



Ring of Gullion

Visitor Participation Survey

Report prepared for:

**Newry and Mourne District
Council**

31 October 2013



Perceptive Insight
Jacob Peterson House
109 Bloomfield Avenue
Belfast
BT5 5AB

T +44 (0) 28 9073 7090
F +44 (0) 28 9073 7091
W www.pimr.co.uk

Therese Hamill
Newry and Mourne District Council
O'Hagan House
Monaghan Row
Newry
BT35 8DJ

30th October 2013

Dear Therese

Please find enclosed our draft report detailing the findings from the research conducted with visitors to the Ring of Gullion and tourism providers located in the area.

We have enjoyed working with you on this project and hope that you have found the findings beneficial. If you require any further information please do not hesitate to contact me on 028 9073 7090 or maureen.treacy@pimr.co.uk.

Warm regards

A handwritten signature in black ink that reads 'Maureen Treacy'.

Maureen Treacy
Managing Director

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1. Executive summary

Newry and Mourne District Council commissioned Perceptive Insight Market Research to undertake research to explore the perceptions of visitors and local tourism providers in relation to the Ring of Gullion. Responses from the surveys will be used to:

- Inform future marketing campaigns;
- Develop existing facilities in the Ring of Gullion area; and
- Explore areas where investment may be required.

The study was undertaken by means of an on-site face to face survey with 307 visitors to the Ring of Gullion area and a telephone survey with 16 tourism providers in the area.

This section summarises the key findings from each survey.

Key findings from visitors

Respondent profile

- Of the 307 visitors interviewed, 43% were male and 57% were female.
- Compared to the general population visitors were more likely to be male, aged 26 to 55 and ABC1 socio economic group.
- Over half (54%) reside in Northern Ireland. Of these:
 - 32% were from Armagh;
 - 29% were from Down; and
 - 25% were from Antrim.
 - The remaining respondents reside elsewhere in Northern Ireland.
- A further 30% came from the Republic of Ireland. Of these, over one third reside in South Louth (35%), 25% in Dublin and 11% in Meath.
- 16% of visitors came from outside the island of Ireland.
 - Almost half (48%) were from elsewhere in UK.

Reason and nature of visit

- 39% indicated that their main reason for visiting the Ring of Gullion was to use the playground. Other commonly cited reasons for visiting the area included:
 - To go walking (34%);
 - To attend an event or festival (24%).
- 60% of visitors stated that it was their first time visiting the area.
 - Of the 124 respondents who have been before, almost one quarter (23%) said they visit the area more frequently than once every six months.
- 28% indicated they were staying one or more nights away from home while visiting Ring of Gullion. Of these:
 - 57% were staying with friends or family;
 - 24% were staying in a hotel or bed and breakfast (i.e. serviced accommodation);
 - 9% at a caravan/camping site; and

- 9% in self catering or other accommodation.
- Visitor parties ranged in size from one person to more than 10 people. Half of respondents indicated that they were travelling in a group of between three to five people.
- 58% of respondents anticipated spending between £1 and £20 during the course of their visit while 8% estimated spending over £60. The average spend per person was £25.53.
 - The breakdown of spending shows that the highest level of spend was on transport and travel, with an estimated average spend per person of £10.30.

Service provision and facilities

- Survey findings reveal that visitors are mainly positive about the facilities in the Ring of Gullion area. The majority expressed satisfaction with the:
 - Cleanliness of the site (95%);
 - Car parking (88%); and
 - Toilet facilities (76%).
- Over three quarters (77%) indicated that they were very or quite satisfied with the availability of pubs/cafes/restaurants/coffee shops in the area. A further 76% expressed satisfaction with the quality of such establishments.
- Around half of visitors reported that they were satisfied with the walking routes/footpaths (56%) and playground (50%).
- Aspects deemed to be less satisfactory included signage to the Ring of Gullion area and information boards at locations.

Information and resources

- The main method by which visitors had heard about the Ring of Gullion area was through family and friends (74%). A much smaller proportion (16%) said they heard about the area on the internet/Ring of Gullion website.
 - The majority of those who have accessed the Ring of Gullion website indicated that they were quite or very satisfied with the site (80%).
 - However, no visitors to the website have downloaded the audio tours.
- Over three fifths (61%) of visitors expressed a desire for more information. Of these:
 - 49% requested information via the newspaper;
 - 42% through the radio/TV;
 - 23% through promotional leaflets/materials; and
 - 22% at Tourist Information Centres.

Looking ahead

- Respondents were highly positive about their future intentions to return to the Ring of Gullion area, with 93% indicating that they will return. A further 97% stated that they would recommend the Ring of Gullion to family/friends.
- When asked which factors would encourage them to return to the area, two fifths stated that they were satisfied with the Ring of Gullion, and thus require no further incentive to encourage them to return or stay longer.
- Over one quarter (26%) said the provision of more festivals/events would encourage them to stay longer.

Key findings from tourism providers

This section summarises the key findings from the survey of 16 tourism providers. Please note that due to the low base number, the findings are presented by count rather than percentage.

Tourism provider profile

- Business profiling revealed that almost half of those surveyed were holiday cottages, while two were hotels and two were pubs. The remainder of respondents included:
 - A café/restaurant;
 - Activity centre;
 - Golf club; and
 - Farm.
- Seven of the 16 tourism providers have been trading in the Ring of Gullion for more than 10 years, while six have been operational for between 6 to 10 years. Only one has been trading for less than two years.
- Respondents provided mixed feedback in relation to the number of visitors to the Ring of Gullion in the last three years. Four respondents thought visitors had increased in the area. In contrast, half of respondents felt visitor numbers have decreased in the last three years.

Service provision and facilities

- Similarly to responses to the visitor survey, tourism providers were most likely to express satisfaction with the playground (12); cleanliness of the area (10); and walking routes/paths (10).
- The most commonly reported areas of dissatisfaction were in relation to the cycling paths (10), festivals/special events (9) and toilet facilities (9).

Information and resources

- Respondents were asked to comment on where they obtain information about the Ring of Gullion. Half indicated that they gather information from Tourist Information Centres. Other sources of information include the:
 - Newry and Mourne Council website;
 - Newspaper/magazine articles.
- The survey revealed mixed satisfaction amongst tourism providers in relation to the marketing of the area. Half stated that they were satisfied, while the remaining half expressed dissatisfaction with the way in which the area is currently marketed. The following comments provide some insight into respondents' dissatisfaction:
 - There is insufficient signage/directions (3 comments);
 - The Tourism Board should do more to promote the Ring of Gullion (2 comments).
- Five respondents indicated that they currently host events for visitors to the Ring of Gullion.
 - Almost all such respondents (4) indicated that they use the Ring of Gullion website to promote events.

Promoting the Ring of Gullion area

- Findings reveal that the majority of respondents (13) have been provided with booklets and materials to promote the Ring of Gullion area.
- Seven businesses stated that they would like to become more involved in promoting the Ring of Gullion. In order to do so, respondents requested the following:
 - A wider range of promotional materials (5 comments);
 - General information about the Ring of Gullion (4 comments); and
 - Training to enable respondents to become more actively involved in promoting the area (3 comments).
- 14 respondents stated that they would make an effort to display leaflets if they were sent directly to their premises.

Looking ahead

- Five tourism providers plan to increase business activity in the Ring of Gullion area over the next year. Comments reveal that respondents intend to do so through property extension and the facilitation of promotional campaigns.
- Respondents provided the following suggestions to encourage increased tourism to the area:
 - Ensure more advertising/promotion of the Ring of Gullion (4 comments);
 - Consider providing further accommodation facilities for visitors to the area (3 comments).

2. Introduction

The Ring of Gullion is a unique geological landform, unparalleled elsewhere in Ireland or the UK and was the first ring dyke in the world to be geologically mapped. The area sits to the North of the Northern Ireland border with the Republic of Ireland and it shares many landscape characteristics with the adjacent area of County Louth.

The Ring of Gullion is one of nine Areas of Outstanding Natural Beauty (AONB) in Northern Ireland. The area is rich in archaeological and historical features, and attracts many visitors, drawn by the opportunities to walk the heather clad uplands of Slieve Gullion, to explore its archaeology, its many cultural events and opportunities for study, and to enjoy the scenic Slieve Gullion Forest Drive.

Background

In recent years steps have been taken to enhance tourism in the area, by improving the tourism infrastructure, accessibility and marketing of the South Armagh area.

New tourism initiatives have included:

- A new website through the South Armagh Tourism Initiative;
- Direct mail to archaeology and geology departments in universities, promoting field visits to the area;
- Genealogy archive at Ti Chulainn Cultural Centre;
- Political tours;
- Lake survey to establish angling potential;
- Establishing Camlough fishing jetties and Newry Canal fishing stands;
- Introducing Oriel Angling-charter boats;
- Electrification of lock gates on Newry Ship Canal;
- Guided tours; and
- Green accreditation scheme for tourism providers.

Furthermore, the Ring of Gullion AONB has hosted many countryside recreation events, including:

- The Crooked Lake Triathlon (Camlough Lake);
- Wee Binnian Walking Festival;
- South Armagh Walking Festival;
- Mullaghbane half marathon;
- 'Spin of Gullion' family cycle event;
- Slieve Gullion Fell Race;
- Tour of South Armagh (cycling); and
- Charity walks.

Terms of reference

Perceptive Insight was commissioned to conduct a visitor participation and tourism provider survey for the Ring of Gullion area.

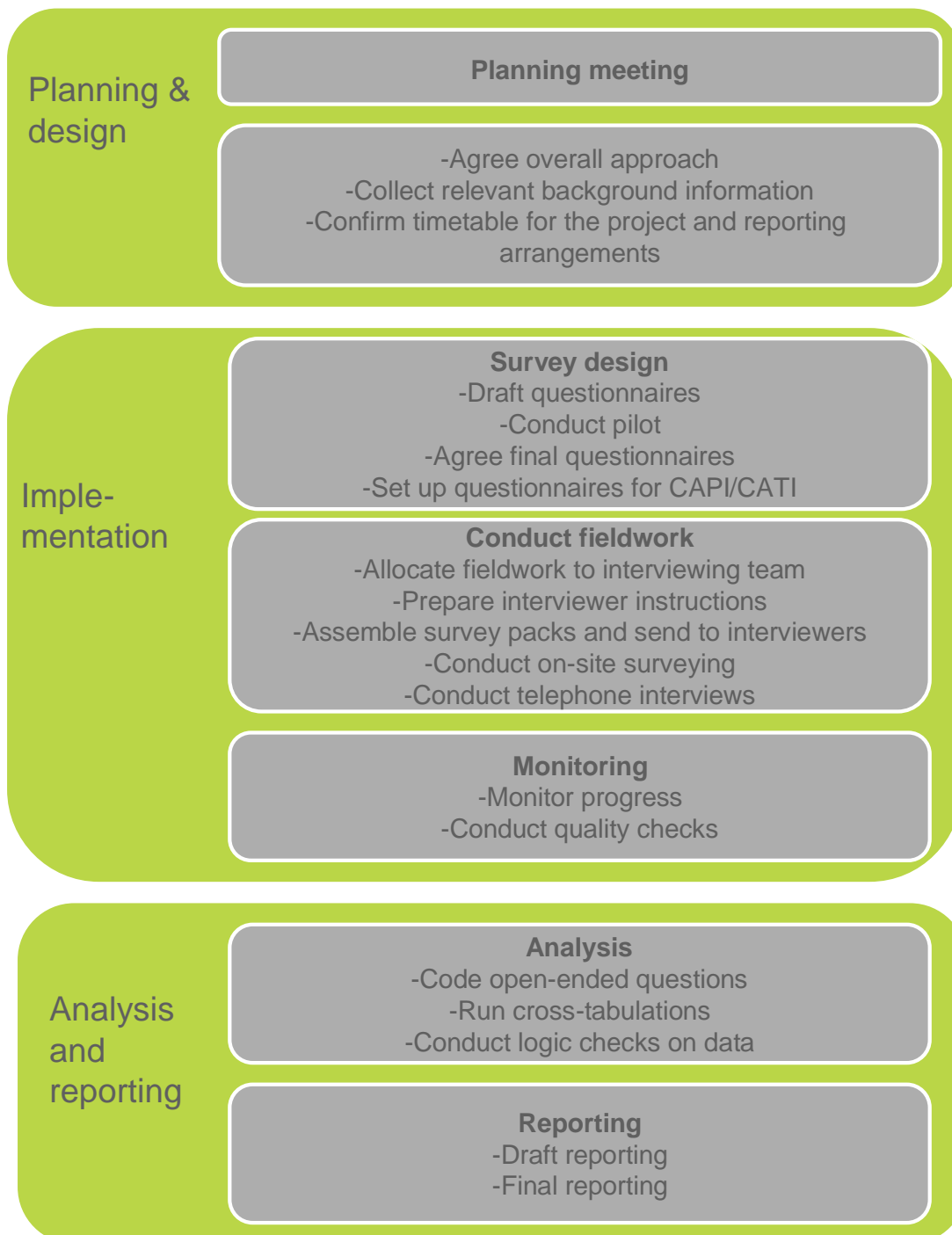
Specifically, this research evaluates the profile of visitors and tourism providers in the Ring of Gullion area, their motivational and behavioural characteristics, and their attitudes in terms of the services on offer.

The information from this study will be used to inform future marketing campaigns, develop existing facilities and explore funding opportunities.

In the sections that follow we detail our approach to the research and key findings from the surveys.

3. Methodology

Below we have depicted the key tasks that were undertaken during the implementation of the research. The paragraphs, which follow, detail the steps that were undertaken at each stage of the project.



Project planning

An initial planning meeting was held with the Newry and Mourne District Council and the Perceptive Insight teams. At this meeting the approach to the study, the timetable and other planning issues were discussed and agreed.

Survey of visitors

The aim of this stage of the research was to gain a comprehensive overview of the demographic, motivational and behavioural characteristics of visitors.

Sample design

The quantitative survey was conducted on-site with 307 visitors to the Ring of Gullion area. A schedule was established to ensure that interviewing took place at a range of locations and at various times of the days and days of the week. Interviewing took place between the 4th August and the 13th October 2013. While at each location interviewers were instructed to approach every nth visitor to invite them to participate in the study. Those classed as local to the area were excluded from the survey.

Questionnaire design

Drawing on our extensive experience in questionnaire design, we worked in partnership with Newry and Mourne District Council to design a questionnaire. The survey included a comprehensive list of demographical questions which will fully inform Newry and Mourne District Council of the profile of visitors to the various site locations, the motivations for visit and the views of the services provided. When designing the questionnaire we took care to ensure that the questions were balanced, without ambiguity and did not lead the respondent to answer in a certain way. A concise pilot study was conducted to test and refine the questionnaire prior to the main fieldwork being implemented.

Survey implementation

Newry and Mourne District Council provided Perceptive Insight with an overview of the potential survey locations in the Ring of Gullion area. In addition we were made aware of a number of events that would attract visitors to the area. Once the pilot was carried out and with local knowledge from our trained and experienced interviewing team, the final locations were chosen. The following table summarises the number and percentage of interviews that were conducted at each location.

¹ It should be noted that in some charts percentages have been rounded to 0 decimal places; therefore, when the percentages are totalled it does not always add up to 100%.

Location of interviews	Number	Percentage
<i>Base: All respondents</i>		
	307	307
Slieve Gullion	200	65%
Ti Chulainn	1	0%
Camlough Wood	1	0%
The Welcome Inn, Forkhill	2	1%
Murphy's bar/Crossmaglen Square hotel/tourist facility	10	3%
Camlough lake	42	14%
Bus trip	10	3%
Wee Binnian walking festival	23	7%
Red squirrel fun day	12	4%
Ring of Gullion spa	6	2%
Total	307	100%

Survey of tourism providers

The aim of this stage of research was to provide an understanding of the needs of tourist providers.

Sample design

A telephone survey was conducted with 16 tourism providers in the Ring of Gullion area. Newry and Mourne District council provided Perceptive Insight with a data base of twenty tourism providers in the area. All were contacted and asked to participate in the telephone interview.

Questionnaire design

Similarly to the visitor participation survey, we worked with Newry and Mourne District Council to develop a 5-6 minute questionnaire to assess the needs and experiences of tourism providers in the Ring of Gullion.

Survey implementation

The calls were made from our on-site CATI (computer assisted telephone interviewing) suite. The calls were made by our team of trained and experienced interviewers, who are situated on-site in our offices in Belfast. The interviewing team were briefed on the study and were allowed to practice the questionnaire prior to live interviewing. Most interviewing took place during the day although we also accommodated interviewing in the early evening to ensure we were able to contact a wide spread of respondents.

Data processing and analysis

The data from both surveys were inputted into our specialist survey software package for analysis. The data was then cleaned and any open ended responses were coded. Data tables were produced detailing the response to each question.

4. Key findings from visitors

In the following section we present the key findings from the survey conducted with visitors to the Ring of Gullion area. The results are presented under the following headings:

- 4.1 Visitor profile;
- 4.2 Reason and nature of visit;
- 4.3 Service provision and facilities;
- 4.4 Information and resources;
- 4.5 Looking ahead.

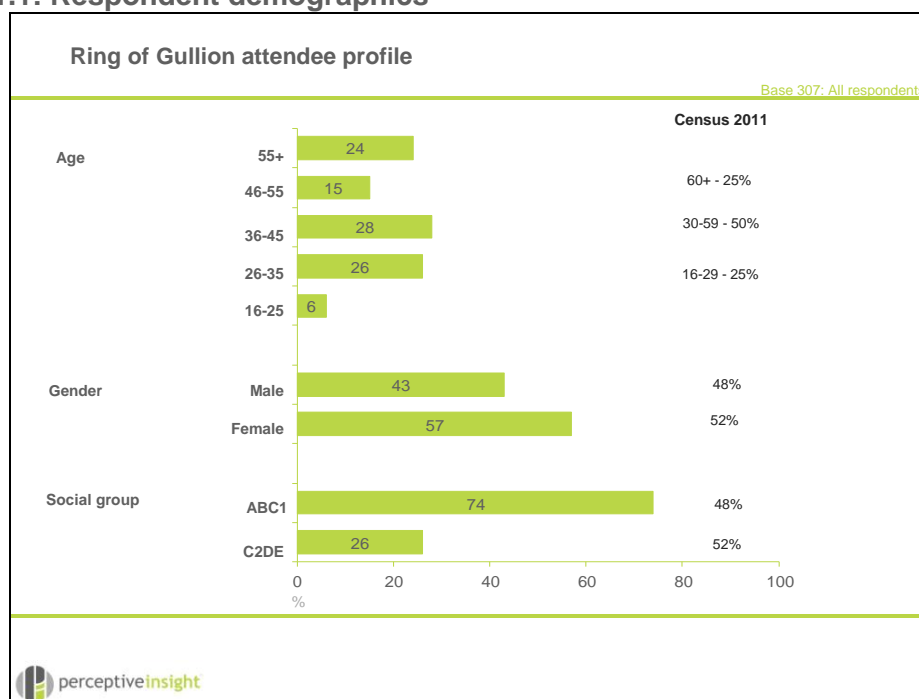
4.1 Visitor profile

Figure 4.1.1 highlights the profile of visitors to the Ring of Gullion area. Of the 307 interviews achieved, 43% were male and 57% were female. In terms of socio-economic grouping, almost three quarters (74%) were classed as ABC1 while just over one quarter (26%) were C2DE.

Six percent were aged 16 to 24 years old, 26% aged 26 to 35 years old, 28% aged 36 to 45, 15% aged 46 to 55 and 24% were aged 55 plus.

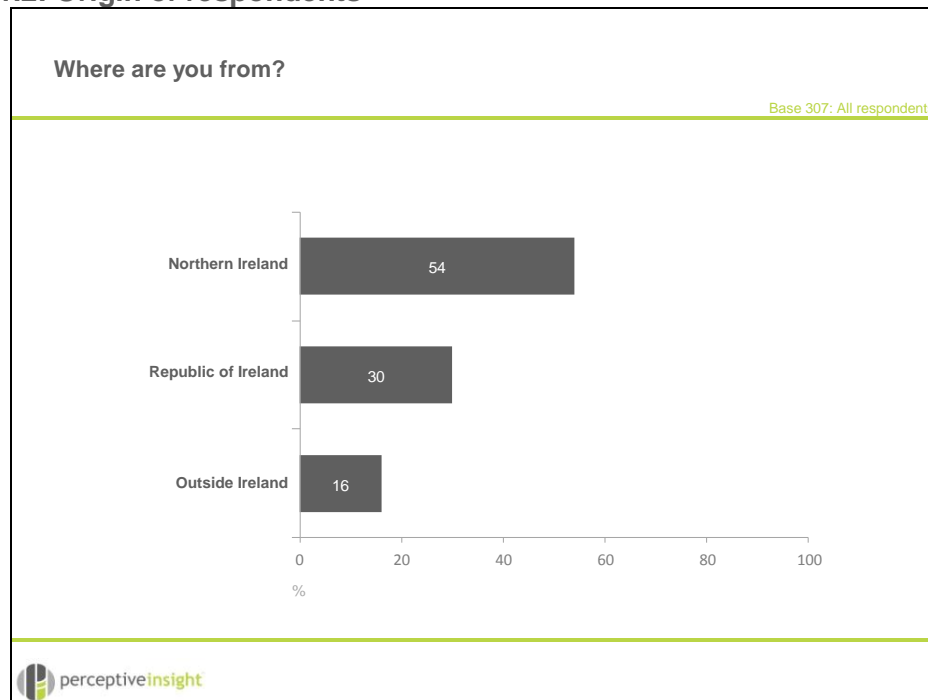
When compared to demographic data from Census 2011, it appears that those visiting the Ring of Gullion area are more likely to be females, ABC1 socio economic group and aged between 30 and 59.

Figure 4.1.1: Respondent demographicsⁱ



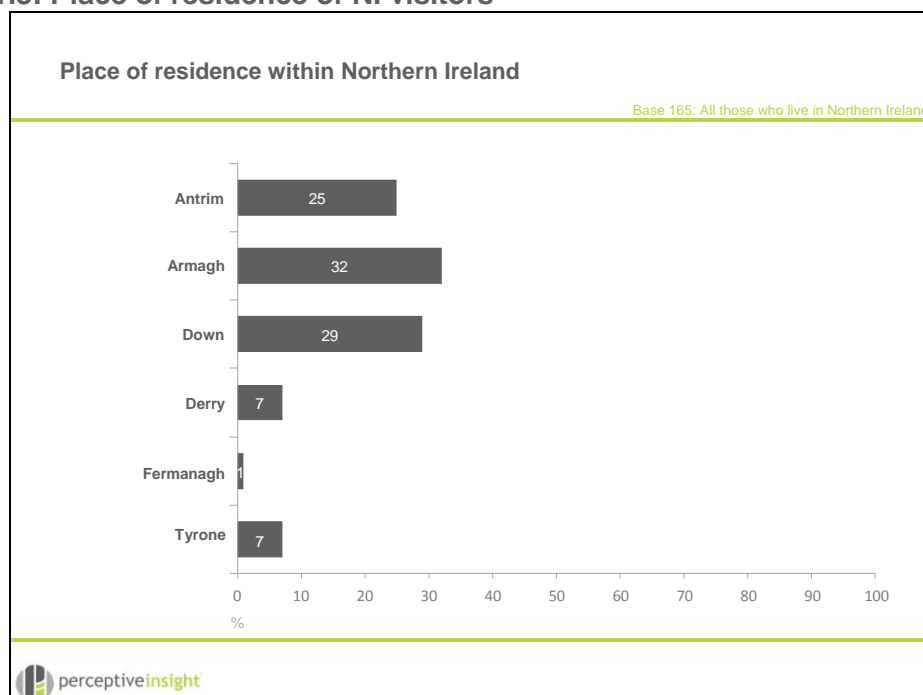
Just over half of the visitors to the area (54%) were from Northern Ireland, 30% were from the Republic of Ireland and 16% from outside the island of Ireland.

Figure 4.1.2: Origin of respondents



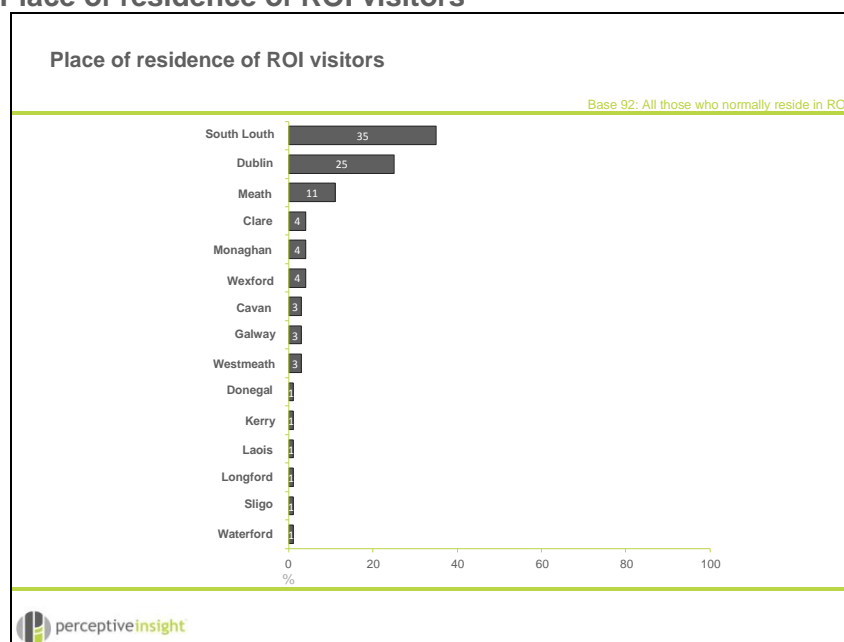
Of the 165 respondents that came to visit from within Northern Ireland, just under one third (32%) were from Co. Armagh, 29% from Co. Down, one quarter (25%) from Co. Antrim, 7% each from Co. Londonderry and Co Tyrone and 1% from County Fermanagh.

Figure 4.1.3: Place of residence of NI visitorsⁱ



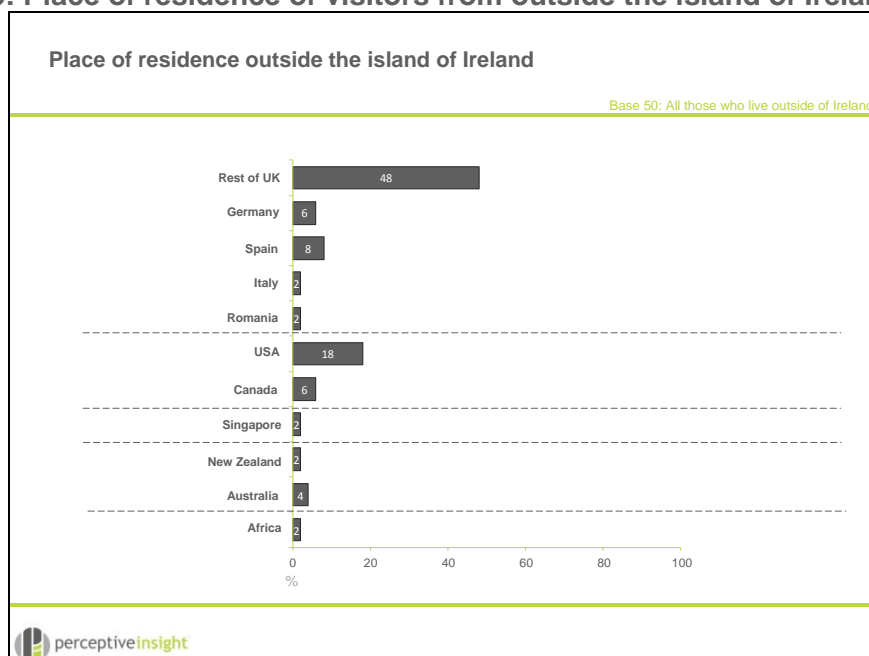
Of the 92 respondents (30%) that came to visit from the Republic of Ireland, the majority came from South Louth¹ (35%), Dublin (25%) and Meath (11%).

Table 4.1.4: Place of residence of ROI visitorsⁱ



Fifty visitors came from outside the island of Ireland and of these almost half (48%) were from the rest of the UK. 18% visited from the rest of the EU (including Germany 6%, Spain 8%, Italy 2% and Romania 2%), 18% from the USA, 6% from Canada, 4% from Australia and 2% from Singapore, New Zealand and Africa.

Figure 4.1.5: Place of residence of visitors from outside the island of Ireland

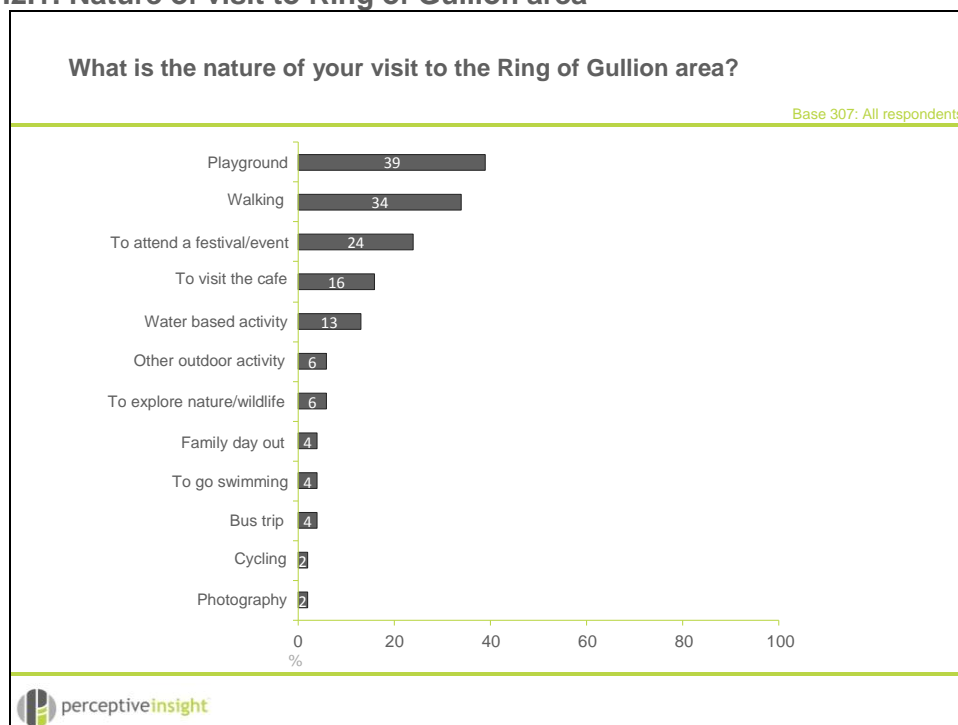


¹Those from North Louth were excluded from the survey due to their proximity to the Ring of Gullion.

4.2 Reason and nature of visit

39% of respondents indicated they were visiting the Ring of Gullion area for the playground, 34% said the nature of their visit to the area was for walking, while almost one quarter (24%) confirmed that they were visiting to attend an event or festival.

Figure 4.2.1: Nature of visit to Ring of Gullion area



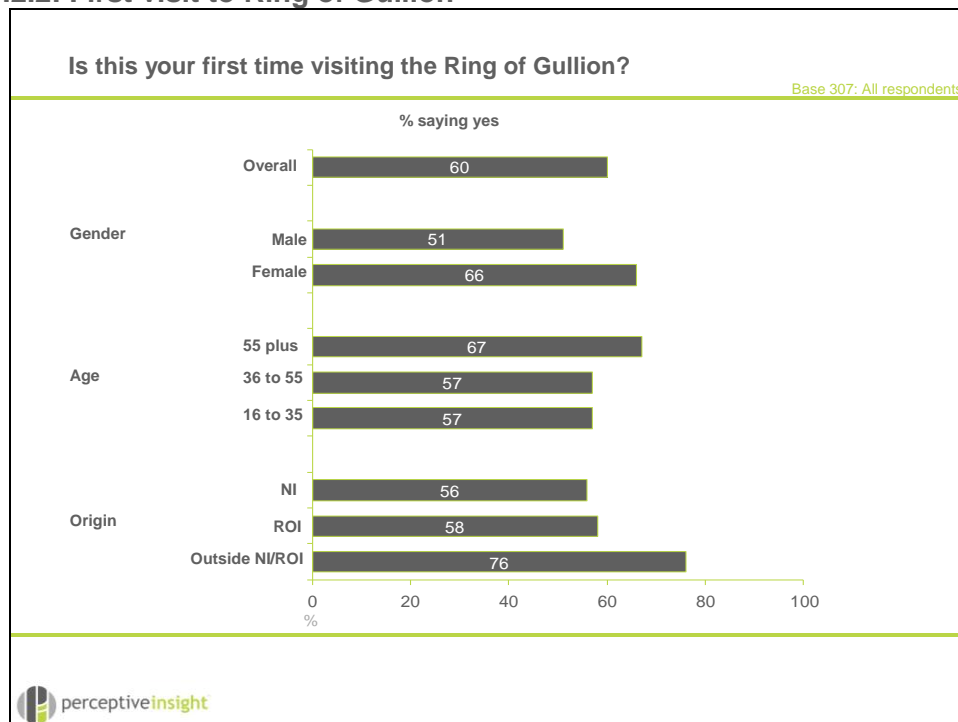
The following table provides a breakdown of the nature of the visit by age and place of residence. It shows that older people (aged 55+) and those from outside the island of Ireland are more likely to be drawn to the Ring of Gullion for walking and to explore wildlife. Those aged 36-54 are more likely to be attracted to the playground, and younger visitors are more likely to be in the area to attend a festival or event.

Table 4.2.1: Nature of visit by age and origin

What is the nature of your visit to the Ring of Gullion area?	Overall	Age			Origin			
		16 to 35	36 to 54	55 plus	NI	ROI	Outside NI/ROI	
	Base	307	98	134	75	165	92	50
Playground	39%	38%	51%	19%	42%	38%	30%	
Walking	34%	28%	31%	45%	32%	32%	44%	
To attend festival/event	24%	37%	20%	13%	22%	28%	22%	
To visit the café	16%	15%	15%	19%	13%	18%	22%	
Water based activity	13%	24%	10%	4%	12%	20%	6%	
Other outdoor activity	6%	6%	5%	8%	4%	11%	4%	
To explore nature/wildlife	6%	1%	4%	16%	5%	4%	10%	
Family day out	4%	4%	2%	8%	4%	7%	2%	
Swimming	4%	8%	2%	-	2%	7%	2%	
Bus trip	4%	1%	1%	11%	4%	3%	2%	
Cycling	2%	1%	3%	1%	3%	1%	-	
Photography	2%	2%	1%	3%	1%	1%	4%	

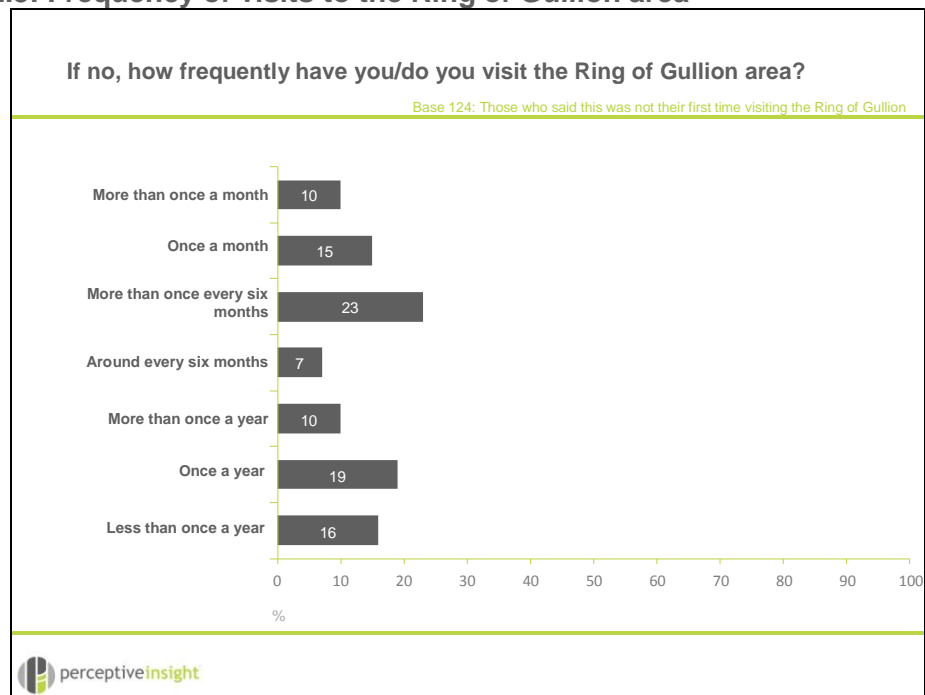
Three out of five (60%) indicated this was their first visit to the area. Female visitors (66%), those aged over 55 (67%) and visitors from outside the island (76%) were most likely to say this was their first visit to the area.

Figure 4.2.2: First visit to Ring of Gullionⁱ



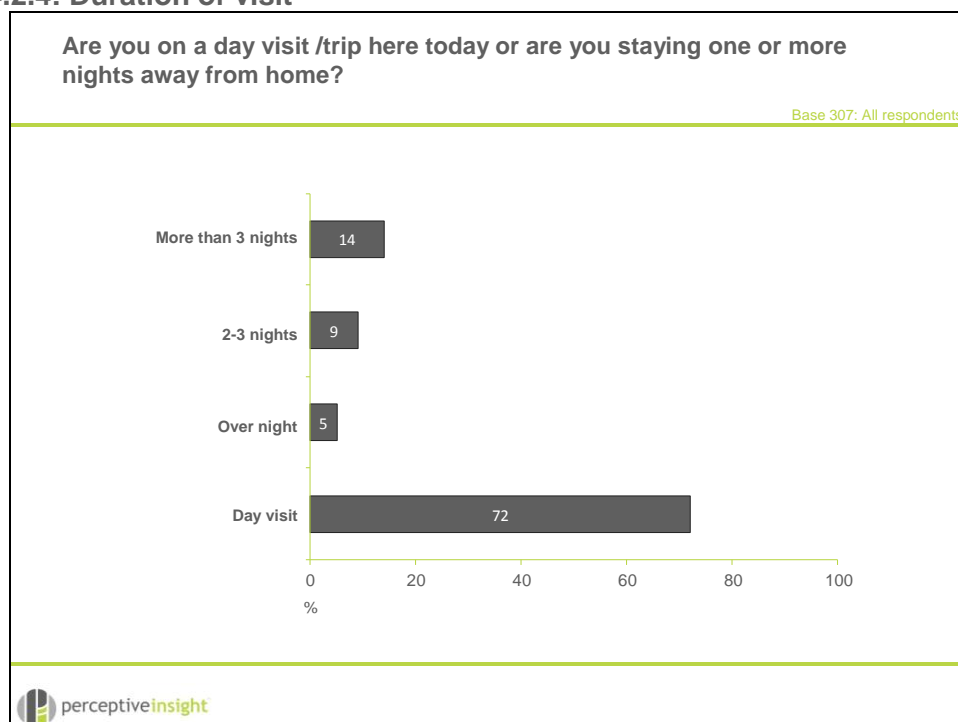
Respondents who indicated they had previously visited the Ring of Gullion were asked how often they visit the area. One quarter (25%) said they would visit the area more than once a month, while a further 40% commented they visited more than once a year. One in five (19%) reported visiting yearly and 16% said their visits were less frequent.

Figure 4.2.3: Frequency of visits to the Ring of Gullion area



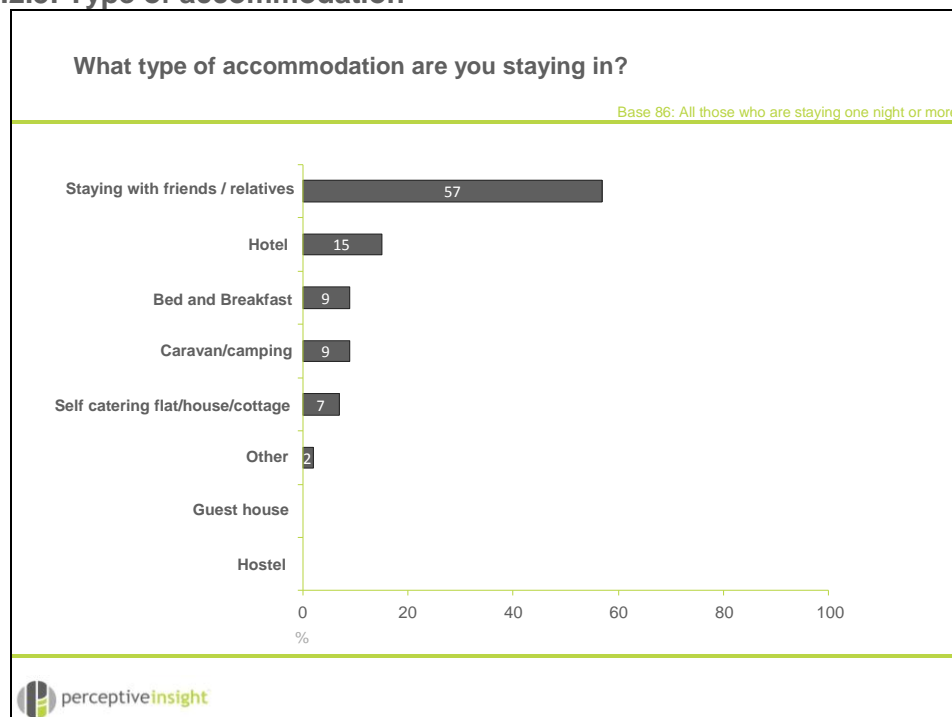
The majority of visitors (72%) were on a day trip to the Ring of Gullion, 5% stated they were staying overnight, 9% said they were staying in the area for 2 to 3 nights and over 14% were staying more than three nights.

Figure 4.2.4: Duration of visit



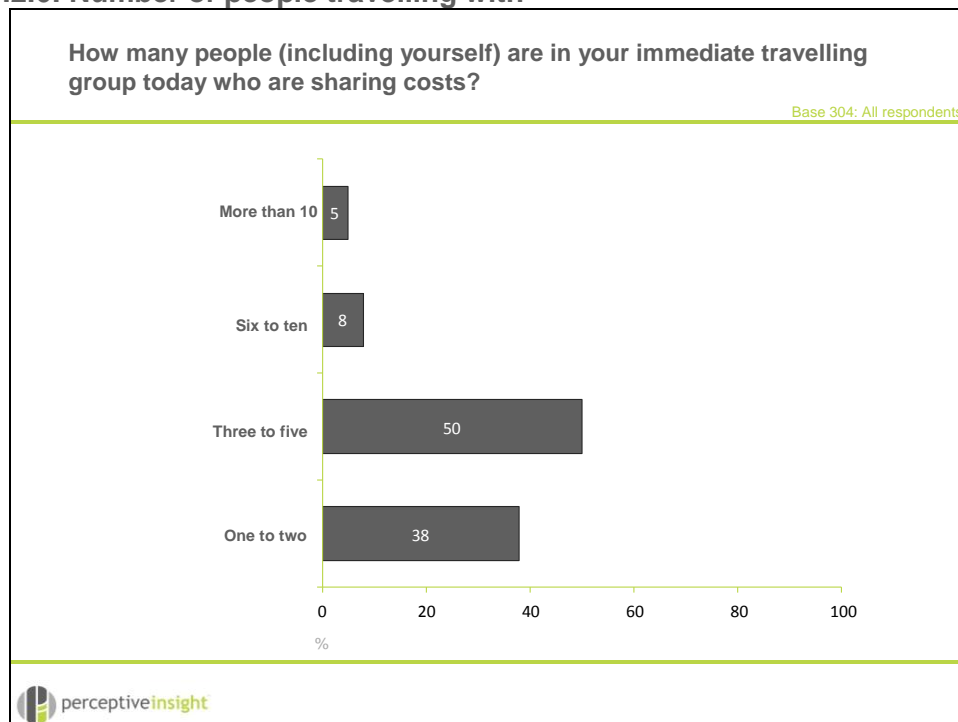
Visitors who were staying for one night or more were asked what type of accommodation they were staying in. Over half (57%) reported staying with friends or relatives, 15% said they were staying in a hotel, 9% in a bed and breakfast, 9% in a caravan or camping and 7% in self catering accommodation. No one indicated they were staying in a guesthouse or hostel.

Figure 4.2.5: Type of accommodationⁱ



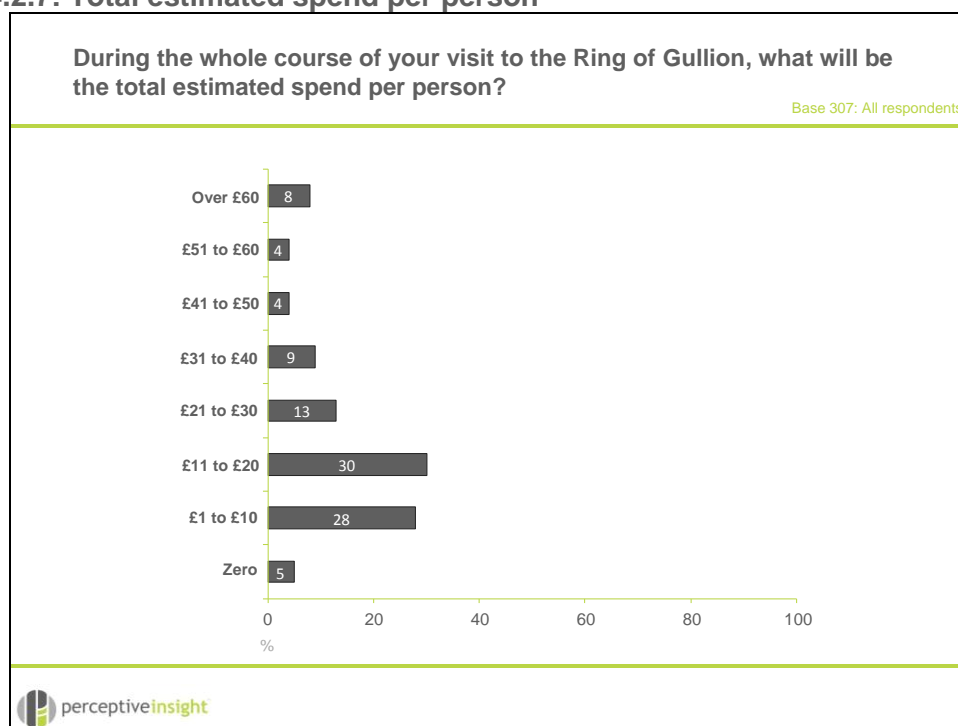
Respondents were asked how many people were making the visit with them. 38% indicated they were travelling alone or with one other person, half (50%) were travelling with parties of 3 to 5 people, while 13% were travelling as part of a larger group size.

Figure 4.2.6: Number of people travelling with



Those interviewed were asked to estimate how much they would spend during the course of their visit. While one in twenty (5%) anticipated spending nothing, 58% estimated a spend of up to £20 and 38% thought their spend would be more than this. The average estimated spend per person was £25.53.

Figure 4.2.7: Total estimated spend per person



The following table provides a breakdown of spend by various items of expenditure. The highest level of spend was on transport and travel with an estimated average spend per person of £10.30. The second highest expense while visiting the area was on food and drink, with an estimated average spend per person of £9.18.

Average expenditure per person on accommodation, £2.65, was low due to the high number of day trippers to the area. However for those who stayed for one night or more, and paid for accommodation, the average cost was £21.89 per person. The average spend per person staying in a hotel, guest house, B&B and hostel was £29.52. While for those camping/caravanning or staying in self catering accommodation the average price was £13.21.

Table 4.2.2: Average expenditure per person per day

	Average expenditure per person per day (£)
<i>Base</i>	<i>307</i>
Accommodation ²	£2.65
Meals, drinks, groceries	£9.18
Transport and travel	£10.30
Retail shopping	£1.23
Admission/entry fees/other leisure spending	£2.17
Other	£0.12
Total average spend per person	£25.53

Table 4.2.3: Average expenditure per person per day on accommodation

	Average expenditure per person per day on accommodation (£)
Average spend on paid accommodation by those who had an overnight visit (per person)	£21.89
Average spend on hotels, guest houses, B&Bs, hostels (per person)	£29.52
Average spend on camping, caravanning, self catering flat/house/cottage (per party that participated)	£13.21

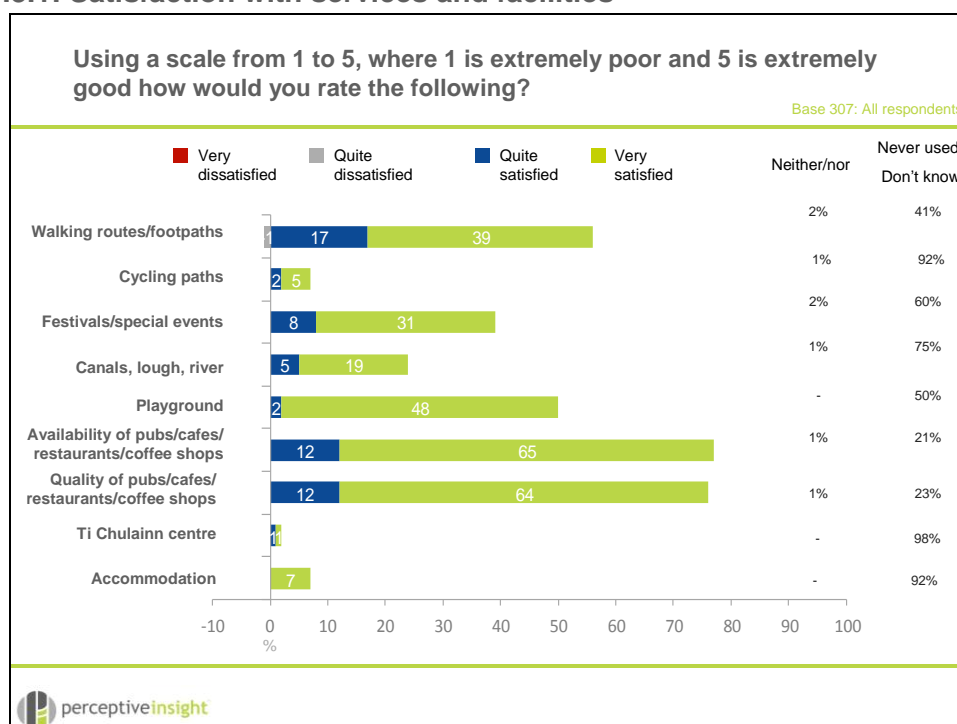
² Based on all visitors

4.3 Service provision and facilities

Visitors to the area were asked a series of questions to rate their experience of and satisfaction with service provision and facilities in the Ring of Gullion area. In general views on the facilities and services were positive.

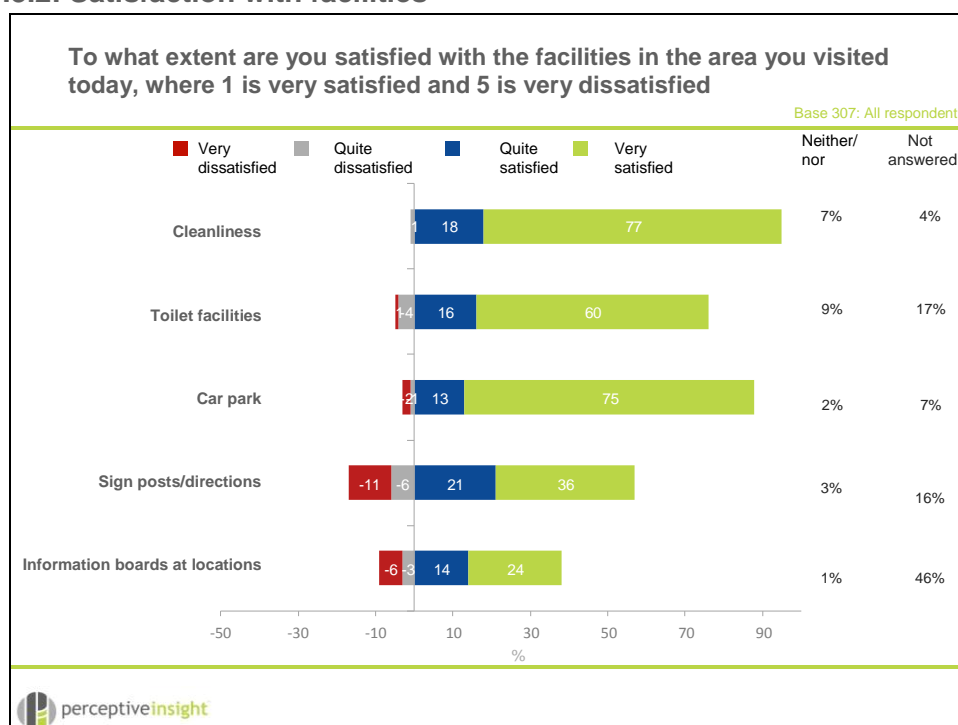
Visitors to the area were most likely to be satisfied with the food and drink services provided in the area. Over three quarters (77%) said they were very or quite satisfied with the availability of pubs/cafes/restaurants/coffee shops and 76% were very or quite satisfied with the quality. 56% of visitors were very or quite satisfied with the walking routes/footpaths and half (50%) were satisfied with the playground. There was little of evidence of dissatisfaction for any aspect of service provision.

Figure 4.3.1: Satisfaction with services and facilities



Visitors were asked the extent to which they were satisfied with a range of facilities in the Ring of Gullion area. They were most likely to say they were very or quite satisfied with the cleanliness (95%), car parking (88%), and the toilet facilities (76%). Visitors were less positive about sign posts/directions, with 17% saying they were very or quite dissatisfied, while 9% of visitors were also dissatisfied with information boards at locations.

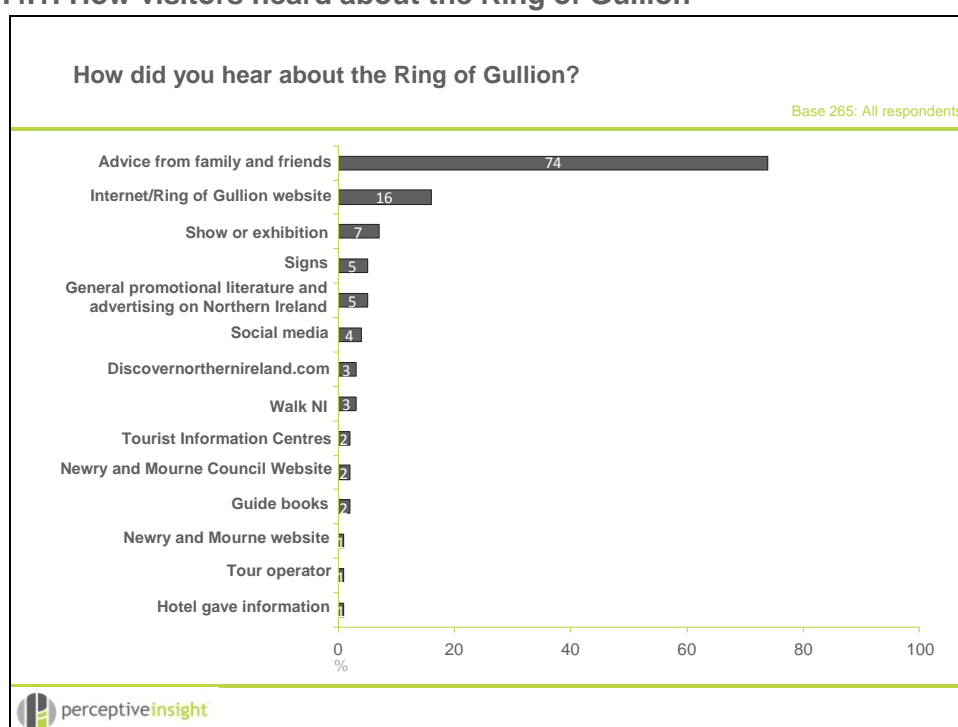
Figure 4.3.2: Satisfaction with facilities



4.4 Information and resources

The main method by which visitors heard about the Ring of Gullion was through 'advice from family and friends' (74%). A further 16% became aware of it through the internet or Ring of Gullion website and 7% through a show or exhibition.

Figure 4.4.1: How visitors heard about the Ring of Gullion



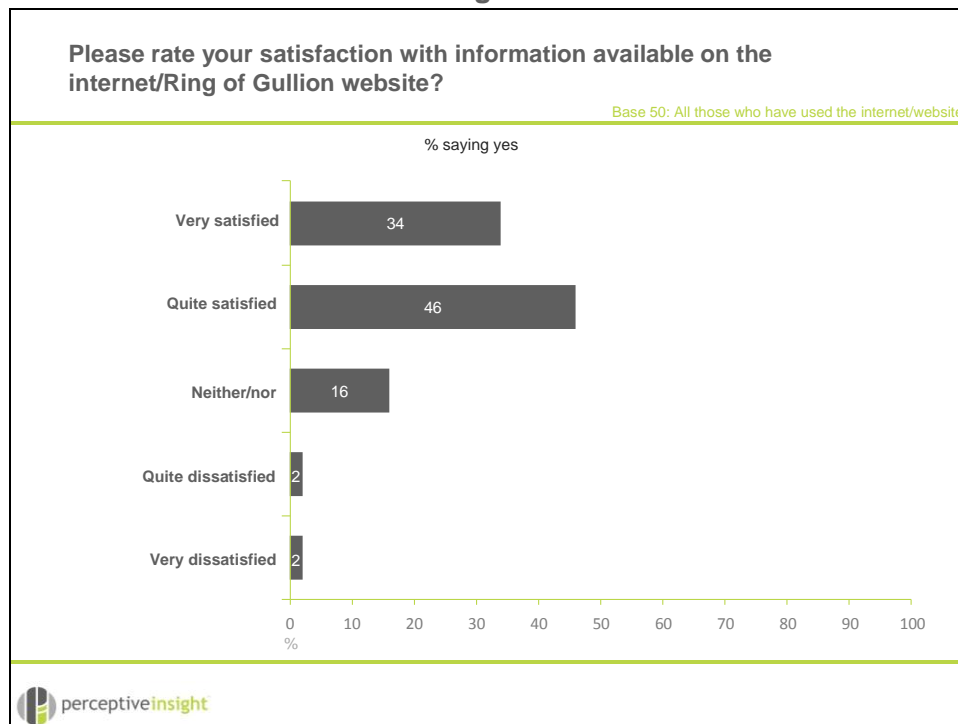
The following table provides a breakdown of how visitors heard about the Ring of Gullion by age and area of residence. While advice from family and friends is common for all, it shows that younger visitors (under 55) are more likely to use the internet for information, while older visitors are more likely to have heard through an event or exhibition (15%). Those from outside the island are more likely to have become aware of the area from promotional literature and tourism centres/websites.

Table 4.4.1: How visitors heard about the Ring of Gullion by age and origin

How did you hear about the Ring of Gullion?	Overall	Age			Origin		
		16 to 35	36 to 54	55 plus	NI	ROI	Outside NI/ROI
	<i>Base</i>	<i>307</i>	<i>98</i>	<i>134</i>	<i>75</i>	<i>165</i>	<i>92</i>
Advice from family and friends	74%	73%	78%	65%	76%	66%	80%
Internet/Ring of Gullion website	16%	17%	22%	5%	16%	20%	10%
Show or exhibition	7%	4%	4%	15%	6%	9%	4%
Signs	5%	7%	3%	5%	5%	7%	2%
General promotional literature and advertising on Northern Ireland	5%	3%	4%	8%	3%	4%	10%
Articles on newspapers/magazines	4%	6%	3%	4%	5%	3%	4%
Social media	4%	5%	2%	4%	4%	4%	2%
Discovernorthernireland.com	3%	2%	4%	3%	2%	2%	6%
Walk NI	3%	1%	5%	1%	4%	1%	2%
Tourist Information Centres	2%	1%	2%	4%	2%	1%	6%
Newry and Mourne Council website	2%	2%	2%	1%	2%	3%	-
Guide books	2%	1%	1%	4%	-	4%	2%
Newry and Mourne website	1%	1%	1%	3%	-	4%	-
Tour operator	1%	-	-	4%	-	-	6%
Hotel provided information	1%	-	1%	-	-	1%	2%

Those who had used the internet or website were asked their opinion of it. 80% of visitors were very or quite satisfied with the information available on the internet/Ring of Gullion website. Just 4% said they were dissatisfied and 16% were neither satisfied nor dissatisfied with information available.

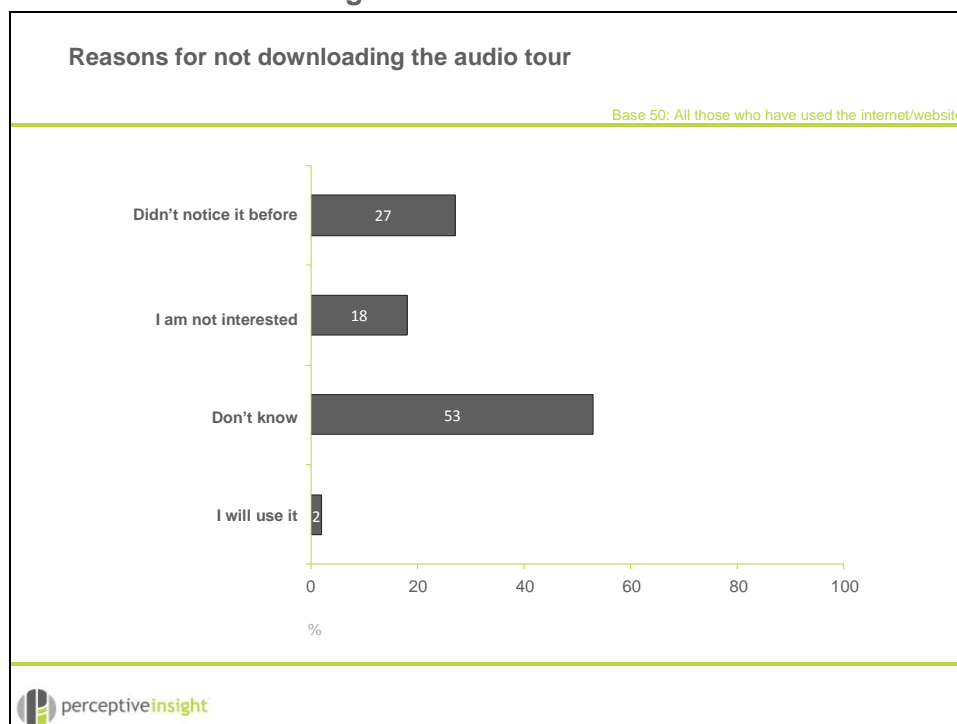
Figure 4.4.2: Satisfaction with internet/Ring of Gullion website



A further question was then asked to the 50 respondents who said they had used the internet/Ring of Gullion website to find out if they had ever downloaded the audio tours. It was found that no one had used this service.

The chart below shows the main reasons why visitors had never downloaded the tour. 27% had never noticed it before, 18% were not interested, and 53% said they did not know why they had never used it. Just 2% said they intend to download the tour.

Figure 4.4.3: Reason for not using the audio tour



Over three fifths of visitors (61%) thought that more information should be available about the Ring of Gullion area.

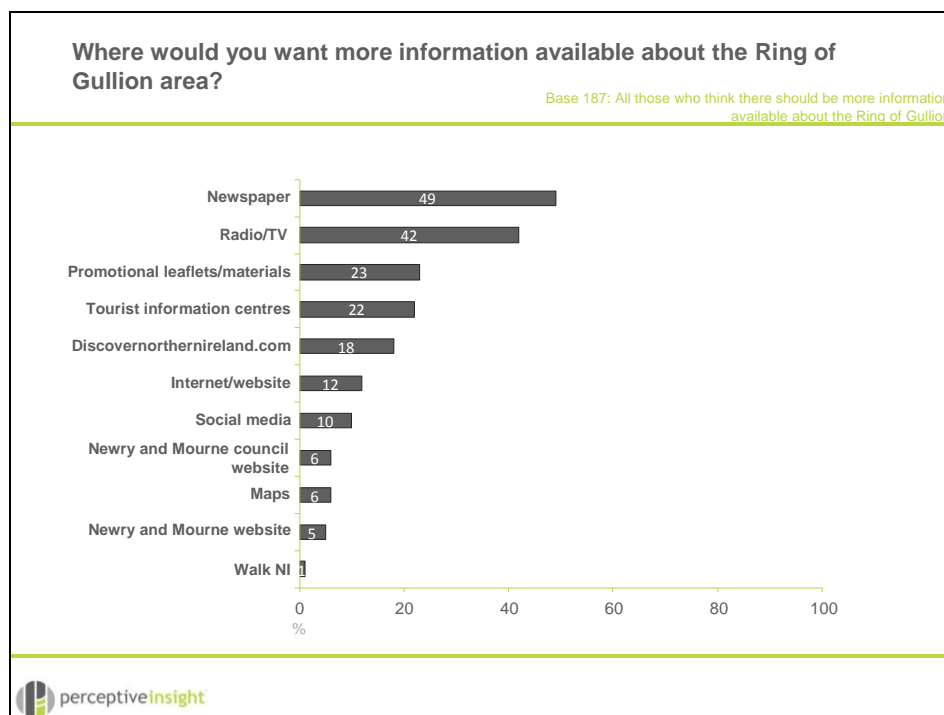
When analysed by gender, slightly more males (63%) than females (59%) thought that more information should be available. Visitors aged 36 to 55 (69%) and those from Northern Ireland (67%) were also more inclined to think more information should be made available.

Table 4.4.2: Information availability

Do you think there should be more information available about the Ring of Gullion area?	Overall	Gender		Age			Origin			
		Male	Female	16 to 35	36 to 55	55 plus	NI	ROI	Outside NI/ROI	
	Base	307	131	176	98	134	75	165	92	50
Yes	61%	63%	59%	50%	69%	61%	67%	58%	46%	
No	22%	21%	23%	31%	17%	19%	21%	23%	22%	
Don't know	17%	16%	18%	19%	14%	20%	12%	20%	32%	

The 187 visitors who wanted more information available about the Ring of Gullion were then asked where they would like this information to be made available. Almost half of visitors (49%) replied in newspapers, 42% on the radio/TV, 23% through promotional leaflets/materials and 22% thought more information should be made available from the tourist information centres.

Figure 4.4.4: Preference for the channels used to make visitor information available

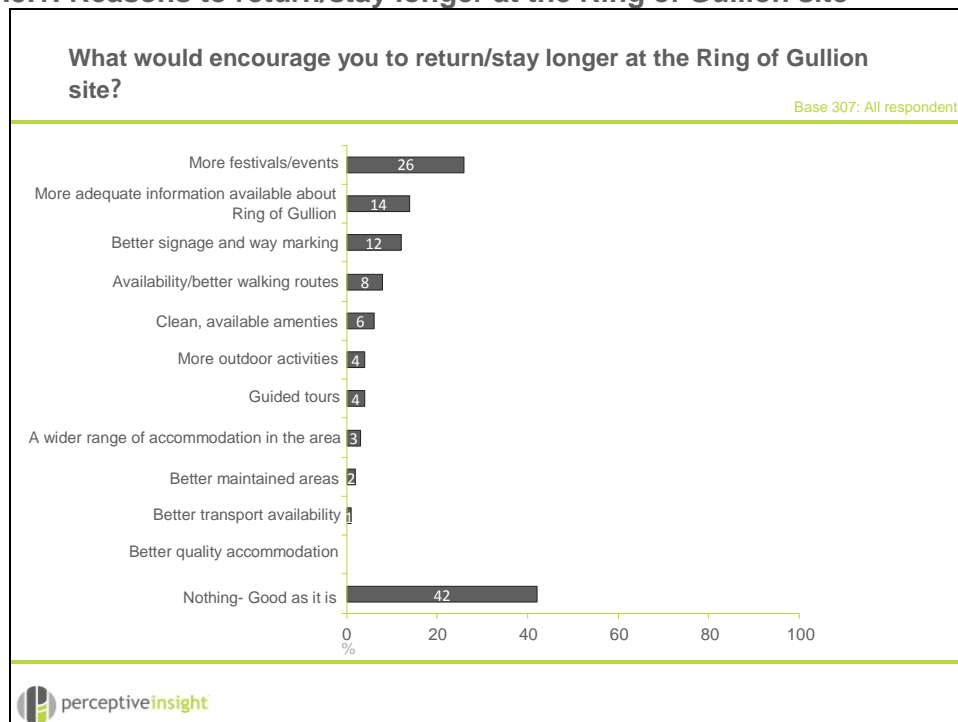


4.5 Looking ahead

Positively 42% of visitors commented that the Ring of Gullion site is good as it is and therefore nothing would need to be done to encourage them to return or stay longer.

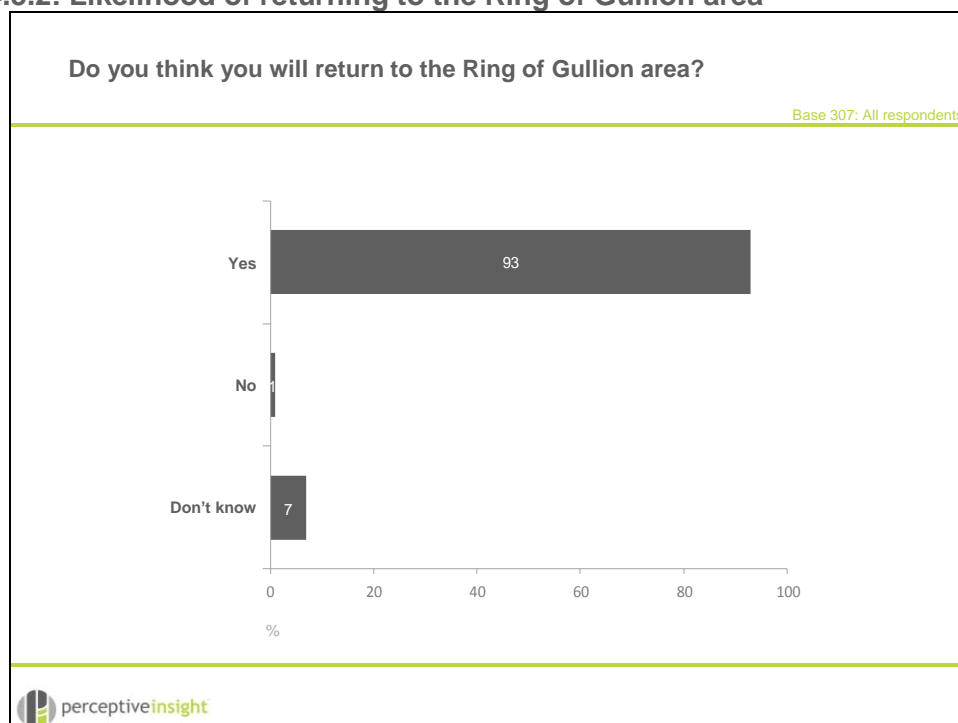
Just over one quarter (26%) said the provision of more festivals/events would encourage them to return to or stay longer in the area, 14% suggested more adequate information available about the Ring of Gullion, while 12% of visitors recommended better signage and way marking.

Figure 4.5.1: Reasons to return/stay longer at the Ring of Gullion site



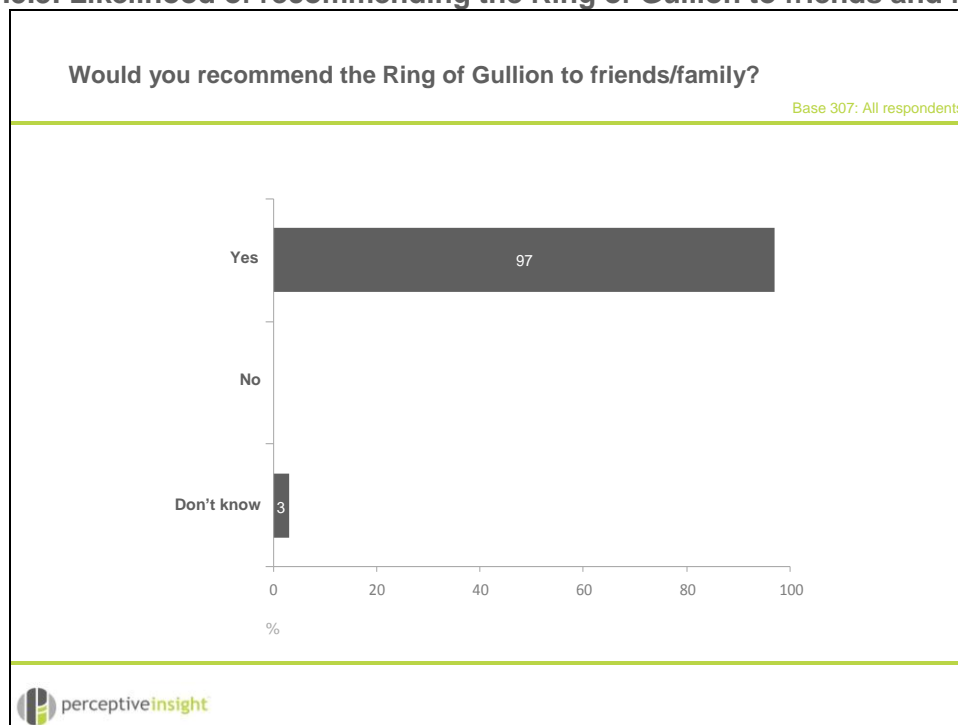
Visitors were asked if they thought they would be likely to return to the Ring of Gullion area. 93% of visitor's confirmed they intend to return, 7% said they were not sure, while only 1% did not think they would return.

Figure 4.5.2: Likelihood of returning to the Ring of Gullion areaⁱ



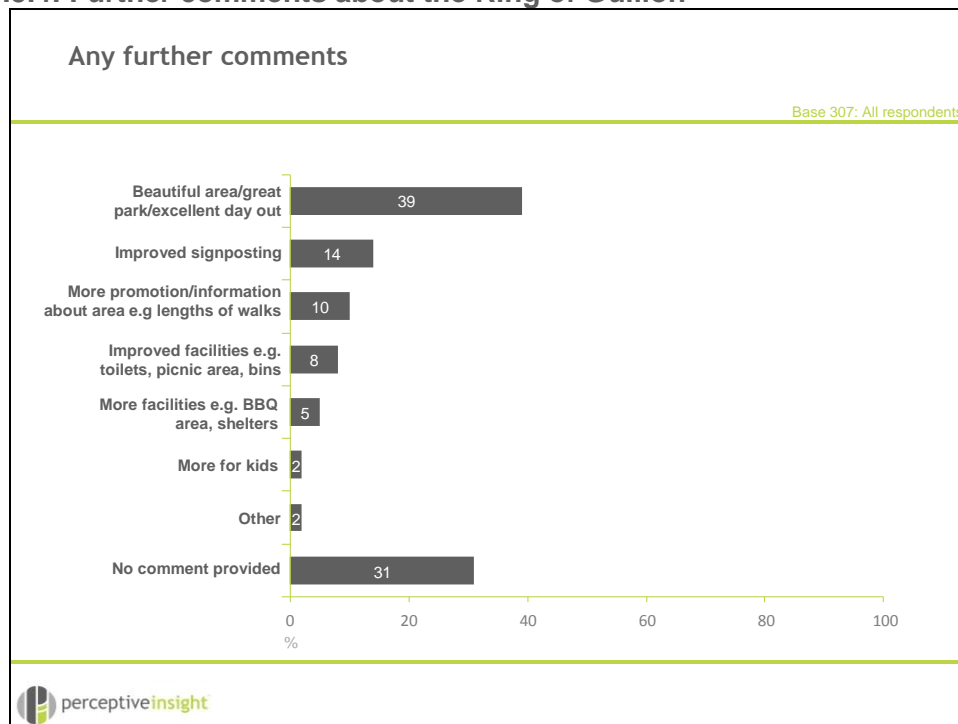
Visitors were then asked would they recommend the Ring of Gullion to friends or family. Almost everyone (97%) indicated they would recommend the Ring of Gullion, while only 3% said they didn't know and no one said they would not.

Figure 4.5.3: Likelihood of recommending the Ring of Gullion to friends and family



Finally visitors were asked if they had any further comments to make about the Ring of Gullion area. 39% of visitors provided positive comments saying that it is a beautiful area, great park and an excellent day out. However, some respondents suggested improvements including 14% of visitors who commented they would like improved signposting, 10% said they would like more promotional information about the area and 8% stated they would like improved facilities.

Figure 4.5.4: Further comments about the Ring of Gullion



5. Key findings from tourism providers

In order to gauge an understanding of the needs and experiences of tourist providers in the Ring of Gullion area a telephone survey was conducted with 16 tourist providers. The results are presented under the following headings:

- 5.1 Tourism provider profile;
- 5.2 Service provision and facilities;
- 5.3 Information and resources;
- 5.4 Promoting the Ring of Gullion area;
- 5.5 Looking ahead.

Due to the low base number, the findings are presented by count rather than by percentage.

5.1 Tourism provider profile

Seven of the 16 businesses surveyed were holiday cottages, two were hotels and two were pubs. The remainder of the businesses who took part in the study were a café/restaurant, activity centre, golf club, farm and activity centre.

Table 5.1.1: Main activity of business

Which of the following best describes the main activity of your business?	Total
<i>Base: All respondents</i>	
	16
Holiday cottage	7
Hotel	2
Pub	2
Café/restaurant	1
Activity centre	1
Golf club	1
Farm	1
Leisure activities	1
B&B	0

Seven tourism businesses were self employed or had no employees, four had up to 10 employees and five had more than 10 employees.

Table 5.1.2: Number of employees

Can you tell me, how many employees you have?	Total
<i>Base: All respondents</i>	
	16
50 plus	1
21-49	1
11-20	3
3-10	3
1-2	1
Self employed	4
None	3

Just under half (7) have been trading in the Ring of Gullion area for more than 10 years. Six businesses have been operational for between six years and 10 years, while two have been trading for between three and five years. Only one has been operational for one to two years.

Table 5.1.3: Length of time in business

How many years has your current business been operating?	Total
<i>Base: All respondents</i>	
	16
More than 10 years	7
6 to 10 years	6
3 to 5 years	2
1 to 2 years	1

Tourism providers were then asked whether they thought visitor numbers to the Ring of Gullion had increased or decreased in the past three years. One quarter of businesses (4) thought visitor numbers had increased while half (8) thought numbers had decreased. Two felt numbers had remained the same whilst two said that they did not know.

Table 5.1.4: Change in visitor numbers

Over the past 3 years would you say the number of visitors to the Ring of Gullion area has...?	Total
<i>Base: All respondents</i>	
	16
Increased	4
Remained the same	2
Decreased	8
Don't know	2

5.2 Service provision and facilities

Tourist providers were asked to rate the extent to which they were satisfied or dissatisfied with certain aspects of the Ring of Gullion area. Tourism providers were most likely to be very or quite satisfied with the playground (12), cleanliness (10) and walking routes/paths (10).

Businesses were most likely to be very or quite dissatisfied with cycling paths (10), festivals/special events (9), toilet facilities (9) and sign posts and directions (8).

Table 5.2.1: Satisfaction with facilities in the Ring of Gullion area

To what extent are you satisfied with the following in the Ring of Gullion area?	Walking routes / footpaths	Cycling paths	Festivals/special events	Canals, Lough, river	Playground	Cleanliness	Toilet facilities	Car park	Sign posts /directions	Information boards at locations	Ring of Gullion website
<i>Base: All respondents</i>	16	16	16	16	16	16	16	16	16	16	16
Very satisfied	7	2	4	7	12	9	4	7	7	6	5
Quite satisfied	3	1	3	-	-	1	2	1	1	3	1
Neither / nor	1	1	-	5	-	3	-	1	-	-	3
Quite dissatisfied	2	5	3	1	2	2	1	5	3	3	-
Very dissatisfied	3	5	6	3	1	1	8	2	5	3	1
Never used/Don't know	-	2	-	-	1	-	1	-	-	1	6

5.3 Information and resources

Providers were asked if they had used any channels to obtain information about events in the area. Eight tourism providers had used the Tourist Information Centres, seven utilised the Newry and Mourne Council website and five obtained information from articles in newspapers and magazines.

Table 5.3.1: Use of channels to obtain information

Have you used any of the following to obtain information about events in the Ring of Gullion area?	Total
<i>Base: All respondents</i>	<i>32</i>
Tourist Information Centres	8
Newry and Mourne Council website	7
Articles in newspapers/magazines	5
Internet/Ring of Gullion website	3
Newry and Mourne website	3
Discovernorthernireland.com	2
Advice from family and friends	2
Social media sites	1
Other	1

Opinions were split when it came to satisfaction with marketing campaigns and promotion involving the Ring of Gullion area. Eight tourism providers were either quite or very satisfied with marketing of the area, while the other eight providers were quite or very dissatisfied.

Table 5.3.2: Satisfaction with marketing campaigns and promotion

To what extent are you satisfied with the marketing campaigns and promotion involving the Ring of Gullion area?	Total
<i>Base: All respondents</i>	<i>16</i>
Very satisfied	5
Quite satisfied	3
Neither/nor	-
Quite dissatisfied	3
Very dissatisfied	5

Of the eight tourism providers who were dissatisfied with the marketing and promotion involving the Ring of Gullion, three believed there is not enough signage and two feel the Tourist Board needs to do more.

Table 5.3.3: Reasons for dissatisfaction with marketing and promotion

If unsatisfied, why do you say that?	Total
<i>Base: Those unsatisfied with marketing campaigns and promotion involving the Ring of Gullion</i>	
	8
Not enough signage	3
Tourist Board need to do more	2
Not enough advertising	1
More up to date information	1
Does not promote the individual private businesses	1

Five of the 16 tourism providers reported hosting events for visitors to the Ring of Gullion area while 11 do not.

Table 5.3.4: Incidence of hosting visitor events

Do you host events for visitors to the Ring of Gullion area?	Total
<i>Base: All respondents</i>	
	16
Yes	5
No	11

Of the five tourism providers who host events, four reported using the Ring of Gullion website to promote them. The one business that does not use the Ring of Gullion website said they have a dedicated event organiser to promote events for them.

Table 5.3.5: Usage of the Ring of Gullion website

Do you use the Ring of Gullion website to promote your events?	Total
<i>Base: All those who host events for visitors to the Ring of Gullion</i>	
	5
Yes	4
No	1

5.4 Promoting the Ring of Gullion area

Seven businesses expressed interest in becoming more involved in promoting the Ring of Gullion area.

Table 5.4.1: Interest in promoting the Ring of Gullion area

Would you like to be more involved in promoting the Ring of Gullion area?	Total
<i>Base: All respondents</i>	
	16
Yes	7
No	8
Don't know	1

When asked what would encourage tourism providers to get more involved in promoting the area, five said they would like more signs/leaflets, four would like more general information and three would like training for tourist providers.

Table 5.4.2: Incentives to encourage promotion of the area

What would help you get more involved in promoting the area?	Total
<i>Base: All respondents</i>	
	16
More signs/leaflets	5
More general information	4
Training for tourist providers	3
Training for tourist board staff	2
Grants/funding	2
More accommodation facilities	1

Thirteen tourism providers have leaflets and booklets available on their business premises, two do not and one was not sure. The two businesses that do not have leaflets available on their premises were asked why this was. Their reasons were as follows:

"I have run out."

"Would like to have leaflets but I just never received any."

Table 5.4.3: Incidence of having leaflet/booklet available on premises

Have you any of the Ring of Gullion leaflets/booklets available on your premises?	Total
<i>Base: All respondents</i>	
	16
Yes	13
No	2
Don't know	1

Positively 14 of the 16 businesses reported they would make an effort to display leaflets if they were sent directly to their premises, while two did not know whether they would.

Table 5.4.4: Propensity to display leaflets

If leaflets were sent directly to your premises would you make an effort to display them?	Total
<i>Base: All respondents</i>	
	16
Yes	14
No	-
Don't know	2

Businesses were asked if they would like help to become more environmentally friendly. Responses were mixed with eight businesses saying they would welcome assistance, six indicated they would not and two were not sure.

Table 5.4.5: Incidence of wanting assistance to become more environmentally friendly

Would you like help for your business to become more environmentally friendly?	Total
<i>Base: All respondents</i>	
	16
Yes	8
No	6
Don't know	2

5.5 Looking ahead

Five of the 16 providers plan to increase their business in the Ring of Gullion area over the next year, while ten do not and one was unsure. Of the five businesses who plan to expand their business over the next 12 months the ways in which they plan to do this include:

“Build a new function room.”

“More advertising.”

“Upgrade facilities, improve marketing facilities.”

Table 5.5.1: Plans to increase business in the area

Over the next 12 months do you have any plans to increase your business in the Ring of Gullion area?	Total
<i>Base: All respondents</i>	
	16
Yes	5
No	10
Don't know	1

Four of the 16 businesses felt the best way to increase tourism to the area would be to have more advertising and promotion of the area, while three felt providing more accommodation facilities in the area would help. Other methods included more signage/directions, better cycling paths and more activities in the area.

Table 5.5.2: Suggestions to increase tourism to the area

What more could be done to increase tourism to the area?	Total
<i>Base: All respondents</i>	
	16
Advertising/promotion of the area	4
More accommodation facilities	3
More signs/directions	2
Better cycling paths	2
More activities in the area	2
Better sporting activities	1
Training for staff in tourism	1
Better networking amongst local businesses	1
Don't know	2

6. Conclusions and recommendations

In this section we draw together the conclusions from the research findings and provide recommendations on future marketing campaigns, development of existing facilities and potential funding opportunities.

Service provision and facilities

On the whole the survey findings reveal that both tourism providers and visitors to the Ring of Gullion are satisfied with most aspects of service provision in the area. Particular areas of satisfaction include the playground and the walking terrain; evidence suggests that these may be the main pull factors generating visitor footfall. In particular, walking appears to be a keen motivator attracting people to the Ring of Gullion from outside the island of Ireland.

At present over three quarters of visitors are satisfied with the availability (77%) and quality (76%) of pubs/cafes/restaurants/coffee shops. Both visitors and tourism providers also expressed satisfaction with the cleanliness and car parking facilities in the Ring of Gullion area. One area for improvement raised by visitors and tourism providers alike is the availability of signs and information boards at various attractions throughout the Ring of Gullion area. Tourism providers also expressed a degree of dissatisfaction with the cycling paths, festivals/special events and toilet facilities.

It is important to note that a significant proportion of visitors indicated that they have no experience of many of the visitor attractions, including the Ti Chulainn centre, cycling paths and canals/loughs/rivers, and therefore did not have the opportunity to express their opinion of such service facilities. However, it was not apparent whether visitors were unaware of such attractions or did not have the inclination to make use of them.

Recommendations

- Continue to ensure that playground maintenance is kept to a high standard in order to encourage continued visitation to this area and potentially attract more young families.
- Consider further promotion of the walking routes in the area with the aim of attracting a higher incidence of visitors from outside Ireland.
- Review the current signage available at tourist attractions and assess whether further signposts/information boards are required. Ensuring greater signage and the level of information provided may improve overall satisfaction and improve the ease with which new visitors are able to find locations within the vicinity.
- Further explore the concerns of tourism providers in relation to cycle paths, festivals/events and toilet facilities and how these can be addressed.

Information and resources

Throughout the research it was evident that both visitors and tourism providers would welcome the provision of further information about the Ring of Gullion. Survey findings corroborate this, with 61% of visitors and half (50%) of tourism providers indicating that the Ring of Gullion would benefit from further promotion.

Findings indicate a lack of awareness of the Ring of Gullion website, particularly amongst visitors. It is also interesting to note that none of the visitors who have used the Ring of Gullion website have downloaded the audio tours, with over a quarter (27%) of such respondents claiming not to have noticed the tours.

Feedback from tourism providers reveals that they would benefit from wider marketing of the Ring of Gullion area, as half (50%) of respondents expressed dissatisfaction with the current level of promotion for the area. Feedback suggests that there are two ways in which promotion may be tackled. While some commented that the Tourism Board could do more to promote the area, around half (50%) of businesses indicated that they would also be willing to become more involved in the active promotion of the Ring of Gullion, and would like leaflets to be available on their premises. The majority of tourist providers reported that they would display leaflets/booklets if they were sent directly to them.

Recommendations

- Consideration should be given to promoting the website more widely to increase levels of awareness of the Ring of Gullion. There would also be merit in reviewing awareness of the audio tours and considering ways to promote these further.
- Findings reveal that those who use the website are overall satisfied with the content. Efforts should be taken to maintain the current standard of the website, and potentially improve it further.
- Review current modes of marketing the Ring of Gullion area and consider expanding to include information channels requested by visitors to the area. These included newspapers, radio/TV and promotional leaflets/materials.
- Continue to provide and replenish leaflets and booklets to businesses within the area to support tourism providers to actively promote the area.

Looking ahead

On the whole, visitors were highly positive about the likelihood of returning to the Ring of Gullion area. Despite this feedback, some respondents provided recommendations to encourage them to return to the area. 26% of people stated that holding more festivals and events in the area would encourage them to return or stay longer. Therefore more regular events and festivals could help boost numbers to the area as well as encouraging visitors to stay longer.

Consistent with previous feedback, business respondents stated that further tourism may be generated through wider advertising and promotion of the area. Others felt the availability of more accommodation facilities in the area would encourage visitors to stay longer.

Encouragingly almost all of visitors (93%) stated that they would return to the area, with such a high percentage saying this, it is essential that current standards of services and facilities are maintained.

Recommendations

- Consider facilitating further festivals/events in the area to ensure return/longer visits.
- With the vast majority of visitors indicating that they would return to the area, it is essential that current standards of services and facilities are maintained.
- Consider marketing and promotional channels to encourage greater visitation to the Ring of Gullion in the future.

Appendix A

Table A.1: Is this your first time visiting the Ring of Gullion?

Is this your first time visiting the Ring of Gullion?	Total	Male	Female	16 to 35	36 to 55	55+	NI	ROI	Outside NI/ROI
Base	307	131	176	98	134	75	165	92	60
Yes	60%	51%	66%	57%	57%	67%	56%	58%	76%
No	40%	49%	34%	43%	43%	33%	44%	42%	24%

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