were carried out.

Event	Date	Responses
Sperrins Walking Festival	7-8 August 2010	38
Wee Binnian Walking Festival	4-5 September 2010	18
Carlow Walking Festival	9-10 October 2010	28
Mountaineering Ireland AGM	23 October 2010	14

Figure 2 Face-to-face interviews

At the Wee Binnian and Carlow Walking Festivals and MI's AGM, those interviewed were exclusively from the Republic of Ireland.

Questionnaire

The questionnaire was designed by PMR and covered five sections as outlined below. Sections A, D and E were to be answered by all respondents, whilst sections B and C were filtered by whether respondents had taken a walking holiday or short break in Northern Ireland. The full questionnaire can be found in the Appendix.

Section A – general demographics, level of walking, walking club membership, and walking short break/holiday taken in the Great Britain, Republic of Ireland and Northern Ireland.

Section B – (only open to those who have not been on Northern Ireland) the questions of this section relate to preferences of respondents when they plan a short break/holiday in the UK or Ireland where walking is the main purpose or one of the main purposes of the visit.

Section C – (only open to those who have been to a walking holiday in Northern Ireland) the questions of this section relate to respondents' last trip to Northern Ireland where walking was either the main reason or one of the main reasons for the trip.

Section D – walking destinations in Northern Ireland respondents have visited.

Section E – general questions on how Northern Irish walking destinations and other aspects of walking are perceived by respondents, what sources of information are used to select and plan walks in Northern Ireland, and what aspects of walking need further improvement.

Report

CAAN was responsible for overseeing the project, carried out the online research and writing the report.

3. Results

3.1 Who we spoke to

Gender, place of residence and age profile

57% of respondents were male and 43% were female. In the responses given throughout the survey, there was no significant difference between genders.

59% of respondents were from Northern Ireland and 36% from the Republic of Ireland. The sample size of respondents from elsewhere (GB and other countries) was insignificant, therefore only responses from Northern Ireland and the Republic of Ireland residents were considered. (See Fig.3)

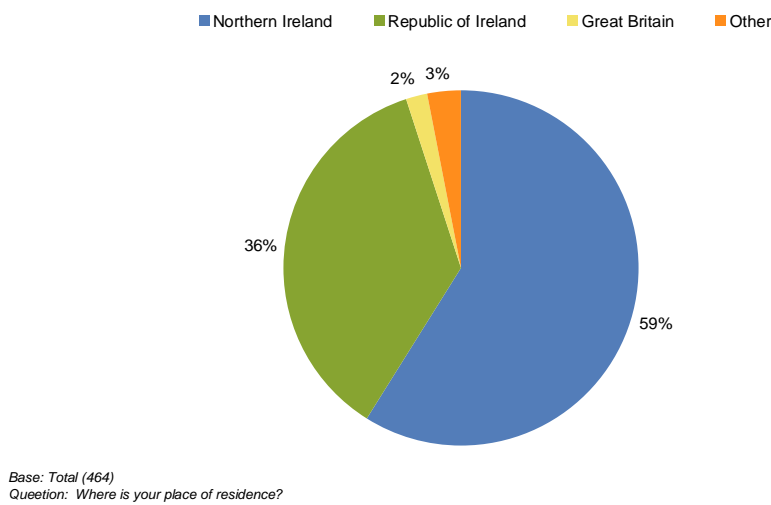


Figure 3 Place of origin

An even spread of all age groups was represented in the survey. (See Fig.4)

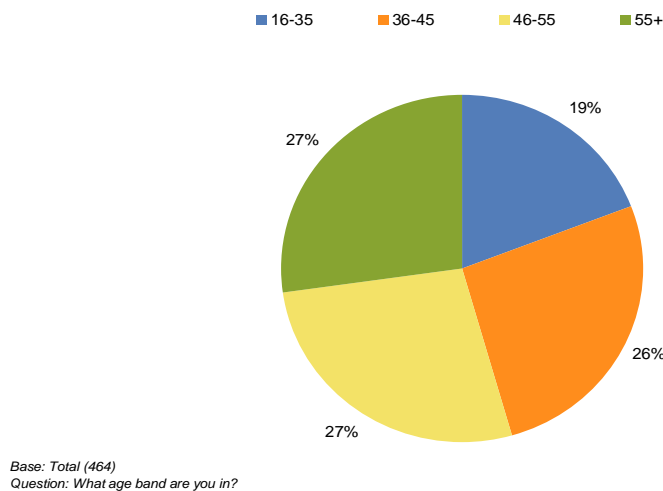


Figure 4 Age profile of respondents

Type of walkers

The majority of walkers claimed to be either enthusiasts or dedicated. The sample size of pleasure walkers is rather insignificant. In comparison, respondents from the Republic of Ireland, due to the methodology, tend to be more dedicated than those from Northern Ireland. Most respondents from the Republic of Ireland were interviewed on either the Mountaineering Ireland AGM or on walking festivals, both of which are more likely to attract dedicated walkers. (Fig. 5)

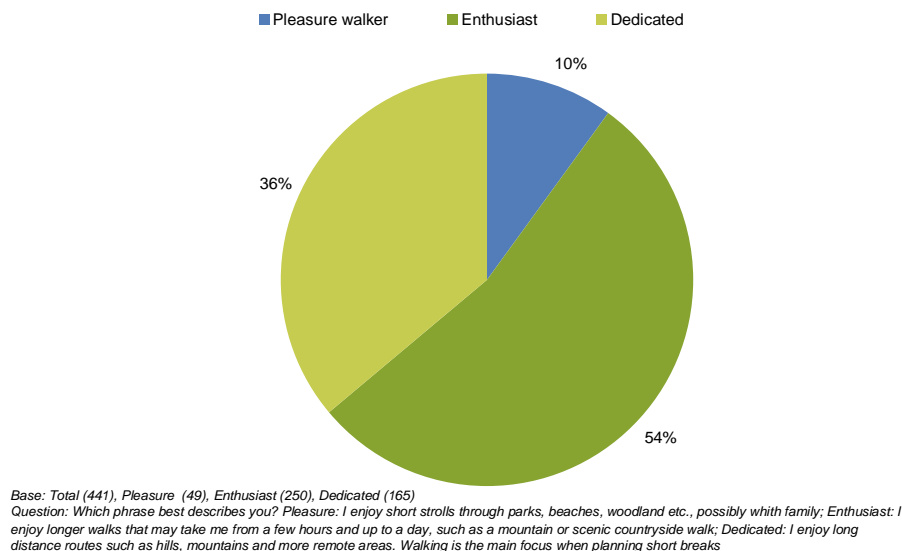


Figure 5 Respondents' level of walking

40% of all respondents stated that they were members of a walking club. There is a significant difference between respondents from Northern Ireland and the Republic of Ireland. Half of the Republic of Ireland respondents were club members in comparison to only a third of Northern Ireland respondents. This can be explained as part of the interviews with Republic of Ireland residents took place at the Mountaineering Ireland AGM, the governing body of walking and climbing clubs in Ireland. (See Fig.6)

64% of those who claimed to be a member of a walking club, were aged 45 or above.

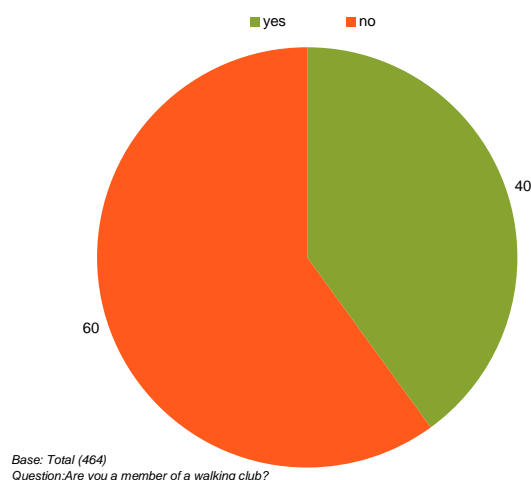
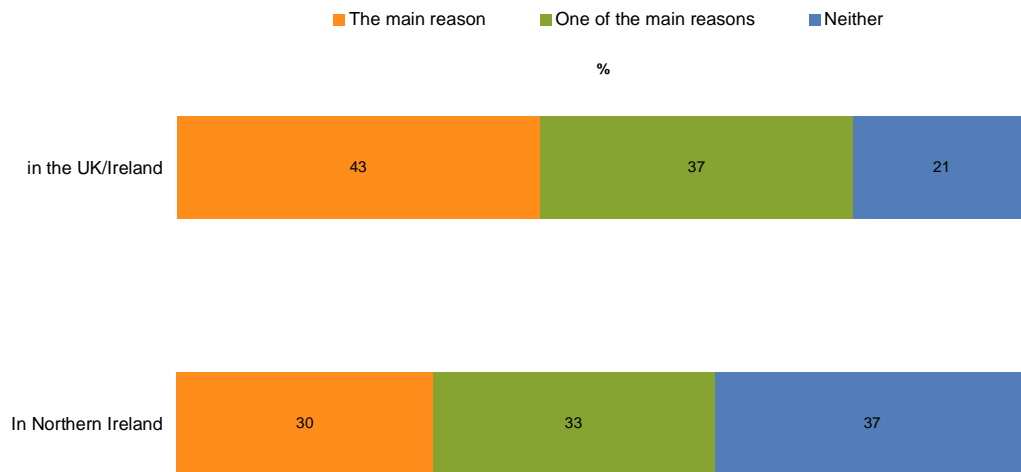


Figure 6 Walking club membership

Walking breaks/holiday

Respondents were asked whether they had ever taken a short break or holiday where walking was the main reason or one of the main reasons of the trip.

43% said that they took a short break or holiday in the UK or in Ireland where the main aim was to walk, compared to Northern Ireland (30%). There is also a significant difference when looking at responses by place of residence: more Republic of Ireland respondents claimed to have taken a short break or holiday where walking was the main reason for the trip.



Base: Total (464), in the UK/Ireland (441), in Northern Ireland (422)
 Question: Have you taken short breaks or holidays /in the UK or Ireland/in Northern Ireland where walking was...

Figure 7 Respondents who took a walking short break or holiday

Based on the answers given to the question above, respondents were routed further to the appropriate sections of the questionnaire. The following section of this report discusses the responses of those who claimed to have taken a break or holiday in Northern Ireland where walking was the main reason or one of the main reasons for the trip.

Summary of differences in profile

Some of the small differences in profile of respondents can be explained by what group they came from. This should be taken into consideration throughout this report (see Fig. 8)

	Place of Residence	Age		Level of walking	Member of a walking club
Walkni.com Ezine	95% from NI	35<	19%	61% Enthusiast 22% Dedicated	30% Member
Walkni.com Pop-up	80% from NI	35<	23%	56% Enthusiast 25% Dedicated	17% Member
Mountaineering Ireland website	79% from ROI	35<	27%	40% Enthusiast 57% Dedicated	50% Member
Face to Face interviews (including Festivals and MI AGM)	62% from ROI 38% from NI	35<	14%	58% Enthusiast 38% Dedicated	53% Member
		36-45	23%		
		46-55	24%		
		55+	38%		
		36-45	38%		
		46-55	22%		
		55+	17%		
		36-45	26%		
		46-55	28%		
		55+	18%		
		36-45	22%		
		46-55	36%		
		55+	28%		

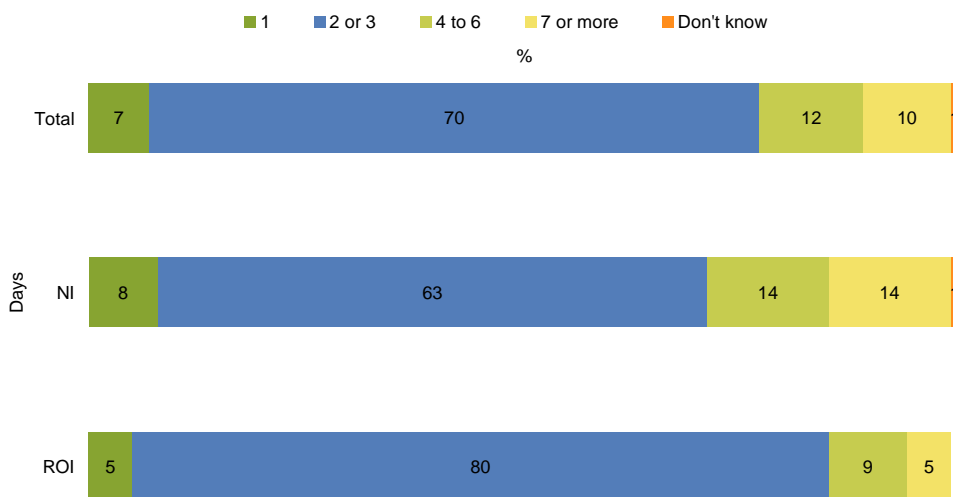
Figure 8 Profile of respondents by survey method used

3.2 Walking breaks taken in Northern Ireland

In this section, respondents who took a short break or holiday in Northern Ireland of which the main purpose or one of the main purposes was to walk, were asked to describe their last walking short break/holiday that they took in Northern Ireland. 239 responses were received, of which 50% were enthusiast and 45% dedicated walkers.

Length of trip

The majority (70%) of respondents spent 2 to 3 days in Northern Ireland while only one quarter stayed for more than 4 days or longer. (Fig. 9). Residents from Northern Ireland were found to be more likely to stay more that 4 days or longer.



Base: Walked in NI - Total (230), NI(134), ROI (96)
 Question: The last time you took a walking short break/holiday, how many nights was your stay?

Figure 9 The length of the last walking short break/holiday taken in Northern Ireland – all who took a trip to Northern Ireland

When looking at the relationship between the length of the trip and the number of days spent walking, it is clear that regardless of the length of the trip, the majority (around 60%) of the respondents are likely to spend at least half of their short break/holiday walking. Respondents spent most time of their break walking when on a 2 to 3 day long break. (Fig. 10)

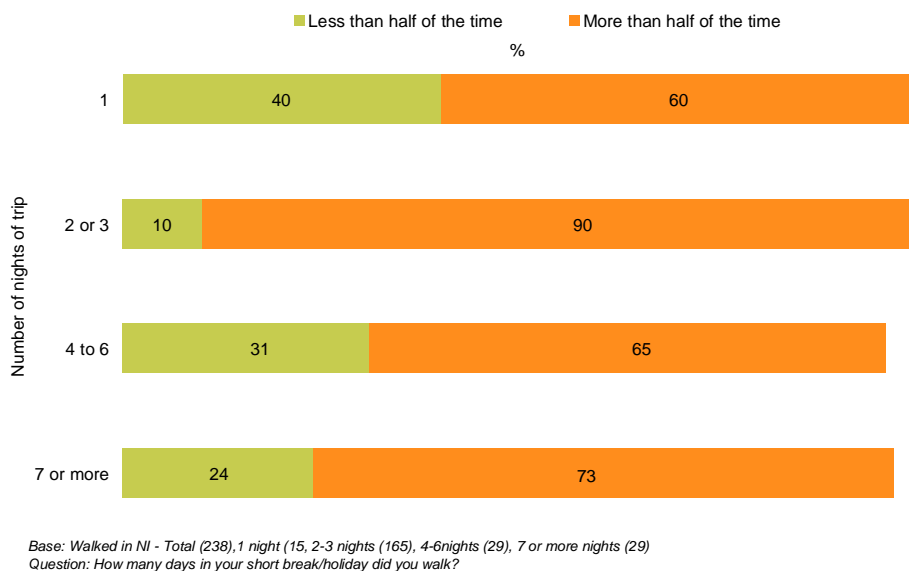


Figure 10 Time spent walking while on short break/holiday in Northern Ireland

Who do people take walking breaks with

The results show that 43% of respondents prefer to go on a walking break/holiday with their partner or other family members (Fig. 11). Respondents from the Republic of Ireland are also more likely to be accompanied by friends or by members of a walking club. (However as for the latter, it should be remembered that 63% of all Republic of Ireland respondents were members of a walking club)

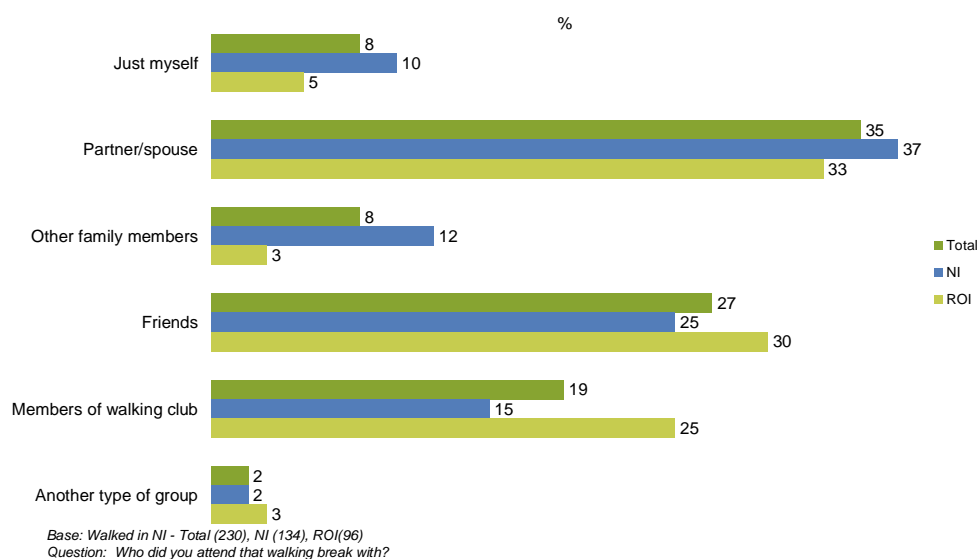


Figure 11 Accompanied by whilst on walking break in Northern Ireland

The attitudes of respondents show a different trend with regard to who they are accompanied by on their walking break/holiday when looking at the responses split by age, dedication level or if respondents are members of a walking club. Although in all responses partner or spouse is the preferred company for all respondents.

The younger age groups, i.e. under 36 years tend to take a walking break, if not with their partner or spouse (39%), with their friends (35%). The over 55s named members of a walking club as company on their walking break/holiday (32%) in second place, after partner/spouse.

Walking club members, if not with their club members (39%), tend to go with their partner/spouse (28%) or with friends (19%).

Dedicated walkers' second choice for company after partner or spouse (37%) was either friends (24%) or other walking club members (25%), while enthusiast walkers prefer friends (30%) as company after their partner/spouse (33%).

Accommodation

Whilst half of all respondents taking a walking short break or holiday in Northern Ireland preferred hotels or B&Bs, it is striking how popular other forms of accommodation are, in particular self catering, hostels and camping. (Fig. 12)

There is also a significant difference in choice of accommodation when looking at the age of respondents (Fig 13). Over 55s clearly prefers to stay in hotels or B&Bs whilst the younger respondents (16-35) chose to camp or stay in a hostel.

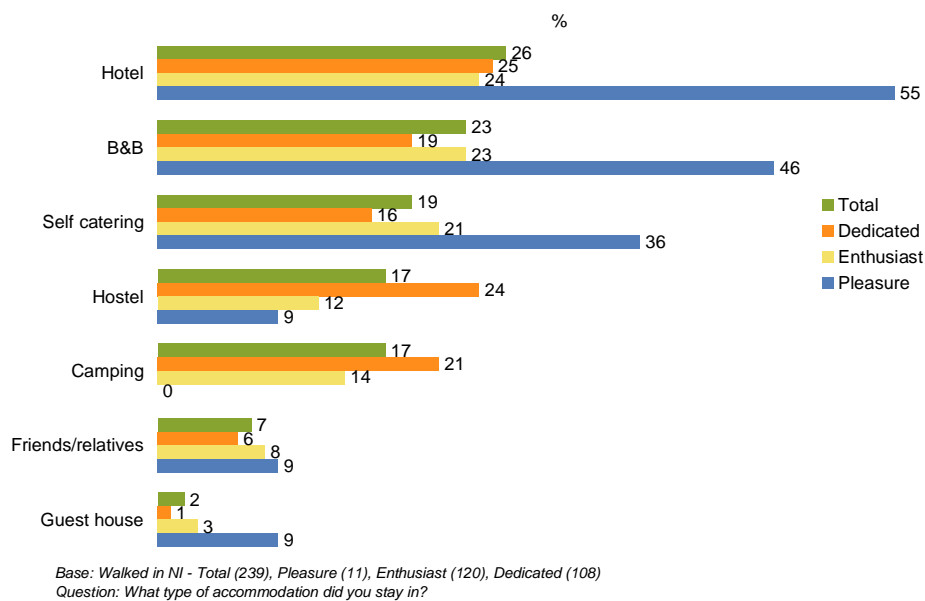


Figure 12 Type of accommodation used

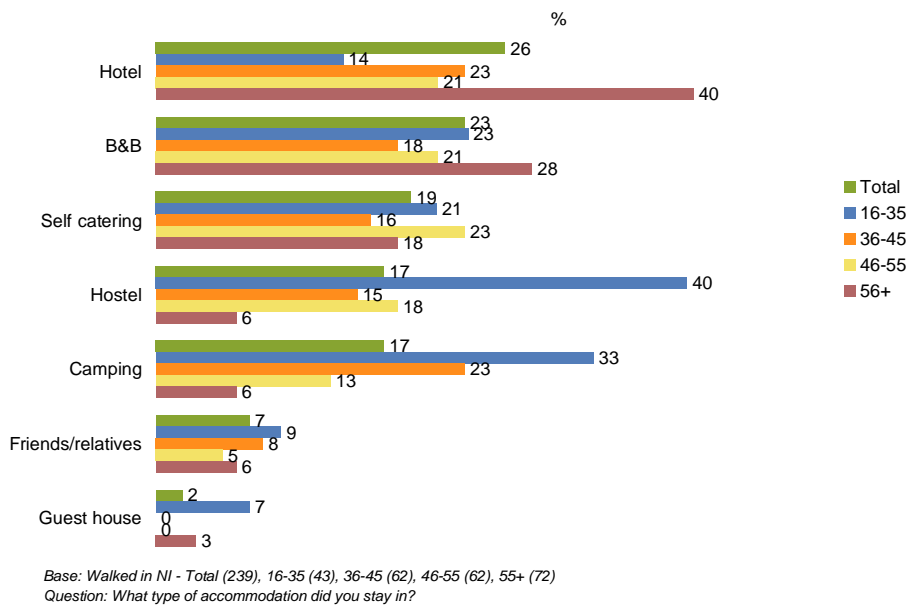


Figure 13 Type of accommodation used – by age

When accommodation choice was correlated with ‘who they were accompanied by’, the results showed that the majority of those who go on a walking break/holiday with their partner or spouse stay in a hotel (31%), although B&B or camping was also a popular choice (both 22%).

Those who claimed to go with other family members tend to choose self catering accommodation (50%).

Walkers accompanied by their friends on their walking break prefer to stay at a B&B (34%), while walking club members stay at hotels (33%) or hostels (29%).

Other activities

When asked what other activities respondents took part in, the most popular response was ‘visiting a pub’ followed by ‘general sightseeing’. The dedicated walkers are more likely to do “other outdoor activities”, while enthusiast and pleasure walkers prefer to “visit a castle/house or other historic monument”. (Fig. 14)

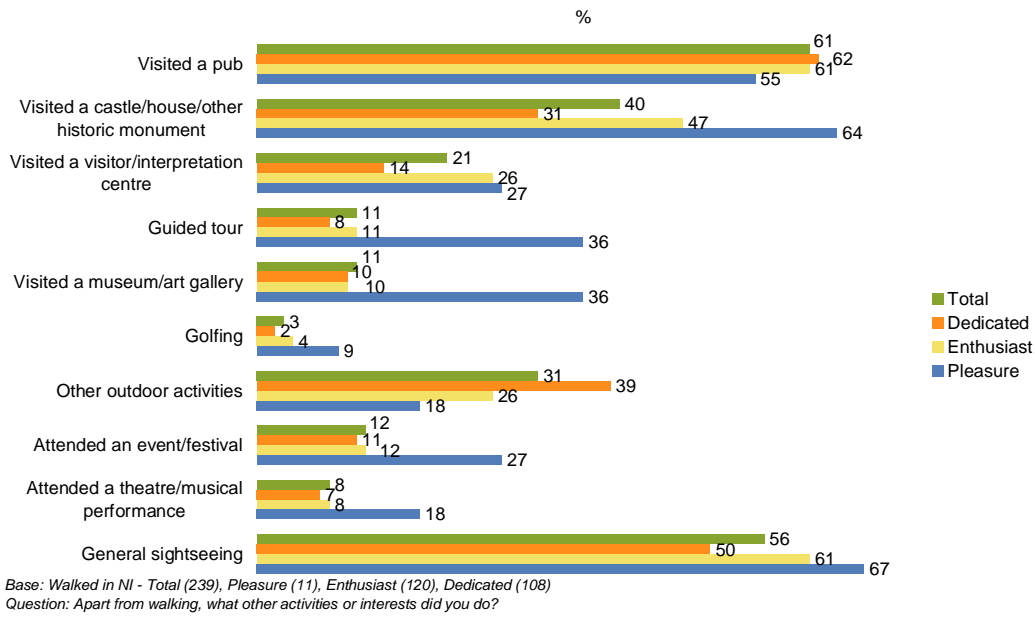


Figure 14 Other activities undertaken whilst in Northern Ireland

Type of walking

The majority of respondents indicated that they preferred hill or mountain walking. This was not true however for the pleasure walker who stated that they preferred parks or coastal walking.

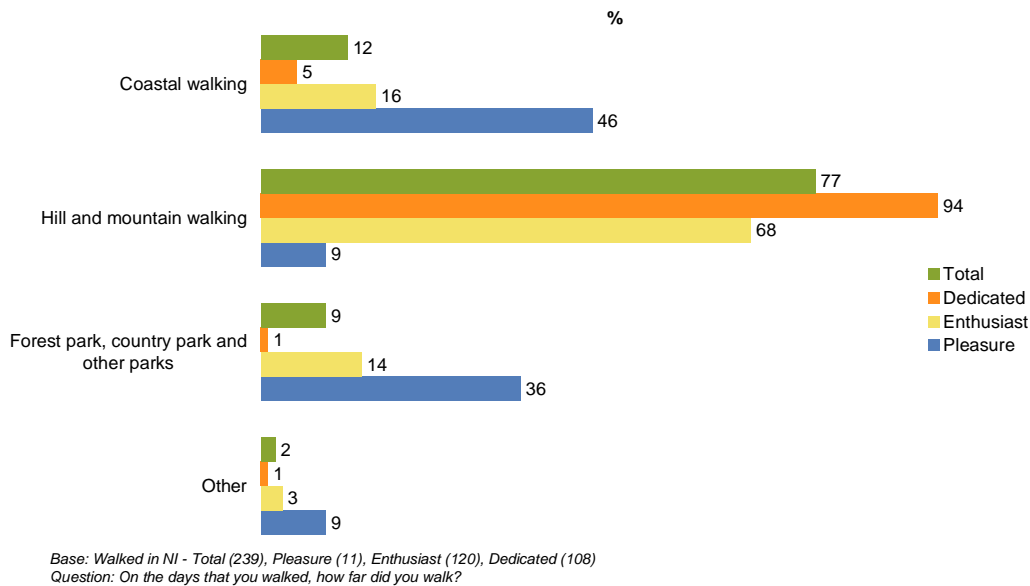
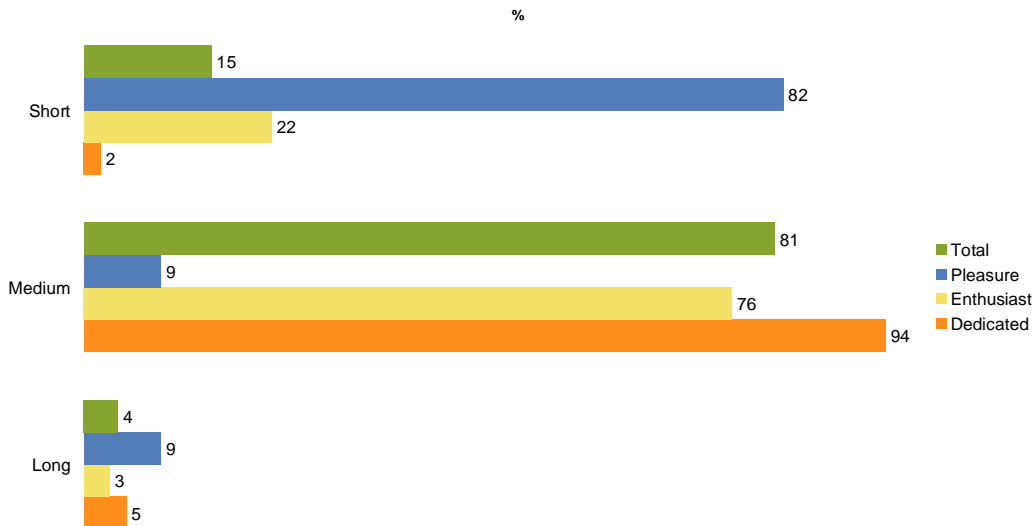


Figure 15 Type of walking undertaken

Distance walked

Responses with regard to the distance they walked whilst in Northern Ireland were grouped into short, medium and long distance walks.² Most enthusiast and dedicated respondents took part on a medium distance walk whilst in Northern Ireland, while pleasure walkers preferred shorter walks. The apparent high percentage of pleasure walkers going on a long distance walk (9%) is due to the small sample size of the group. (See Fig. 16)



Base: Walked in NI - Total (239), Pleasure (11), Enthusiast (120), Dedicated (108)
Question: On the days that you walked, how far did you walk?

Figure 16 Distance walked

Walk Guide

Only 7% of all respondents who walked in Northern Ireland paid a walk guide to lead them on a walk.

Did you pay a walk guide to lead you on any of the walks?	
Yes	7.0%
No	93.0%

Figure 17 Use of a walk guide – those who walked in Northern Ireland

It is interesting that over one third of those who had never taken a walking break or holiday in Northern Ireland claimed that they would use the services of a walking guide.

Would you pay a walk guide to lead you on any of the walks? (Those who did not take a walking break/holiday in Northern Ireland)	
Yes	35.5%
No	64.5%

Figure 18 Preference to use a walk guide – those who did not take a walking break/holiday in Northern Ireland

² Short distance walk: up to 5 miles/8 km; Medium distance walk: up to 20 miles/32 km; Long distance walk: over 20 miles/32 km

Future walking break in Northern Ireland

Respondents were very positive about their intention of taking a walking short break or holiday in the next 12 months in Northern Ireland. (Fig. 19) A third of all respondents said that they intended to take a short break or holiday in Northern Ireland within the next 3 months.

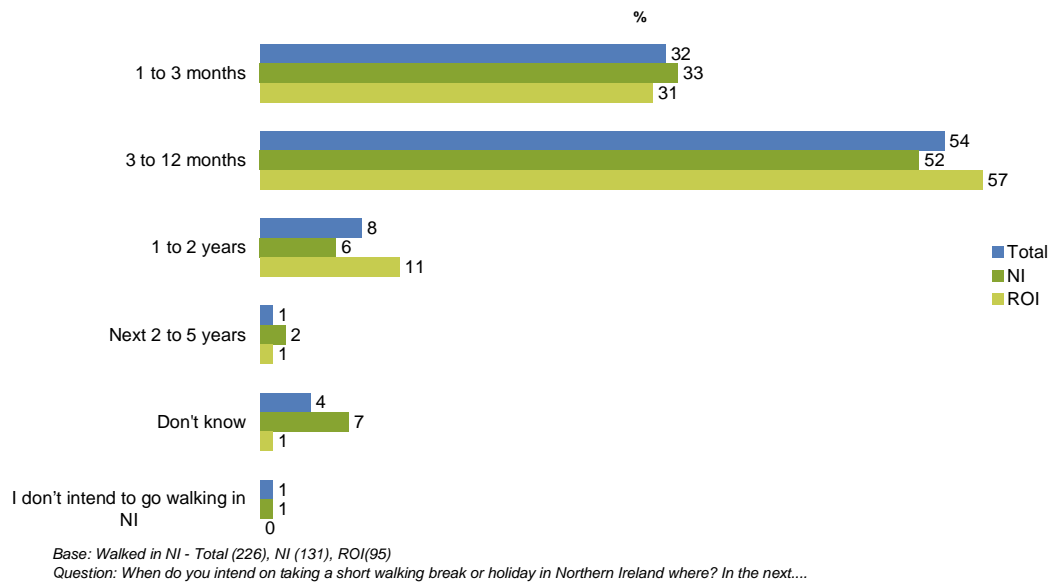


Figure 19 Intention of coming back to Northern Ireland for a walking short break/holiday in Northern Ireland

Respondents who have never been to Northern Ireland on a walking break/holiday were asked whether they would consider coming in the future to Northern Ireland to walk. Over 50% stated that they would and that walking would be the main or one of the main reasons for the trip. However, when asked specifically when in the future would they come, responses showed more uncertainty in comparison to those who already have walked in Northern Ireland. (Fig. 20 and 21)

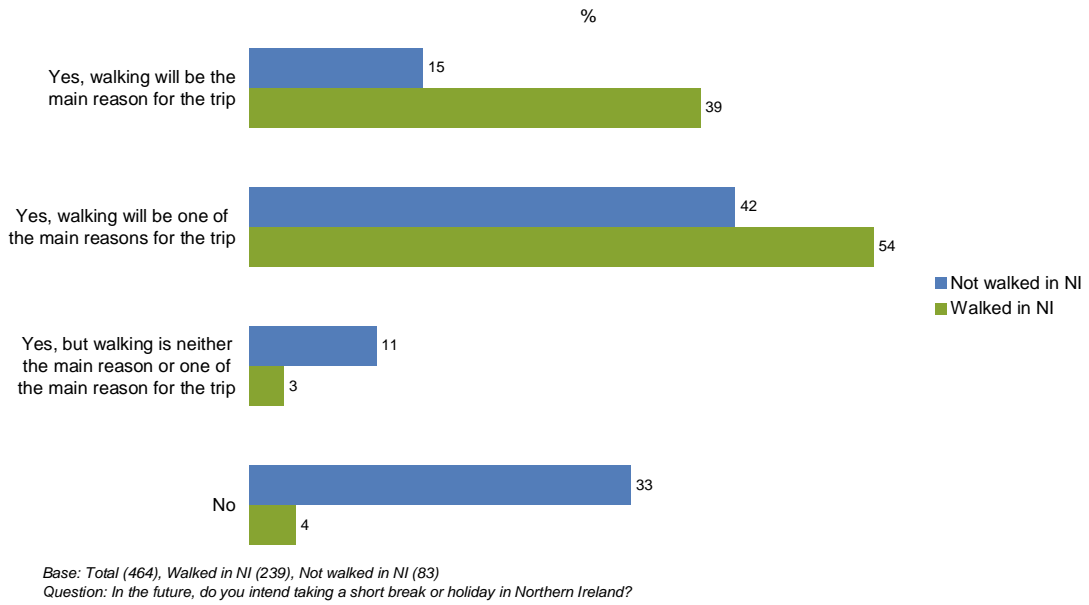


Figure 20 Intention of coming to Northern Ireland

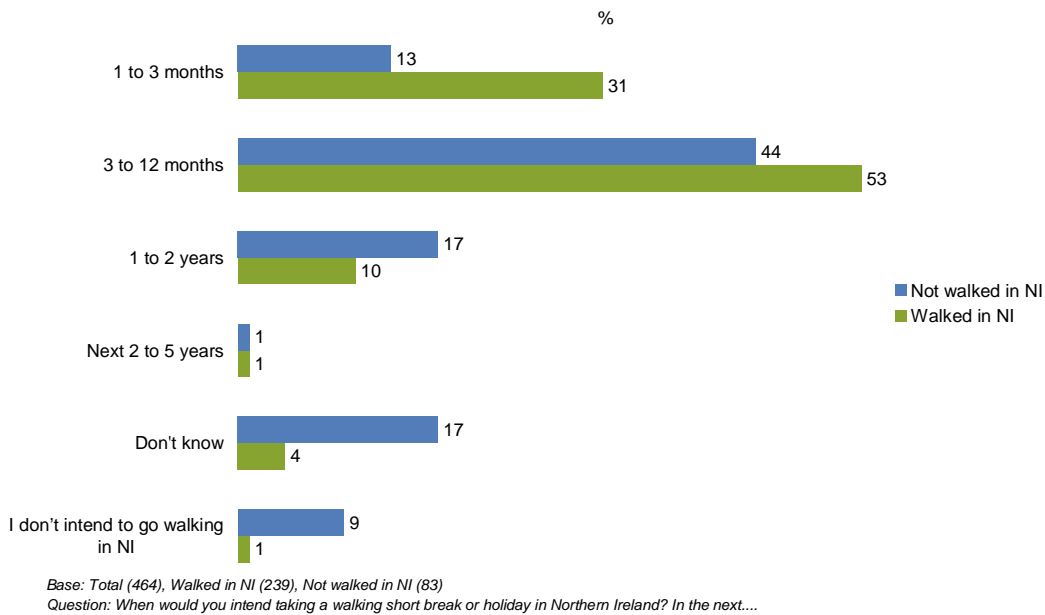


Figure 21 Intention of coming to Northern Ireland at a future date

4. Satisfaction and Expectations

Respondents were asked how satisfied they were with the various aspects of walking in Northern Ireland. For each aspect they could express their level of satisfaction by choosing from “agree strongly” to “disagree strongly”.

Above the red line the majority of respondents agree with the statements, whereas below the line they either ‘sit on the fence’ or disagree with the statements (Fig. 22). Respondents were most satisfied with the availability of off-road walking possibilities, but were least impressed with accommodation providers’ knowledge on local walks and the appropriateness of information at the start of the walks.

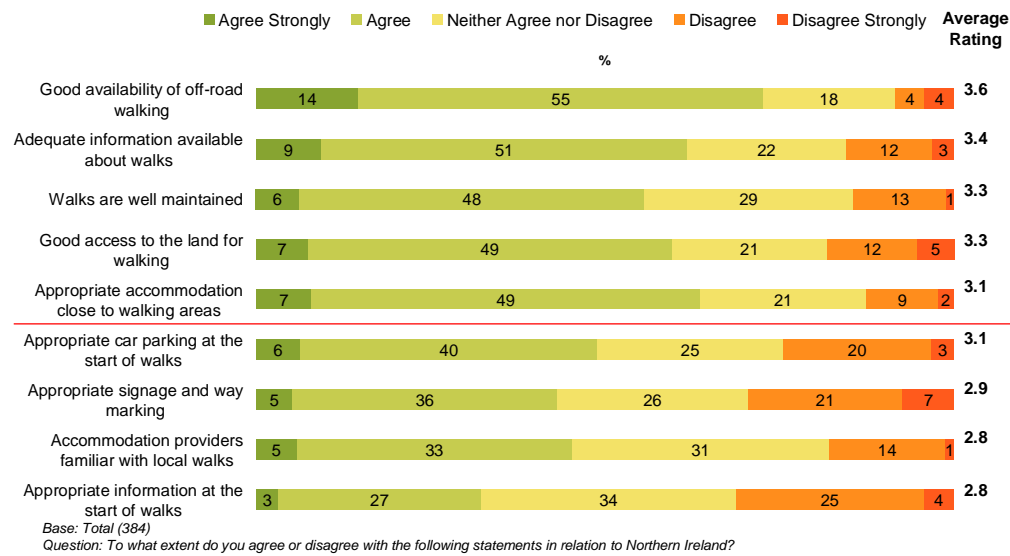


Figure 22 Satisfaction with aspects of walking in Northern Ireland

Walkers Welcome Scheme

To help inform the potential of setting up a Walkers Welcome Scheme in Northern Ireland, respondents were asked to indicate how important a list of services would be, if provided by the accommodation provider. Most respondents indicated that it would be beneficial if accommodation providers could offer drying facilities and information on local walks. A hot drink on arrival or a guided walk were rated as least important for walkers. Looking at the average rating figures, however, most of the aspects are rated as important (3.5 and above). (Fig. 23)

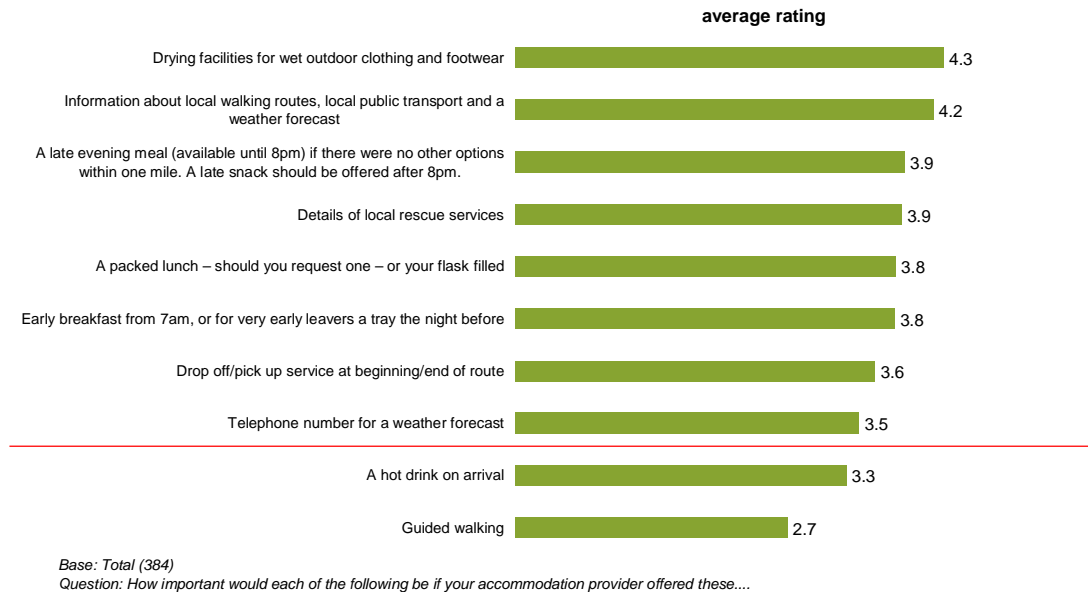


Figure 23 Expectation from accommodation providers

Suggestions to further improve walking in Northern Ireland

Respondents were also asked in an open ended question to express their opinion on what aspect of walking in Northern Ireland they felt needed most improvement. The 376 responses are grouped into the following categories (in order of importance):

- Facilities/Hardware on walks
- Information/PR
- Access
- Accommodation
- Environmental issues
- Events
- Others

From all responses 29 people said that they found nothing that would need any improvement, but in general the Republic of Ireland respondents were more satisfied than Northern Ireland walkers with walking in Northern Ireland.

Facilities/Hardware on walks

Within this category most respondents highlighted that signage needed the most improvement. More pleasure walkers and enthusiasts found that more and better signage is required along the trails.

More and safer car parking facilities were highlighted as the second most important issue within this category. Some walkers felt that this was a real problem and have personally experienced vandalism towards their own vehicles while out walking.

According to respondents public transport needs much improvement especially in walking areas to better cater for walkers wanting to start early and return late. Also the already existing Rambler Bus Service should operate throughout the year instead of during school holidays only.

It was felt that the maintenance of walks should be more consistent and better organised.

Furthermore, it was suggested that more stiles over fences were needed, cleaner and better toilet facilities near to the start/end of walks.

"In the Mournes, the Mourne Rambler only operates for 2 months a year, July and August and the rest of the year you have to pick a route close to a main bus route and you cannot explore the inner Mournes.."

Information/PR

Most people said that there is a need for more marketing and public awareness. Many felt that walking needed to be better advertised in general and some suggested the use of national and local media such as TV, daily papers and non-walking magazines. Some respondents spontaneously mentioned the Irish Times. Respondents from the Republic of Ireland specifically highlighted the lack of information available to them on walking opportunities in Northern Ireland.

More pre-walk literature and information on site should be made available, as well as better maps in print or in a downloadable format. It was also suggested that GPS coordinates should be made available on the walkni.com websites for all walks.

Some respondents felt that the awareness of walks and walking should be improved with accommodation providers and other service providers (pubs, service stations) so tourists could get 'hands-on' information on site.

"Show information on TV about the many walks in and around Belfast and other areas."

"Promotion of the next step up from social type walking activities so that people who enjoy walking are encouraged to take the next step."

Access

Although when asked as a specific question, most respondents agreed that there is 'good availability of off-road walking' in Northern Ireland (see Fig. 23). However, when answering the open ended question, access issues were flagged as the third most important issue to be addressed. Specifically respondents would like to have more access to off-road walking in the Sperrins and in the Glens of Antrim. It was also suggested that better communication between walkers and farmers was necessary, and guidance on public access and clarity on which areas are not available for walkers.

"More access to areas, better communication between walkers and farmers."

"We need more walking routes especially in the Glens of Antrim. Glenariff glen is a prime example of a wasted opportunity to utilise the beautiful Lurigethan mountain combined with the old mineral railway on the other side of the glen. A marvellous circular route could be created here."

"Off road access - having walked many sections of old and now revamped Ulster Way, the level of walking based on B roads is very high, compared to other areas like the Lake District and North Wales."

Accommodation

Respondents would like to see more walker friendly accommodation closer to walks, especially cheaper forms of accommodation such as hostels or camping. It was also suggested that a few bothies in the Mournes and Sperrins would be very welcome.

With regard to accommodation providers, respondents felt that drying facilities, drop-off pick-up and/or bag courier services would be very useful.

"Bag courier service and ability to walk from accommodation to accommodation especially north coast, mournes and Fermanagh"

Environmental issues

Many respondents highlighted that litter was a major problem along routes especially in the Mournes. It was suggested that more education for the public on the impact of walking on the environment should be provided, such as the Leave No Trace principles.

Erosion prevention and trail management was also highlighted as a very important issue that need addressing.

"Highlight the amount of litter being dropped by people in the hills."

"Education of walkers and public re: erosion of tracks. Walkers should stick to single track as much as possible and avoid widening tracks. Mourne particularly badly affected."

Events

Some respondents felt that more walking events, such as festivals or organised/guided walks are necessary, or the already existing events need more publicity. Also more 'after events' would be very welcome, such as the Blister Ball.

"...more after walk things like a dance + buffet make it more social."

Area specific issues

- Mourne – lack of signage, litter, public transport
- Sperrins – more access, more facilities, accommodation closer to walks
- Antrim Glens – more access

"mountain walks such as the Mourne. There's quite a lot of litter left behind each time novice campers come and don't know the meaning of leave no trace."

*"Improved access and more paths in Sperrins.
Better signposting in lesser known areas.
Places for visitors to stay are very limited in some areas."*

Country specific issues

The perception of those coming from the UK mainland with regard to access to off-road walking in Northern Ireland is very different to those who come from the Republic of Ireland.

“Access to land and way-marking of footpaths. As a family who moved from England to here 3 years ago, we are appalled by the lack of Public Footpaths locally compared to England, Scotland and Wales.”

“Walking in Northern Ireland better organised and accessible than in the Republic! Hats off to you for trying to improve it!”

Respondents from the Republic of Ireland also named some specific aspects that need to be improved:

- Information/PR
- Walking Festivals – better advertising and make accessible for non-walking club members
- Accommodation – closer to walks and cheaper
- Facilities – safe car parking

“Maybe to advertise more, perhaps a spread in the Irish Times. Let the people know about it.”

“Promotional offers/courses to attract walkers/climbers. Exchange type walks/climbs between clubs in Southern Ireland and Northern Ireland.”

On the more positive note

“I can't think of anything specific as I think too much interference would take away that sense of adventure and finding your own way. Unfortunately the thing that needs most improvement is the one thing we can't control, the weather!!”

“Getting the walkni.com site well known. Answering this survey was the first I'd heard of it, had a quick look & it looks great! Some of my favourite walks are in the north, hopefully finding this site will help me find many more.”

5. Sources of Information

When selecting and planning a walk in Northern Ireland most enthusiast and dedicated walkers use the Walkni.com website or guidebooks. (Fig. 24) Word of mouth information from friends and family was also mentioned as an important source of information. The website Discovernorthernireland.com was ranked in 4th place for finding walking information.

There are significant differences when looking at results split by the place of residence. Most walkers from Northern Ireland are actively using the Walkni.com website as the main source for their walking information, while Republic of Ireland walkers seem to prefer Guidebooks.

Under the category “Other” most respondents specified maps, the internet in general and local knowledge.

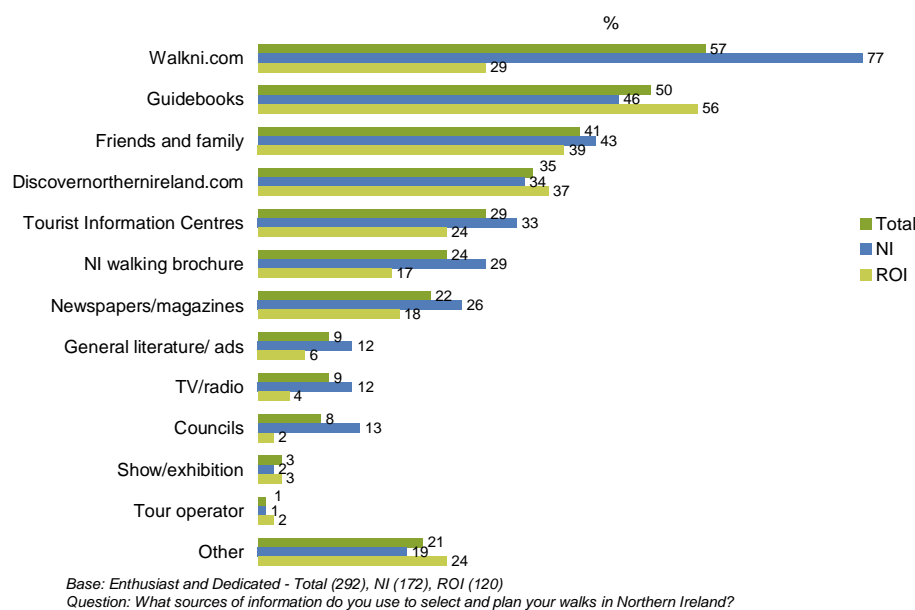


Figure 24 Information sources to select and plan walks

The vast majority of respondents prefer to book each element of their walking break or holiday themselves. Booking packages offered by a local accommodation provider seems a slightly more popular option than packages offered by tour operators or local walk guides.

Which of the following did you use to book a walking break/holiday in Northern Ireland?	
Answer Options	Response Percent
Tour operator package	3.0%
Package offered by local accommodation provider	7.2%
Package offered by local walk guide	3.8%
Booked each element individually myself	86.0%
<i>answered question</i> 236	

Figure 25 Ways of booking a walking break/holiday in Northern Ireland

The level of satisfaction expressed by respondents regarding the sources of information used when planning to go walking was very positive. (Fig. 26)

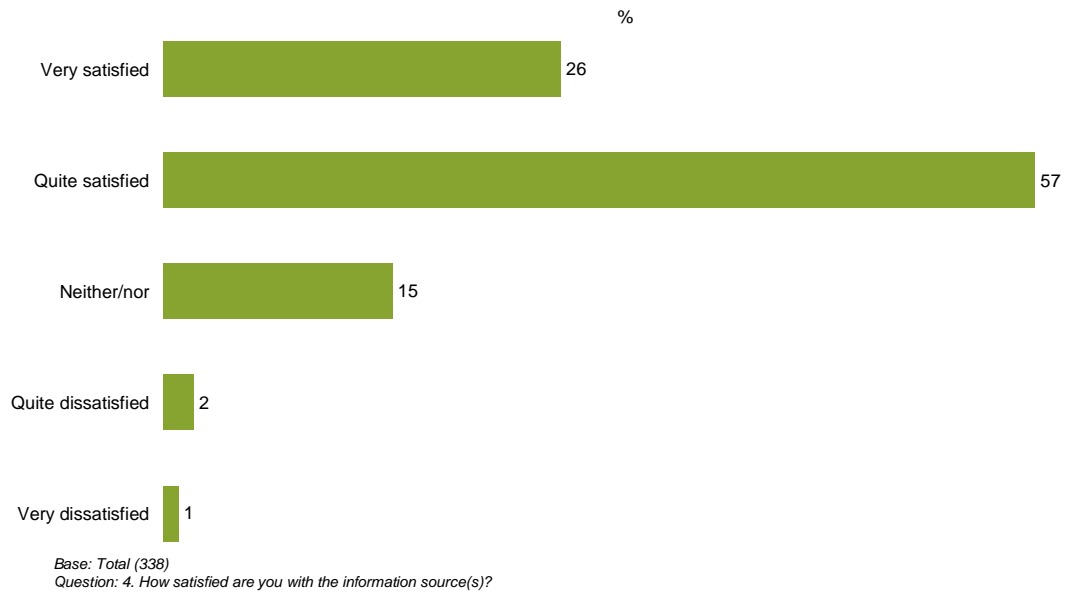


Figure 26 Satisfaction with source of information

6. Destinations

The most popular walking destinations visited by respondents were the Mourne Mountains and the North Coast. The Sperrins, Strangford Lough Area and Fermanagh were visited by just over a third of all respondents. Republic of Ireland respondents were less likely to visit the North Coast or other destinations than Northern Ireland walkers (Fig. 27). This tendency is also true when looking at the level of walking (Fig. 28). 90% of the dedicated walkers have visited the Mournes but show significantly less interest in other destinations (North Coast visited by 60% and less at other destinations). Walking enthusiasts show a similar pattern whereas for pleasure walkers, the North Coast was the most preferred walking destination.

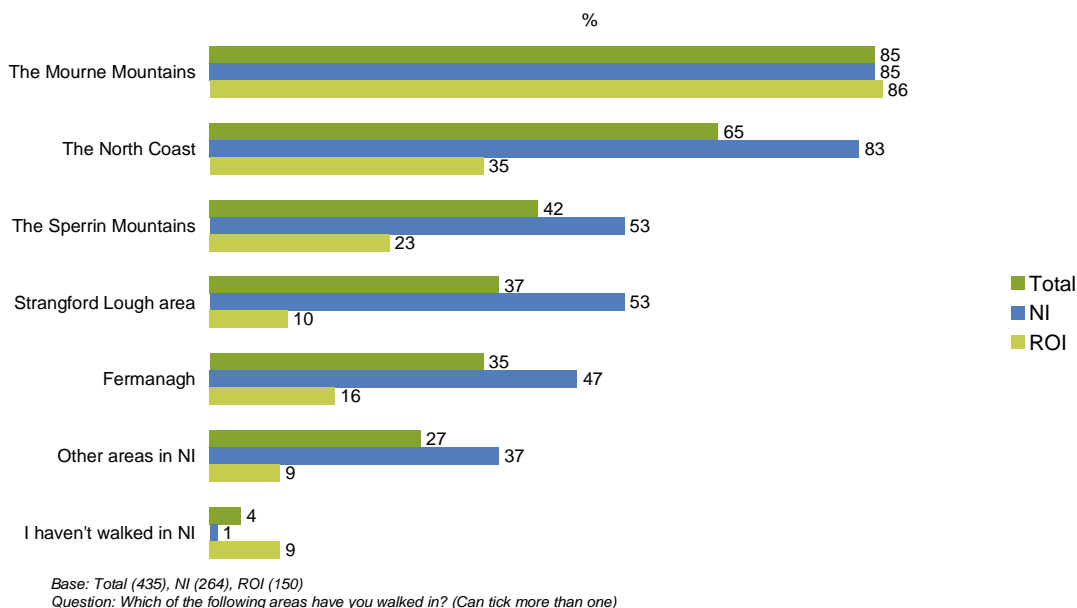


Figure 27 Areas where respondents walked – by place of residence

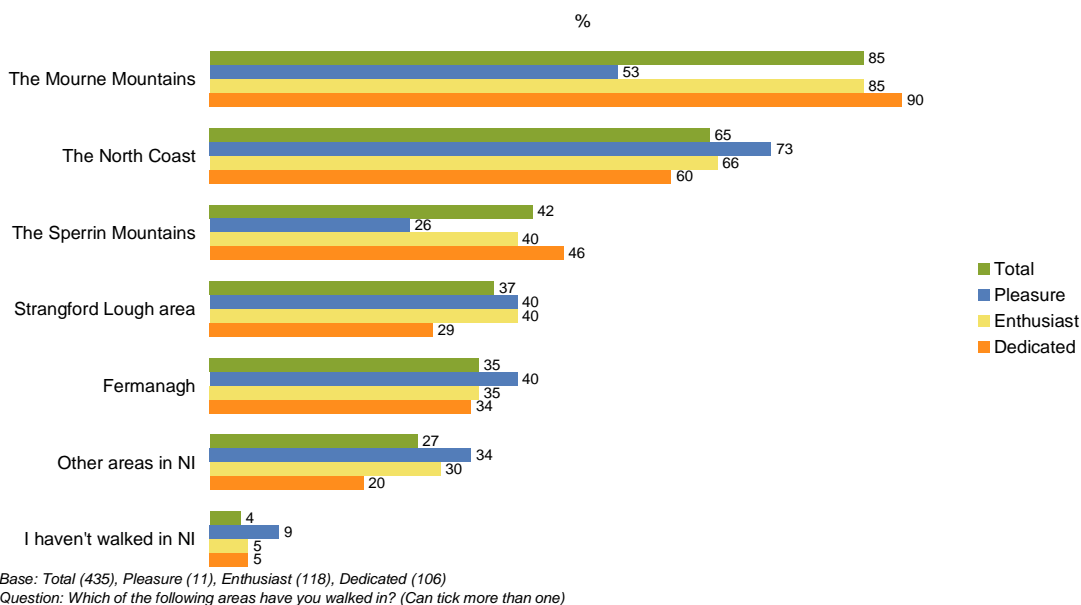


Figure 28 Areas where respondents walked – by level of walking

All respondents were invited to answer the question, ‘where would you intend to go walking in the future’. (Fig. 29) The Mourne Mountains was found to be the most preferred destination however whilst 90% of Republic of Ireland respondents wanted to visit it in the future, only 63% of Northern Ireland respondents indicated that they planned to walk in the Mourne Mountains in the future. Other destinations are less likely to be visited in the future.

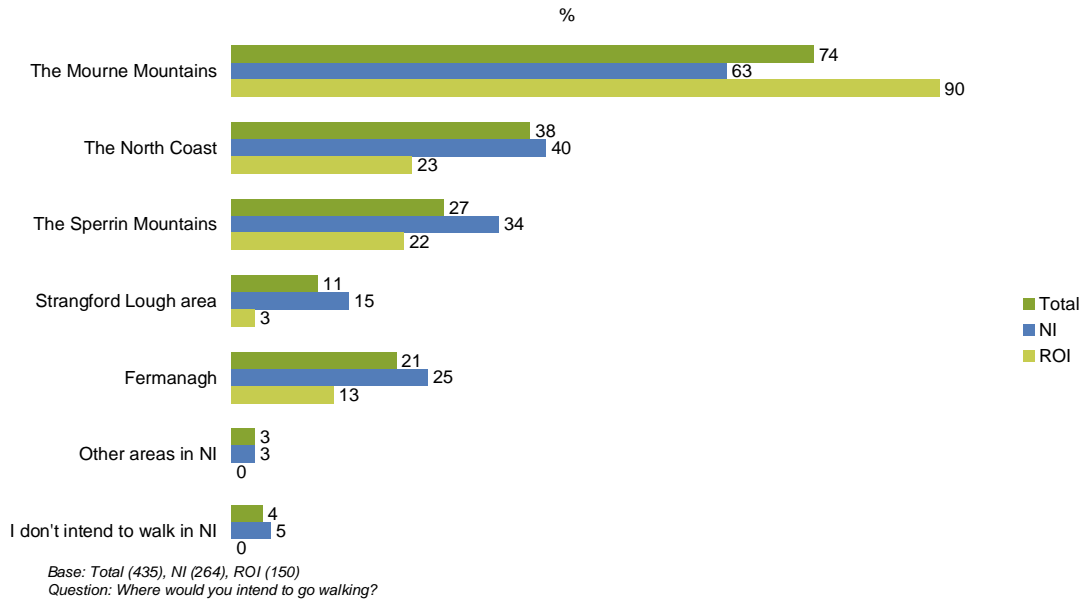


Figure 29 Future walking destinations – by place of residence

When looking at the level of dedication, the dedicated and enthusiast walkers are most likely to visit the Mourne Mountains but less likely to go to other destinations, while pleasure walkers plan to go to the North Coast

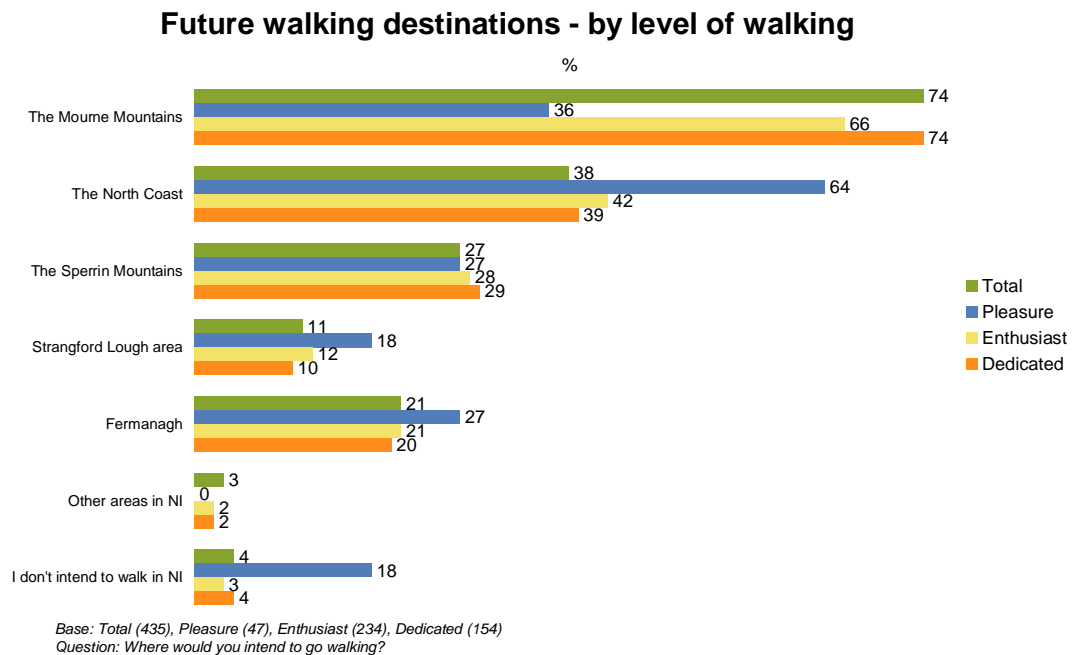


Figure 30 Future walking destinations – by level of walking

Most respondents indicated that the Mourne Mountains whilst good for mountain walking, are untouched and wild and are a great all around destination, they are too crowded.

This was also true of the North Coast. Respondents indicated that the North Coast is great for coastal walking, steeped in history, a great all around destination, but also too crowded.

Respondents associated the Sperrins Mountains with being untouched and wild, having access issues for walkers and there being nothing else to do. (Fig. 31)

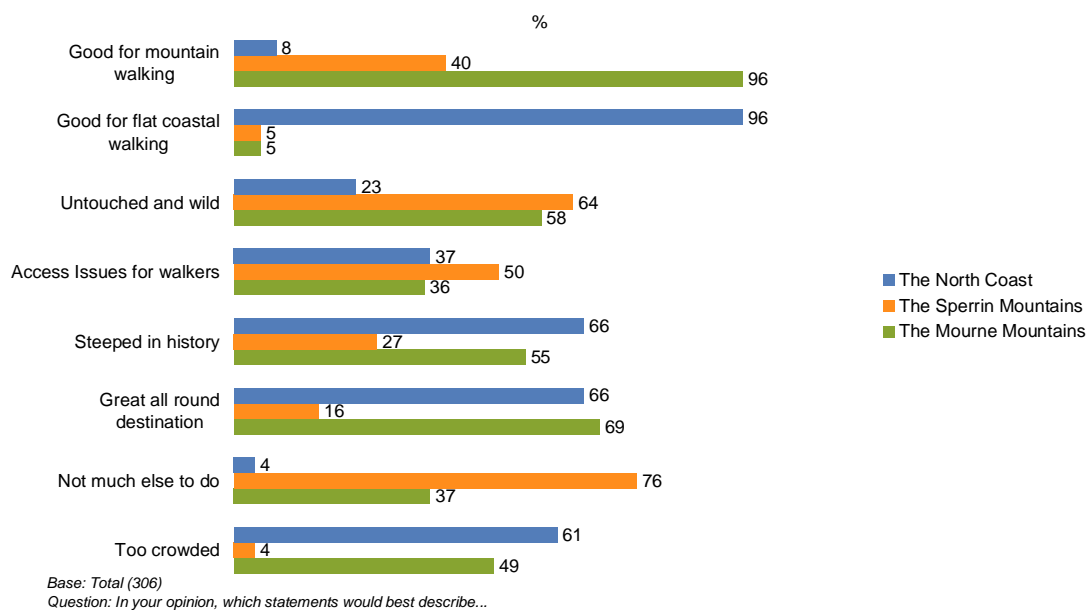


Figure 31 Associations with destinations

7. Recommendations

The research has confirmed many of the assumptions that CAAN and NITB have been using in their walking marketing planning and product development. This research gives confidence to make decisions based on evidence. Additionally, this research challenges some of the assumptions and preconceptions (for example, that walkers are older and prefer budget accommodation) so it will be instrumental in shaping CAAN and NITB plans going forward.

As a result of the key findings in this report, it is proposed that the following specific recommendations should be taken forward in order to enhance the opportunities for walking, in particular in relation to the Republic of Ireland market:

1. Share the information from this research to the Regional Tourism Partnerships and other relevant organisations as appropriate (e.g. Mourne Heritage Trust) discussing how best to take forward the results for their particular walking cluster.
2. Increase the promotional and marketing activities in the Republic of Ireland (ROI) of walking in Northern Ireland and specifically for walkni.com. This should be through the walking clubs and their network (for example, Mountaineering Ireland). However, as the majority of walkers are not walking club members, the marketing effort needs to also concentrate on other non-club communication channels. The primary opportunities to promote and market to them are:
 - a. Through broadsheets in the Republic of Ireland (The Irish Times has been spontaneously mentioned). Consider if further budget is available to boost the PR efforts currently taking place.
 - b. Through enthusiast online & offline forums e.g. www.mountainviews.ie, Walking World Ireland magazine
 - c. Improve the Search Engine Optimisation(SEO) for walkni.com on .i.e. web searches on Google including “Walking in the Mournes”
3. Whilst not probed specifically in the research, walking festivals were spontaneously mentioned. It appears that there is an appetite to attend such events and there is a need to promote these to a greater degree.
4. Many people, particularly in the Republic of Ireland, are using discovernorthernireland.com to get information in walking. The walking information could be more prominent and enhanced.
5. Given the wide range of accommodation required by walkers and the type of walkers that come (groups are the largest but couples are also surprisingly high), a much wider range of accommodation should be better catered for on the walkni.com guides, websites and offers and be included in the Walkers Welcome Scheme. In particular, hotels and B&Bs should become a more integral part of the offering.
6. Approach Translink in order to extend the period the Rambler Bus Service operates and in particular the Mourne Rambler bus service
7. Hold product workshops with accommodation providers and Tourist Information Centres to inform and educate on the walks in the area. The focus of this in the first instance should be the Mourne Mountains and if possible form an integral part of the Walkers Welcome Scheme.

8. Highlight the signage and car parking concerns that respondents raised with the product development team, and discuss what specific action can and should be taken to address those concerns.
9. Investigate the cost / benefit of creating and adding the GPS co-ordinates for the Ulster Way and all quality walks
10. More prominence should be given to the Leave No Trace message on all communications, particularly in the Mourne Mountains where there is a perceived issue of litter and erosion.
11. As with all research further questions are raised. It is recommended that in 2011 or 2012 the following areas are investigated further:
 - a. what media Republic of Ireland walkers consume
 - b. numbers of people from ROI who would attend a walking festival in Northern Ireland
 - c. GB walking market preferences

Appendix - Questionnaire

Int. No				Edit		Data entry		Back check		Ser no				
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As part of our quality control procedures a percentage of respondents are re-contacted by our office to ensure that the interview was conducted as instructed and according to the Market Research Code of Conduct. May I have your contact details for this purpose?

Respondent name				
Telephone number INCLUDING STD CODE				
May we contact you to participate in further research about walking?	yes	1	no	2

I declare that this interview was conducted within the Market Research Society's Code of Conduct and according to instruction and that the respondent was unknown to me. I understand that all information given to me must be kept confidential.

INTERVIEWER NAME	
INTERVIEWER NUMBER	

I declare that this interview was conducted within the Market Research Society's Code of Conduct and according to instruction and that the respondent was unknown to me. I understand that all information given to me must be kept confidential.

Date: _____ Signed _____

Interviewer check that respondent has not already taken part in this survey

Int. No			
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Edit		Data entry		Back check	
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Ser no				
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Good morning/afternoon, my name is ... from Perceptive Insight Market Research. We are conducting some research with walkers today on behalf of the Countryside Access & Activities Network. Would you have a few moments to answer some questions? It should take no longer than 5 to 7 minutes. Please be assured that all information that you provide will remain confidential and will not be attributed to you. It will only be used when joined with the responses of other walkers to provide an overview of their perceptions.

S1 INTERVIEWER - RECORD WALKING FESTIVAL

Sperrins	1
Wee Binnian	2

S2 INTERVIEWER – RECORD DAY OF INTERVIEW

Saturday	1
Sunday	2

S3 Are you aged 16 or over

Yes	1	Continue
No	2	Thank and close

Section A

A1 Record gender

Male	1
Female	2

A2 Where are you from? (where do you normally reside)

Northern Ireland	1
Republic of Ireland	2
Great Britain	3
Rest of Europe (Please specify country)	4
Rest of world (Please specify country)	5

A3 What was your age last birthday? Record exact and code on grid

EXACT AGE			
16-25	1	46-55	4
26-35	2	55+	5
36-45	3		

A4 Which type of walk do you prefer most?

SINGLE CODE

Short strolls through parks, beaches, woodlands etc, possibly with the family	1
Longer walks that may take me from a few hours and up to a day, such as a mountain or scenic countryside walk	2
Long distance routes such as hills, mountains and more remote areas. Walking is the main focus when planning short breaks	3
None of these	4

A5 Are you a member of a walking club?

Yes	1
No	2

A6a Do you take short breaks or holidays where walking is

The main reason for taking the trip	1	Continue
One of the main reasons for taking the trip	2	Continue
Neither	3	Go to Section D

A6b	Have you taken short breaks or holidays in the UK and Ireland where walking was.....	The main reason for taking the trip	1	Continue
		One of the main reasons for taking the trip	2	Continue
		Neither	3	Go to Section D

A7	Have you taken a short break or holiday in Northern Ireland where walking was	The main reason for taking the trip	1	Go to Section C
		One of the main reasons for taking the trip	2	Go to Section C
		Neither	3	Go to Section B

Section B – Those who have taken walking breaks but not in NI – code 3 at A7

When you are planning a short break/holiday in the UK or Ireland where walking is the main purpose of the visit or one of the main purposes of the visit, which of the following would be your preferences?

B1	How many nights would be your preferred length of stay? SINGLE CODE	1	1
		2-3	2
		4-6	3
		7 or more	4
		Don't know/not sure	5

B2	At what time of year would you prefer to take a walking break? SINGLE CODE	Spring	1
		Summer	2
		Autumn	3
		Winter	4

B3	Who are you most likely to go on the walking break with? SINGLE CODE	Just myself	1
		Partner/spouse	2
		Other family members	3
		Friends	4
		Members of walking club	5
		Another type of group (please specify)	6

B4	What type of accommodation would you prefer to stay in? SINGLE CODE	Hotel	1
		Bed and Breakfast	2
		Staying with friends / relatives	3
		Hostel	4
		Self catering flat/house/cottage	5
		Guest house	6
		Camping	7
		Other (please specify)	8

Showcard B5/C5

B5 Apart from walking, what other activities would you be interested in doing?

MULTICODE

Visiting a pub	1
Visiting a castle/house/other historic monument	2
Visiting a visitor/interpretation centre	3
Guided tour	4
Visiting a Museum/art gallery	5
Golfing	6
Other outdoor activities	7
Attending an event/festival	8
Attending a theatre/musical performance	9
General sightseeing	10
None of the above	11
Other (please specify)	12

B6 Which of the following would you prefer to use to book a walking break/holiday in NI?

SINGLE CODE

Tour operator package	1
Package offered by local accommodation provider	2
Package offered by local walk guide	3
I prefer to book each element individually myself	4

B7 What type of walking would you mostly do?

SINGLE CODE

Coastal walking	1
Hill & mountain walking	2
Forest park, country park and other parks	3
Other (please specify)	4

B8 How many days in your short break/holiday would you walk?
SINGLE CODE

1	1
2	2
3	3
4	4
5	5
6	6
7 or more	7
Depends on length of break/holiday	8
Don't know/not sure	9

Showcard B9/C9a

B9 On the days that you walk, how far would you typically walk?
SINGLE CODE

Up to 3 miles/5 km	1
3 to 5 miles/5 to 8 km	2
5 to 10 miles/8 to 16 km	3
10-20 miles/ 16km to 32km	4
Over 20 miles/over 32 km	5

B10 Would you pay a walk guide to lead you on any of the walks?

Yes	1
No	2

B11 In the future, do you intend to take a short break or holiday in NI where walking is.....

The main purpose of the trip	1	Continue
One of the main purposes of the trip	2	Continue
None of the above	3	Go to Section D

Showcard B12

B12 Where would you intend to go walking?
CODE ALL THAT APPLY

The Mourne Mountains	1
The North Coast	2
The Sperrin Mountains	3
Strangford Lough area	4
Fermanagh	5
Other (please specify)	6

B13 When would you intend taking a short break or holiday in NI where walking is the main or one of the main purposes of the trip? In the next.....

1 to 3 months	1
3 to 12 months	2
1 to 2 years	3
Next 2 to 5 years	4
Don't know	5

Showcard B14/C14

B14 What sources of information would you use to select and plan your walks in Northern Ireland?

MULTICODE

Walkni.com	1
Discovernorthernireland.com	2
Tourist Information Centres	3
Councils	4
Northern Ireland walking brochure	5
Show or exhibition	6
General promotional literature and advertising on Northern Ireland	7
Travel programmes on TV/Radio	8
Articles in newspapers/magazines	9
Tour operator	10
Advice from family and friends	11
Guide books	12
Other (please specify)	13

B15 How satisfied are you with the information source/s that you normally use to plan your walks in NI?

Very satisfied	1
Quite satisfied	2
Neither/nor	3
Quite dissatisfied	4
Very dissatisfied	5

Now go to Section D

Section C - Those who have previously taken a walking break in NI – 1 or 2 at A7

Ask respondents to think of the last walking break they took in NI (not this festival)

C1 The last time you took a walking short break/holiday, how many nights was your stay?

1	1
2-3	2
4-6	3
7 or more	4
Don't know/not sure	5

C2 What time of the year was that walking break in?
SINGLE CODE

Spring	1
Summer	2
Autumn	3
Winter	4

C3 Who did you attend that walking break with?
SINGLE CODE

Just myself	1
Partner/spouse	2
Other family members	3
Friends	4
Members of walking club	5
Another type of group (please specify)	6

C4 What type of accommodation did you stay in?
SINGLE CODE

Hotel	1
Bed and Breakfast	2
Staying with friends / relatives	3
Hostel	4
Self catering flat/house/cottage	5
Guest house	6
Camping	7
Other (please specify)	8

Showcard B5/C5

C5 Apart from walking, what other activities or interests did you do?
MULTICODE

Visited a pub	1
Visited a castle/house/other historic monument	2
Visited a visitor/interpretation centre	3
Guided tour	4
Visited a Museum/art gallery	5
Golfing	6
Other outdoor activities	7
Attended an event/festival	8
Attended a theatre/musical performance	9
General sightseeing	10
None of the above	11
Other (please specify)	12

C6	Which of the following did you use to book a walking break/holiday in NI? SINGLE CODE	Tour operator package	1	
		Package offered by local accommodation provider	2	
		Package offered by local walk guide	3	
		I prefer to book each element individually myself	4	
C7	What type of walking did you mostly do? SINGLE CODE	Coastal walking	1	
		Hill and mountain walking	2	
		Forest park, country park and other parks	3	
		Other (please specify)	4	
C8	How many days in your short break/holiday did you walk? SINGLE CODE	1	1	
		2	2	
		3	3	
		4	4	
		5	5	
		6	6	
		7 or more	7	
		Don't know/not sure	8	
Showcard B9/C9a				
C9a	On the days that you walk, how far did you walk? SINGLE CODE	Up to 3 miles/5 km	1	
		3 to 5 miles/5 to 8 km	2	
		5 to 10 miles/8 to 16 km	3	
		10-20 miles/ 16km to 32km	4	
		Over 20 miles/over 32 km	5	
C9b	Did you pay a walk guide to lead you on any of the walks?	Yes	1	
		No	2	
C10	In the future, do you intend to take another short break or holiday in NI where walking is.....	The main purpose of the trip	1	Co nti nu e
		One of the main purposes of the trip	2	Co nti nu e
		None of the above	3	Go to C1 3
C11	Where would you intend to go walking?	The Mourne Mountains	1	
		The North Coast	2	
		The Sperrin Mountains	3	
		Strangford Lough area	4	
		Fermanagh	5	
		Other (please specify)	6	
C12	When do you intend on taking a short break or holiday in NI where walking is the main or one of the main purposes of the trip? In the next.....	1 to 3 months	1	
		3 to 12 months	2	
		1 to 2 years	3	
		Next 2 to 5 years	4	
		Don't know	5	

ASK ONLY FOR THOSE CODED 2-5 AT A2

C13 What sources of information did you use to select and plan your walking breaks in Northern Ireland?

MULTICODE

Tour operator	1
Walkni.com	2
Discovernorthernireland.com	3
Northern Ireland walking brochure	4
Show or exhibition	5
General promotional literature and advertising on Northern Ireland	6
Travel programmes on TV/Radio	7
Articles in newspapers/magazines	8
Advice from family and friends	9
Guide books	10
Other (please specify)	11

ASK ALL

C14 What sources of information did you use to select and plan your walks in Northern Ireland?

MULTICODE

Walkni.com	1
Discovernorthernireland.com	2
Tourist Information Centres	3
Councils	4
Northern Ireland walking brochure	5
Show or exhibition	6
General promotional literature and advertising on Northern Ireland	7
Travel programmes on TV/Radio	8
Articles in newspapers/magazines	9
Tour operator	10
Advice from family and friends	11
Guide books	12
Other (please specify)	13

C15 How satisfied were you with the information source(s) that you used?

Prompt to pre-code

Very satisfied	1
Quite satisfied	2
Neither/nor	3
Quite dissatisfied	4
Very dissatisfied	5

Section D – ASK ALL

Perception of walking in Northern Ireland

D1 Have you walked in....?

Code all that apply including location of today's festival

The Mourne Mountains	1
The North Coast	2
The Sperrin Mountains	3
Strangford Lough area	4
Fermanagh	5
Other (please specify)	6

Showcard D2

D2 In your opinion, which three of these options would best describe

(ask all three, even if they haven't visited the areas)

Coding three per location

	Mournes	North Coast	Sperrins
Good for mountain walking in Northern Ireland	1	1	1
Good for flat coastal walking in Northern Ireland	2	2	2
Untouched and wild	3	3	3
Access issues for walkers	4	4	4
Steeped in history	5	5	5
Great all round destination (walking, accommodation, food and drink and other activities)	6	6	6
Not much else to do except walk	7	7	7
Too many other walker and/or tourists in the area	8	8	8
Don't know / not sure	9	9	9

Showcard D3

D3 To what extent do you agree or disagree with the following statements in relation to Northern Ireland?

SINGLE CODE ACROSS EACH ROW

READ OUT

	Agree strongly	Agree	Neither agree nor disagree	Disagree	Disagree strongly	Didn't Use/Don't Know
There is appropriate accommodation available close to walking areas	1	2	3	4	5	6
There is good local knowledge available at walking locations in NI	1	2	3	4	5	6
There is adequate information available about walks	1	2	3	4	5	6
There is appropriate car parking at the start of walks	1	2	3	4	5	6
There is appropriate information at the start of walks	1	2	3	4	5	6
There is appropriate signage and way marking	1	2	3	4	5	6
Walks are well maintained	1	2	3	4	5	6
Walking does not contribute to the erosion of the natural environment	1	2	3	4	5	6
There is good access to the land for walking	1	2	3	4	5	6
There is good availability for off-road walking	1	2	3	4	5	6

D4 In your opinion, what aspect of walking in Northern Ireland needs most improvement?

RECORD VERBATIM – PROBE

Thank and record contact information and permission to recall on front page