



PUBLIC OPINION OF FORESTRY 2005: NORTHERN IRELAND

Summary results of the 2005 Survey of Public Opinion of Forestry, carried out on behalf of the Forestry Commission (GB) and Forest Service (NI)

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Executive Summary

2005 survey

The Forestry Commission has conducted similar biennial surveys of public attitudes to forestry and forestry-related issues since 1995. In the initial surveys a representative sample of 2,000 adults across Great Britain was surveyed. Over the years the scope of the survey increased to meet national requirements and in 2005 four separate surveys were done:

- A representative sample of around 4,000 adults across GB
- A representative sample of around 1,000 adults across Scotland
- A representative sample of around 1,000 adults across Wales
- A representative sample of around 1,000 adults across Northern Ireland

This report gives results of the survey in Northern Ireland. It also highlights any differences in opinion amongst adults in Northern Ireland by geographic region and socio-demographic variables (e.g. gender and age).

Forests, woodlands and trees in the media

38% of respondents have seen or read about Northern Ireland's forests, woodlands or trees in the last 12 months on the television, radio or in the newspapers. The topics most widely seen were 'tree planting' (22%), 'birds and other animals in woodlands' (13%) and 'forests and woodlands as places to visit' (12%).

37% of respondents were aware of National Tree Week.

Forest management

87% of respondents selected at least one public benefit as a good reason to support forestry with public money. The top reasons to support forestry were 'to provide places to walk in' (57%), 'to provide places for wildlife to live' (55%), 'to improve the countryside landscape' (47%) and 'to help prevent the greenhouse effect and global warming' (43%).

'Providing opportunities for walking' and 'providing homes for birds and other animals' were the functions of forestry rated most highly for performance.

66% of respondents felt that responsibility for access to public forests should remain with the Forest Service.

Changes to woodland

15% of respondents thought that the total amount of woodland in Northern Ireland had increased in the last 20 years. 54% thought it had decreased and 8% that it had stayed the same.

Similarly, 9% of respondents thought that the total amount of native woodland in Northern Ireland had increased in the last 20 years. 49% thought it had decreased and 7% that it had stayed the same.

75% of respondents would like to see more woodland in their part of the country, and only 1% would like less.

Of those respondents who would like to see more woodland in their part of the country, 39% would like to see a little more, 30% would like to see half as much again and a further 30% would like to see more than half as much again.

Wood products

12% of respondents thought that Northern Ireland produces much more wood than it uses, 10% thought that it produced the same amount as it uses and 39% thought that it produces much less wood than it uses. Nearly two-fifths of respondents said that they did not know if Northern Ireland produces more or less wood than it uses.

Woodland recreation

67% of respondents have visited forests or woodlands in the last few years. 83% of these have visited woodlands in the countryside and 47% have visited woodlands in and around towns.

Of those respondents who have not visited forests or woodlands recently, the main reason stated for not visiting was that the respondents were 'not interested in going' (38%).

62% of respondents rated their visit to forests as generally more enjoyable compared to visits to other similar outdoor recreation destinations and only 4% rated their visit as generally less enjoyable.

Encounters with motor bikers (10%) and cyclists (6%) were the most likely to decrease the enjoyment of visits to woodlands. However, 80% of respondents did not encounter any problems with other forests visitors.

'Asking friends or relatives' (39%), a 'Tourist Information Centre' (36%), a 'guidebook or map' (16%) or 'Forest Service premises or website' were the sources of information most likely to be used by adults to find out about a woodland not previously visited.

1. Introduction

Background

The Forestry Commission has conducted similar biennial surveys of public attitudes to forestry and forestry-related issues since 1995. In the initial surveys, a representative sample of 2,000 adults across Great Britain (GB) was surveyed.

Since 2001, the GB survey has been supplemented by surveys in Scotland and Wales, each interviewing 1,000 adults, to provide additional information tailored to each country's needs after devolution, taking account of the priorities in each country's forestry strategy.

In 2003, the main survey was extended to include Northern Ireland, and the sample size increased to 4,120 adults. This provided information of public attitudes across the UK, enabled regional reporting in England and improved the precision of the survey's results for Scotland and Wales.

However, for 2005, the main survey reverted to GB, now with a sample size of around 4,000 adults and a new supplementary survey of 1,000 adults in Northern Ireland was introduced.

Therefore, with the increased interest in country-level and regional information and the requirement for continued high-quality coherent information for the UK, the scope of the survey was increased to four separate surveys:

- A representative survey of around 4,000 adults across GB
- A representative survey of around 1,000 adults across Scotland
- A representative survey of around 1,000 adults across Wales
- A representative survey of around 1,000 adults across Northern Ireland

Core sets of questions were asked in all 4 surveys, other questions were survey-specific.

The Forest Service, an agency of the Department of Agriculture and Rural Development collaborated with the Forestry Commission to provide a version of the questionnaire that was suitable for Northern Ireland.

This report

This report gives results of the 2005 survey in Northern Ireland and highlights any differences in opinion amongst adults in Northern Ireland by geographic region and socio-demographic variables (e.g. gender and age). Where possible, it also compares results with those from the 2005 GB survey.

In order to show a breakdown by geographic region, Northern Ireland has been divided into four regions: 'Belfast City', 'North', 'South' and 'West'. We also refer to MRS social grades in socio-demographic comparisons. The population is divided into two groups; ABC1, where the chief income earner in the household is a non-manual worker and C2DE, where the chief income earner in the household is a

manual worker or is unemployed. Further details of these and other breakdowns are given in Appendices 2 and 3.

Separate reports are available for GB (which compares the 2005 results with previous surveys) and more detailed reports for England, Scotland and Wales.

Survey design

The information presented in this report is taken from the Ulster Omnibus survey carried out from 21st - 31st March 2005 by Millward Brown Ulster. The survey was based on a representative sample of around 1,000 adults (aged 16 or over) across Northern Ireland. They were selected from 45 sampling points by a stratified random selection method. More details of the sample method are given in Appendix 1.

The GB information presented in this report is taken from the RSGB General Omnibus survey carried out from 23^{rd} February – 1st March 2005 by Taylor Nelson Sofres on behalf of the Forestry Commission. The survey was based on a representative sample of 4,000 adults (aged 16 or over) across GB. They were selected from a minimum of 270 sampling points by a random location method. More details of the sample method are given in Appendix 4.

All results are subject to the effects of chance in sampling, so a range of uncertainty (confidence interval) should be associated with any result from the survey. The confidence intervals take into account the effect of clustering, weighting and stratification in the survey design (see Appendices 3 and 4).

- For questions asked to the whole Northern Ireland sample of around 1,000, the range of uncertainty around any figure should be no more than +/-4.6%.
- For responses of subgroups the range of uncertainty is higher (e.g. for males (461) and females (543) the range of uncertainty is no more than +/- 6.8% and +/- 6.3%, respectively).
- For questions asked of the whole GB sample of 4,000, the range of uncertainty around any figure should be no more than +/-2.3%.
- Differences of more than 5.2% between the Northern Ireland and GB surveys are statistically significant.

Results are shown as percentages. These have been individually rounded so may not always total to exactly 100.

We have also used multivariate regression models to look at the relationship between responses and socio-demographic information (e.g. gender and age) or geographic region. The models identify variables that are statistically significant (i.e. they result in more than chance variation). Some of the variables found to be significant in the regressions may not have seemed significant when simply comparing percentages, because some other correlated variable may have been acting in the opposite direction. Further details of the variables used in the regression modelling and the correlation between them are given in Appendices 2 and 3.

2. Forests, woodlands and trees in the media

2.1 Forests, woodlands and trees in the media

Respondents were asked whether they had seen or read about Northern Ireland's forests, woods or trees on the television, radio or in the newspapers in the last twelve months. Nearly two-fifths of respondents (38%) recalled having seen or read about at least one topic (Table 1).

Generally, recognition of topics was lower in the Northern Ireland survey compared with the GB survey, where respondents were asked whether they had seen or heard about *British* forests in the last twelve months.

The topics most heard about were 'tree planting' (22%), 'birds and other animals in woodlands' (13%) and 'forests and woodlands as places to visit' (12%).

Table 1: Whether respondent has seen or read about Northern Ireland's forests, woods or trees in the last 12 months (%)

	Northern Ireland	GB
Tree planting	22	21
Birds and other animals in woodlands	13	24
Forests and woodlands as places to visit	12	18
Public rights of access to woodlands	7	22
Flowers and other plants in woodland	7	15
Protests about roads or other developments on woodland	6	18
Loss of ancient or native woodland	6	15
Restoration of ancient or native woodland	5	15
Creation of new native woodlands	5	11
Selling public woodlands	3	9
Wood for fuel / (short rotation coppice)	3	7
Tree pests and diseases	2	10
Community woodlands / new local woodlands	2	10
Timber transport	1	5
Labelling / certification of wood products	1	6
Recalling at least one topic Base: All respondents - NI (1,004), GB (4,000)	38	50

Base: All respondents - NI (1,004), GB (4,000)

Regional comparisons

Respondents from the West (44%) and the South (41%) were more likely than those from the North (33%) and Belfast City (28%) to have recalled at least one of the listed.

Table 2 lists the 'top 5' most recognised topics and details the breakdown by region. Respondents from the South and the West were more likely to have seen or read about 'tree planting'.

Respondents living in Belfast City and the West were more likely to have seen or read about 'forests and woodlands as places to visit'. Those from the West were more likely to have seen or read about 'birds and other animals in woodlands'.

There were no regional variations in the proportions of respondents having seen or read about 'public rights of access to woodlands'.

Table 2: Whether respondent has seen or read about Northern Ireland's forests, woods or trees in the last 12 months, by region (%)

	Belfast City	North	South	West	Northern Ireland
Tree planting	12	17	26	29	22
Birds and other animals in woodlands	11	11	11	20	13
Forest and woodlands as places to visit	15	6	11	15	12
Public rights of access to woodland	7	5	9	5	7
Flowers and other plants in woodlands	6	6	6	8	7
Recalling at least one topic	28	33	41	44	38

Base: All respondents (1,004)

Socio-demographic comparisons

Respondents in Northern Ireland who are older (33% of those aged 16-34 years, 38% of those aged 35-54 years and 43% of those aged over 55 years) and those who have visited forests or woodlands recently (44% of those who have visited recently, 24% of those who have not) are more likely to have recalled at least one of the topics listed.

Considering each of the 'top 5' most recognised topics, respondents who are older and those who have visited forests or woodlands recently were more likely to have recalled each of the topics. Also, males (9%) were more likely than females (5%) to recall having seen or read about 'public rights of access to woodlands'.

2.2 Promotions of forests, woodlands, trees and wood products

A number of promotions are aimed at enhancing public understanding and awareness of woodlands, wood products and related issues. A further media-related question asked respondents about their awareness of two such promotions. Figure 1 shows that almost two-fifths of respondents (37%) had heard of 'National Tree Week', while only 4% had heard of 'Wood for Good'.

A different list of options was used in the GB survey, so no comparison is given here.

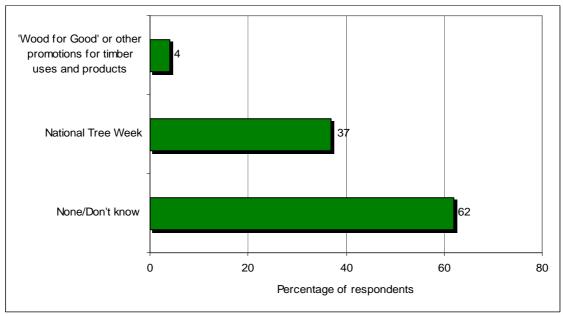


Figure 1: Whether respondent has heard of various promotions

Base: All respondents (1,004)

Regional comparisons

There were few regional variations in the number of respondents who had heard of the promotions. However, respondents from the North were more likely to have heard of 'Wood for Good' or other promotions for timber uses and products (6% of those from the North compared with 3% in all other regions).

Socio-demographic comparisons

Respondents who are older, in social grades ABC1 and who have visited forests or woodlands recently were all more likely to recall having heard of National Tree Week (Figure 2).

Only those respondents who have visited forests or woodlands recently were more likely to recall having heard of 'Wood for Good or other promotions for timber uses and products' (5% of those who have visited woodlands, 1% of those who have not).

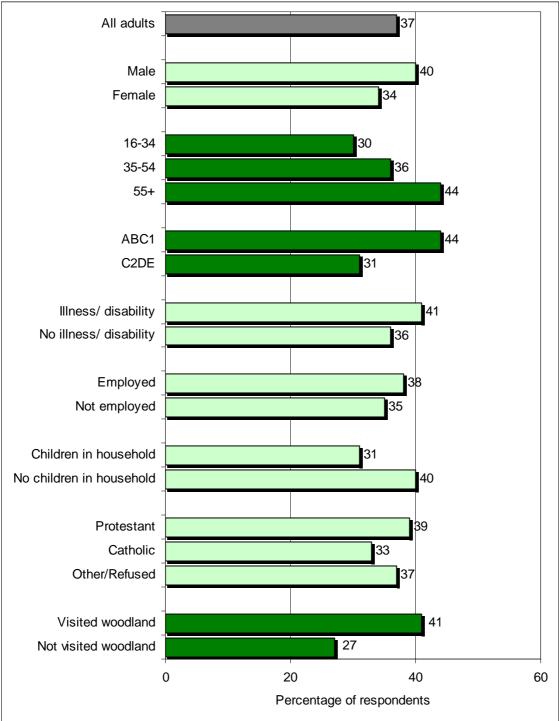


Figure 2: Whether respondent has heard of National Tree Week, by socio-demographic variables

Base: All adults (1,004)

NOTE: Dark green indicates statistically significant variable in multivariate model, light green others

3. Forest management

3.1 Benefits of forestry

The government funds forestry in Northern Ireland in many ways. Respondents were asked to select (from a list of possible public benefits) good reasons to support Northern Irish forestry with public money. Most of the respondents (87%) selected at least one benefit.

The top four good reasons to support forestry were 'to provide places to walk in', 'to provide places for wildlife to live', 'to improve the countryside landscape' and 'to help prevent the greenhouse effect and global warming' (Table 3).

Support for benefits was generally lower for the NI survey compared with the GB survey.

Table 3: Whether respondent believes public benefits are good reasons to support forestry with public money (%)

	Northern Ireland	GB
To provide places to walk in	57	57
To provide places for wildlife to live	55	67
To improve the countryside landscape	47	53
To help prevent the 'greenhouse effect' and global warming	43	55
To help rural tourism	39	36
To provide healthy places for physical activity, relaxation and stress relief	39	44
To support the economy in rural areas	30	41
To create pleasant settings for developments around towns	26	37
To make woods more accessible to all in the community	24	36
To provide places to cycle or ride horses	23	35
To provide wood as a renewable fuel	22	28
To provide renewable energy	21	-
So the we can buy less wood products from abroad	18	30
To provide timber for sawmills and wood processing	17	23
To restore former industrial land	13	30
None / Don't know	13	11

Base: All respondents - NI (1,004), GB (4,000)

Regional comparisons

Table 4 gives a regional breakdown for the top 6 benefits supported by adults in Northern Ireland. Overall, support for spending of public money on forestry was lower in North and South (80% of those from the North and 83% of those from the South selected at least one reason to support forestry with public money).

Considering each of the top 6 benefits, respondents from Belfast City were more likely to support spending public money 'to help prevent the greenhouse effect and global warming', 'to provide places for wildlife to live', 'to provide places for physical activity, relaxation and stress relief' and 'to improve the countryside landscape'

Those from Belfast City and the West were more likely to support spending public money 'to provide places to walk in' and 'to help rural tourism'.

Table 4: Whether respondent believes public benefits are good reasons to support forestry with public money, by region (%)

	Belfast City	North	South	West	Northern Ireland
To provide places to walk in	78	48	48	54	57
To provide places for wildlife to live	68	51	51	49	55
To improve the countryside landscape	64	44	42	39	47
To help prevent the 'greenhouse effect' and global warming	55	40	39	40	43
To help rural tourism	52	33	32	39	39
To provide places for physical activity, relaxation and stress relief	53	39	37	32	39
At least one reason given	92	80	83	90	86

Base: All respondents (1,004)

Of the other listed benefits, respondents from Belfast City, the North and the South were less likely to consider the spending of public money 'so we can buy less wood products from abroad' and 'to provide timber for sawmills and wood processing'.

Respondents from Belfast City were more likely to consider 'to provide wood as a renewable fuel', 'to make woods more accessible to all in the community', 'to provide places to cycle or ride horses' and 'to provide renewable energy' good reasons to support forestry with public money.

Those from the South were less likely to consider 'to provide places to cycle or ride horses' and those from Belfast City and the South were more likely to consider 'to create pleasant settings for developments around towns'.

Socio-demographic comparisons

Respondents who are in employment (90% in employment, 83% not in employment), aged over 35 years old (84% aged 16-34 years old, 88% aged 35-54 years old and 87% aged over 55 years old) and who have visited forests or woodlands recently (89% of visitors, 80% of non-visitors) are all more likely to choose at least one reason to support forestry in Northern Ireland with public money.

Considering each of the benefits individually, respondents who had visited forests or woodlands recently were more likely to support 12 of the 15 benefits, including 'to provide places to walk in' (62% of visitors, 46% of non-visitors) and 'to create pleasant settings for developments around towns' (29% of visitors, 20% of non-visitors).

Fewer Catholic respondents were likely to consider spending public money on 9 of the 15 benefits (e.g. 50% of Protestant respondents, 31% of Catholic respondents and 48% of respondents that are of other denominations, or refused to state their denomination, supported the spending of public money 'to prevent the "greenhouse effect" and global warming'). Similarly, those respondents in social grades ABC1 were more likely to support 10 of the 15 benefits than those in social grades C2DE (e.g. 46% of those in ABC1 and 34% of those in C2DE supported 'to help rural tourism).

Respondents with children in their household were more likely to support the spending of public money 'to support the economy in rural areas', 'to help prevent the greenhouse effect and global warming', 'to provide places for physical activity, relaxation and stress relief' and 'to create pleasant settings for developments around towns'. For example, 46% of those with children and 36% of those without support 'to provide places for physical activity, relaxation and stress relief'.

Males were more likely than females to support 'to provide timber for sawmills and wood processing' (20% of males, 15% of females) and 'to help prevent the greenhouse effect and global warming' (46% of males, 41% of females).

Fewer younger respondents were likely to support spending of public money on forestry 'so we can buy less wood products from abroad', 'to make woods more accessible to all in the community' and ' to create pleasant settings for developments around towns'. For example, 15% of those aged 16-34 years old, 19% of those aged 35-54 years old and 21% of those aged over 55 years old were likely to consider the spending of public money on forestry so we can buy less wood products from abroad.

3.2 Ratings of Northern Ireland's forestry

Respondents were asked to rate the performance of Northern Ireland's forestry on a number of aspects. Ratings were given on a scale of 1 to 5, 1 being 'very good' and 5 being 'very poor'. The aspects rated most highly were 'providing opportunities for walking' and 'providing homes for birds and other animals' (Figure 3). These two highest-rated aspects of Northern Ireland's forestry were also considered the best reasons to support forestry with public money (see Table 2).

It should be noted that in some cases a large proportion of respondents said that they could not give a rating, as they didn't know enough about particular aspects of forestry. This was especially so when asking about 'providing Northern Ireland's timber, board and paper needs', 'supporting Northern Ireland's economy in rural areas', and 'involving local communities' (41%, 34% and 30% respectively responded 'don't know').

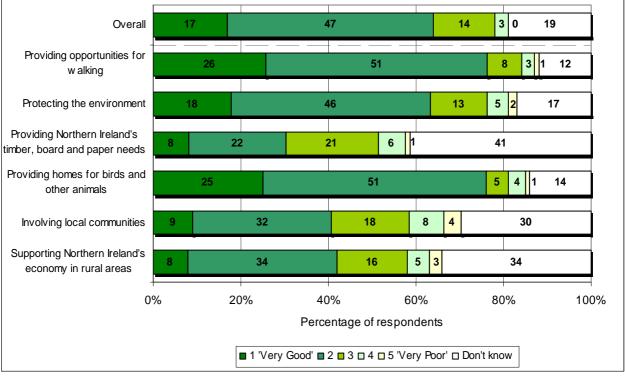


Figure 3: Performance rating of various functions of Northern Ireland's forestry

Base: All respondents (1,004)

Regional comparisons

The comparisons that follow consider only those respondents who gave an opinion; respondents who said they did not know are excluded from this analysis. For ease of comparison, only those rating a particular aspect of forestry as '1 (Very good)' or '2' are considered here. In Figure 4 and in all figures quoted, percentages relate to the proportions of respondents who have an opinion.

There were few regional variations in the proportion of respondents rating Northern Ireland's forestry at each activity. Respondents from the West were less likely to give a high rating to 'providing opportunities for walking' and 'providing Northern Ireland's timber, board and paper needs' than those from all other regions. For example, 81% of respondents from the West rated NI's forests as '1' or '2' at providing opportunities for walking, compared with 88% of those in the North, and 90% in both Belfast City and the South.

Figure 4 shows the overall performance rating of Northern Ireland's forestry by region. Respondents from the North were more likely to rate the overall performance of Northern Ireland's forestry as '1 (Very good)' or '2'.

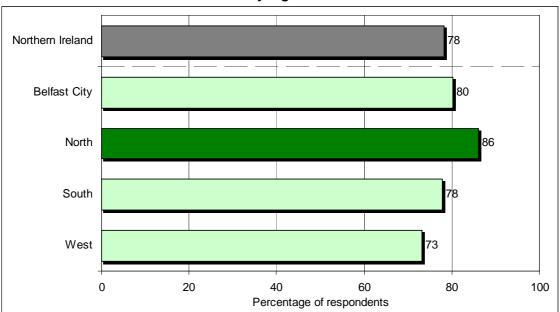


Figure 4: Overall performance rating of forestry as '1 (Very good)' or '2', by region

Base: Respondents who gave an opinion (817)

NOTE: Dark green indicates statistically significant variable in multivariate model, light green others

Socio-demographic comparisons

Respondents who were not in employment (75% of those in employment and 83% of those not) and those who have visited forests or woodlands recently (80% of visitors, 74% of non-visitors) were more likely to give a high overall rating of Northern Ireland's forestry.

Those in social grades ABC1 (44%) were less likely to rate 'providing Northern Ireland's timber board and paper needs' highly than those in social grades C2DE (57%).

Protestants were more likely than those from all other religious denominations to rate 'providing opportunities for walking' and 'providing homes for birds and other animals' highly. For example, 91% of Protestant respondents, 87% of Catholic respondents and 80% of all respondents of either any other denomination, or they refused to state their denomination, rated Northern Ireland's forestry highly at providing homes for birds and other animals.

3.3 Forest Management

In Northern Ireland, the responsibility of public forests, including public access to those forests, rests with the Forest Service, within the Department of Agriculture and Rural Development (DARD). Respondents were asked, in relation to access, which of the statements listed reflected how they thought forests should be managed.

Two-thirds of respondents (66%) felt that the responsibility for access to public forests should remain with the Forest Service (Figure 5). One-fifth of respondents had no opinion on forest management.

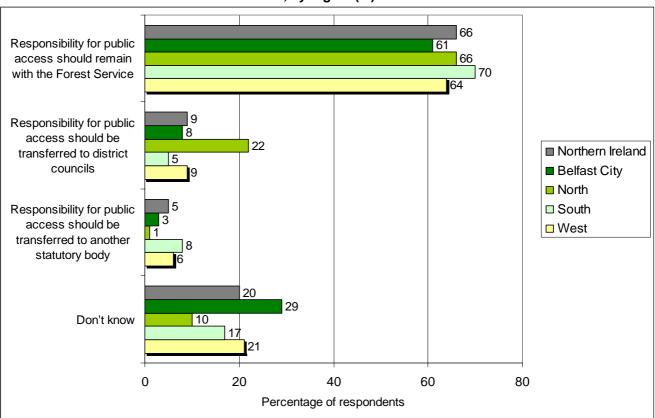


Figure 5: Respondents preference of management of public forests in relation to access, by region (%)

Base: All respondents (1,004)

Regional comparisons

Figure 5 shows that respondents from Belfast City were less likely to think that 'responsibility for public access should remain with the Forest Service' and those from the North were more likely to think that 'responsibility for public access should be transferred to district councils.

Respondents from Belfast City and the North were both less likely to think that 'responsibility for public access should be transferred to another statutory body'.

Socio-demographic comparisons

Figure 6 shows that respondents who are male, Protestant, older and have visited forests or woodlands recently were all more likely to think that 'responsibility for public access should remain with the Forest Service'.

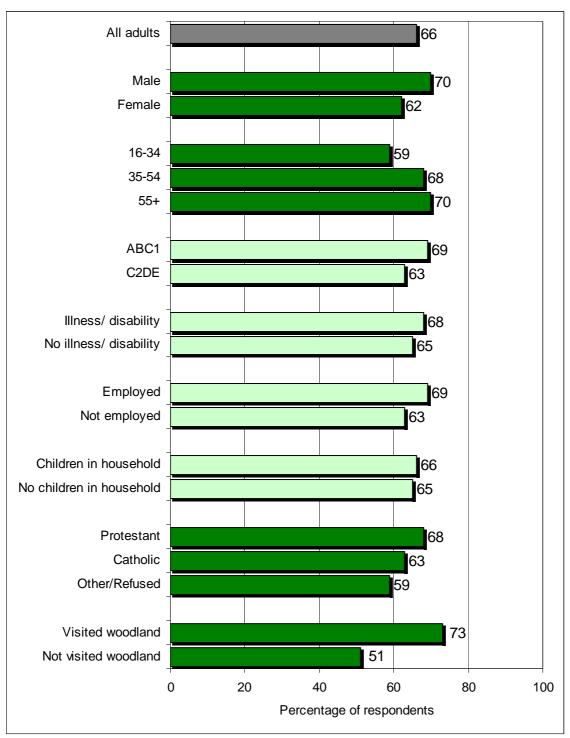


Figure 6: Proportion of respondents who believe responsibility for public access should remain with the Forest Service, by socio-demographic variables (%)

Base: All respondents (1,004)

NOTE: Dark green indicates statistically significant variable in multivariate model, light green others

4. Changes to woodland

4.1 Perception of change in woodland area

The recorded area of woodland in Northern Ireland has increased by nearly 30%, from 67,000 hectares in 1980, to 86,000 hectares in 2004. This was in line with the UK as a whole where the recorded total area of woodland also increased by 30% over the same period¹. Although some of the increase in GB can be attributed to improved coverage of woodlands inventories, the increase for NI is more firmly based on statistics for the Forest Service estate, which makes up 72% of the total woodland in NI. It is clear that total woodland area has increased in the last 20 years.

Respondents were asked whether they thought the total amount of woodland in Northern Ireland had been increasing or decreasing over the last twenty years. Only 15% said that the woodland area had increased, while the majority (54%) thought the area had decreased. Nearly a quarter of respondents (23%) said they did not know if the total area of woodland had changed in the last 20 years (Figure 7).

A higher proportion of the Northern Ireland respondents could not give an opinion on whether the total amount of woodland area had increased or decreased compared with the GB survey.

Respondents were also asked whether they thought the area of native woodland in Northern Ireland had been increasing or decreasing over the same period. A half of respondents believed the area of native woodland had decreased. Over one-third of respondents could not give an opinion.

¹ Forestry Statistics 2004, Forestry Commission, Edinburgh, 2004

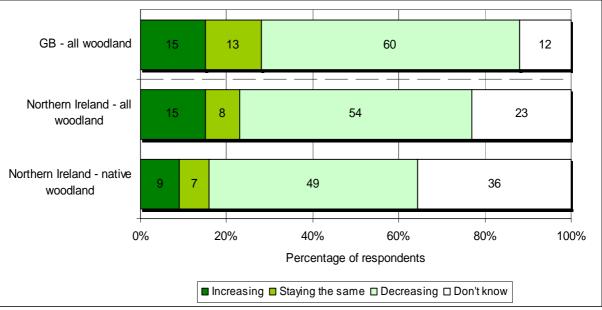


Figure 7: Perception of change in woodland area over last 20 years

Base: All respondents - NI (1,004), GB (4,000)

Regional comparisons

Of those respondents who gave an opinion, those from the South were less likely to think that the total amount of woodland area and native woodland area in Northern Ireland has been increasing (Figures 8 and 9).

Socio-demographic comparisons

Of those who gave an opinion, respondents who have visited forests or woodlands recently (21%) were more likely to perceive that the total amount of woodland area in Northern Ireland has increased over the last 20 years than those who have not visited recently (17%). Older respondents were also more likely to think that the total amount of woodland area has increased (18% of those aged 16-34 years old, 19% of those aged 35-54 years old and 22% of those aged over 55 years old)

Those from 'other' religious denominations or who did not give a religious denomination were more likely than Protestant or Catholic respondents to think that the total amount of native woodland area has increased (13% Protestant, 13% Catholic, 22% other/refused), as were those without children in their household (10% with children in their household, 16% without) and those who have visited forests or woodlands recently (15% of visitors, 11% of non-visitors).

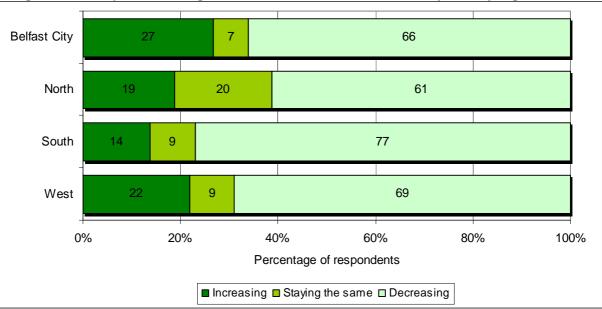
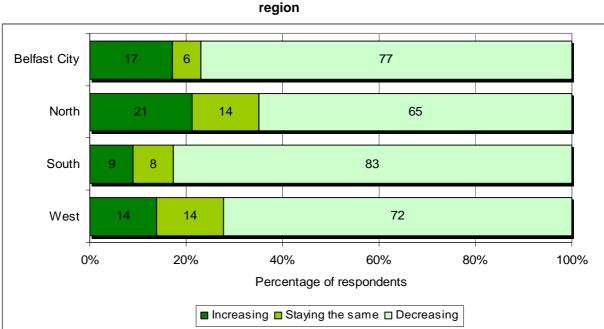
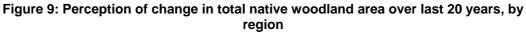


Figure 8: Perception of change in total woodland area over last 20 years, by region

Base: All respondents who gave an opinion (771)





Base: All respondents who gave an opinion (644)

4.2 Desire for change in woodland area

Respondents were then asked whether or not they would like more woodland in their part of the country. Three-quarters of respondents (75%) said they would like more woodland, whereas only 1% would like less.

Those respondents who wanted more woodland in their part of the country were then asked how much more they would like to see. Two-fifths of these (39%) said that they would like a little more, 30% would like half as much again, and a further 30% would like more than half as much again.

Respondents in Northern Ireland had a greater desire to have more woodland in their part of the country than did those in Great Britain, where two-thirds of respondents (66%) said they would like more woodland.

	Northern Ireland	GB
More than half as much again	22	18
About half as much again	23	24
A little more	30	23
More - total	75	66
Neither more nor less	15	29
Less	1	2
Don't know	9	4

 Table 5: Desire for more woodland (%)

Base: All respondents - NI (1,004), GB (4,000)

Regional comparisons

Of those who gave an opinion, respondents from the South, the North, and Belfast City were all more likely to want to see more woodland in their part of Northern Ireland.

Figure 10 shows that of those respondents who wanted more woodland and gave an opinion, those from the South wanted to see the greatest increase in woodland in their part of the country (41% of respondents want more than half as much again), and those from Belfast City wanted the smallest increase (49% of respondents wanted a little more woodland).

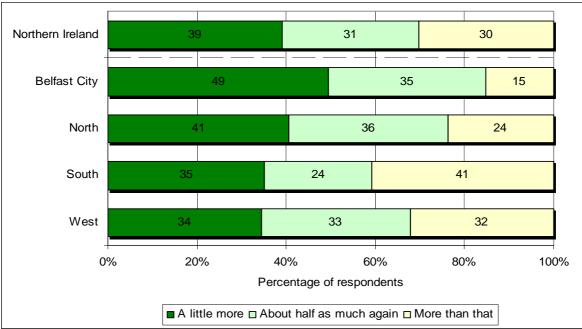


Figure 10: Desire for more woodland in respondent's part of the country, by socio-demographic variables

Base: All respondents who wanted more woodland and who gave an opinion (746)

Socio-demographic comparisons

Of those who gave an opinion, males (85% males, 79% females), those without a long term illness or disability (76% with a disability, 83% of those without) and those who have visited forests or woodlands recently (88% of visitors, 73% of non-visitors) were all more likely to want to see more woodland in their part of Northern Ireland.

Of those respondents who wanted more woodland in their part of the country and who gave an opinion, Protestant respondents were more likely to want to see a smaller increase in woodlands. 49% of Protestant respondents wanting 'a little more' woodland area compared with 29% of Catholics and 25% of all others.

5. Wood products

Northern Ireland produced around 600 thousand m^3 of timber (standing volume) in 2004 (mostly softwood, with a small amount of hardwood)¹. Assuming that the amount of wood used per head is the same in Northern Ireland as the rest of the UK, then Northern Ireland produces less than half the amount it consumes².

Respondents were asked whether they thought Northern Ireland produces more or less wood than it uses. Two-fifths of respondents (39%) thought that Northern Ireland produced much less wood that it uses, 12% of respondents thought Northern Ireland produced much more and 10% thought it produced about the same amount of wood as it uses. However the remaining two-fifths of respondents (39%) said they did not know whether Northern Ireland produces more or less wood than it uses. (Figure 11).

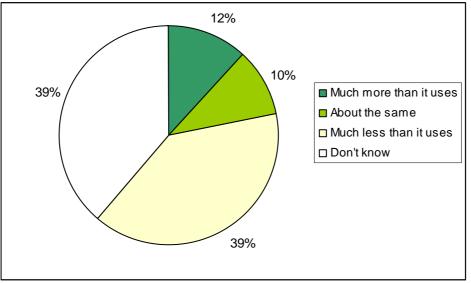


Figure 11: Perception of production versus usage of wood in Northern Ireland

Base: All respondents (1,004)

Regional comparisons

As Figure 12 shows, of those who gave an opinion, respondents from the West were more likely to think that Northern Ireland produces much more wood than it uses.

¹ UK figures available in UK Timber Statistics 2004, Forestry Commission, Edinburgh, 2005

² Forestry Statistics 2004, Forestry Commission, Edinburgh, 2004

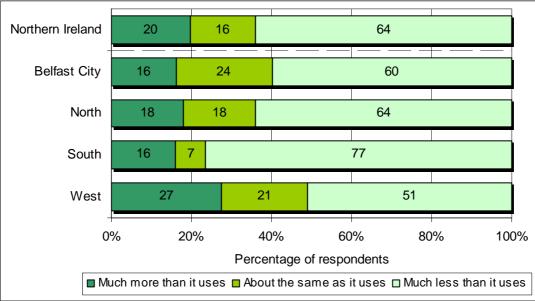


Figure 12: Perception of production versus usage of wood in Northern Ireland, by region

Base: All respondents who gave an opinion (615)

Socio-demographic comparisons

Of those who gave an opinion, respondents who were aged over 55 years old were less likely to think that Northern Ireland produces more wood than it uses - 24% of those aged 16-34 years old, 23% of those aged 35-54 years old and 10% of those aged over 55 years old thought that Northern Ireland produces much more wood than it uses.

6. Woodland recreation

The UK Forestry Standard¹ encourages the creation and improvement of public access to woodlands for recreation.

6.1 Visits to woodland

Two-thirds of respondents in Northern Ireland said that they had visited woodlands for walks, picnics or other recreation in the last few years (Table 6).

	Northern Ireland	GB
Visited woodland in last few years	67	65
Respondents who have visited woodland		
Woodlands in the countryside	51	46
Woodlands in and around towns	15	17
Both	32	35
Don't know	1	2

 Table 6: Visited woodland in last few years (%)

Base: All respondents - NI (1,004), GB (4,000)

Those who have visited woodland in the last few years - NI (668), GB (2,672)

A large proportion of woodland visitors said that they had visited woodlands in the countryside (83% in total) and nearly a half said that they had visited woodlands in and around towns (47% in total). Table 9 shows that just over a half of woodland visitors had only visited woodlands in the countryside, and 15% had only visited woodlands in and around towns. Nearly a third have visited both rural and urban woodlands.

Regional comparisons

Respondents from the South were more likely (75%), and those from the West (56%) were less likely than all other regions to have visited forests or woodlands in the last few years.

Of those who have visited forests or woodlands recently, those from Belfast City were more likley to have visited forests or woodlands in and around towns and less likely to have visited forests or woodlands in the countryside than all other regions (e.g. 70% of those from Belfast City visited woodlands in and around towns compared with 42% from the South and 39% from the North and 38% from the West).

Socio-demographic comparisons

Respondents who are in employment, aged under 55 years old and who have children in their household are all more likely to have visited forests or woodlands in the last few years. This is also true for those who are in social grades ABC1 and respondents who are not Catholic (Figure 13).

¹ FC (2004): *The UK Forestry Standard (2nd edition)*, Forestry Commission, Edinburgh

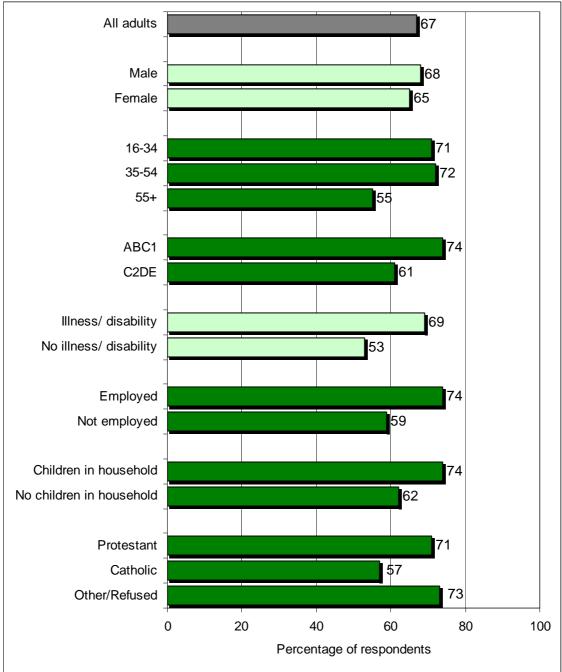


Figure 13: Whether respondent has visited forests or woodlands recently, by socio-demographic variables (%)

Of those who have visited forests or woodlands recently, respondents aged between 35 and 54 years old were less likely to have visited forests or woodlands in and around towns (e.g. 54% of those aged 16-34 years old, 44% of those aged 35-54 years old and 51% of those aged over 55 years old have visited forests or woodlands in and around towns).

Base: All respondents (1,004)

NOTE: Dark green indicates statistically significant variable in multivariate model, light green others

6.2 Reasons for not visiting woodland

Respondents who had not visited woodland in the last few years were asked about their main reason for not visiting (Figure 14). The main reason was that the respondent was 'not interested in going' (38% of those who had not visited). The other main reasons given were 'not having a car' (14%) and 'other personal mobility reasons' (11%). Reasons other than those stated accounted for 20% of the responses.

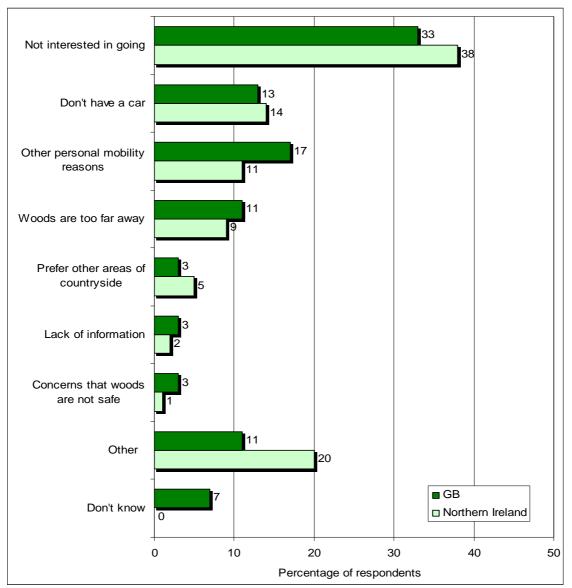


Figure 14: Main reason for not visiting forest/woodland in last few years

Base: All respondents who have not visited forests or woodlands recently (226)

Regional comparisons

Table 7 shows the most frequently stated reasons for not visiting forests or woodlands recently by Northern Irish respondents, and details the breakdown by region.

Respondents from the South were more likely to give their main reason for not going as 'not being interested' (48%). Those from Belfast City were less likely to give their main reason as being due to 'other personal mobility reasons' (5%) and were more likely to give their main reason due to any 'other' reason (29%).

Respondents from the West were more likely to state that the main reason they did not visit forests or woodlands in the last few years was due to the woods being 'too far away', and those from Belfast City and the North were more likely than those from all other regions to state that they 'prefer other areas of countryside'.

	Belfast City	North	South	West	Northern Ireland
Not interested in going	36	27	48	36	38
Don't have a car	20	9	8	16	14
Other personal mobility reasons	5	20	11	13	11
Woods are too far away	6	4	6	14	9
Prefer other areas of countryside	3	16	8	1	5
Other	29	16	14	13	17

 Table 7: Main reason for not visiting forests or woodlands recently, by region (%)

There were no significant regional variations in the proportion of respondents who gave their main reason for not visiting recently due to the fact they 'don't have a car'.

Socio-demographic comparisons

Fewer older respondents, females and respondents with a long term illness or disability were likely to state their main reason for not visiting forests or woodlands recently as they were 'not interested in going' (Figure 15).

Protestant respondents were more likely than those of any other religious denomination to state that their main reason for not visiting recently was due to the fact that they 'don't have a car' and those with a long term illness or disability were more likely to give their main reason as due to 'other personal mobility reasons' (42% of those with a long term illness or disability, 3% of those without).

Fewer younger respondents were likely to state their main reason for not visiting forests or woodlands recently as they 'prefer other areas of countryside' or any other reason which was not listed.

Those with children in their household were more likely to give another reason not listed as their main reason for not visiting (24% of those with children, 15% of those without), and those in employment were more likely to 'prefer other areas of countryside' (10% of those in employment, 2% of those not).

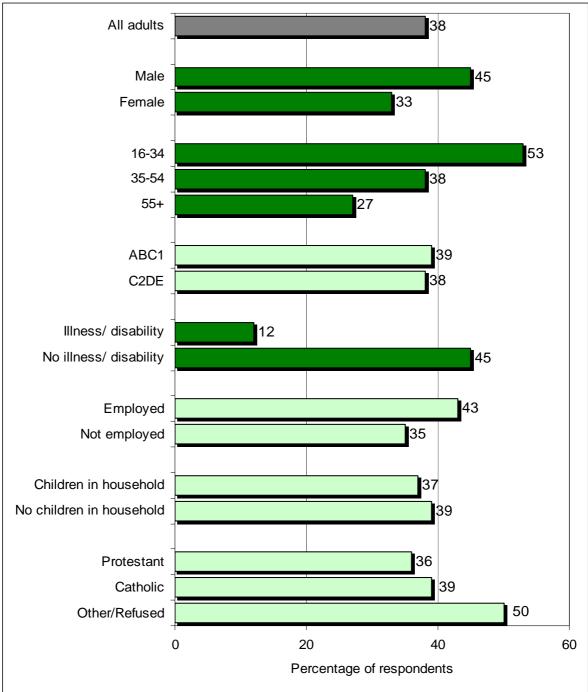


Figure 15: Respondents whose main reason for not visiting forests or woodlands recently is 'not interested in going', by socio-demographic variables

Base: All respondents who have not visited forests or woodlands recently (326) NOTE: Dark green indicates statistically significant variable in multivariate model, light green others

6.3 Visitor enjoyment

Those respondents who had visited forests or woodlands recently were then asked how they would rate their visits to forests compared with visits to other similar outdoor recreation destinations, such as country parks, gardens and nature reserves.

Over three-fifths of all respondents who have visited forests or woodlands recently stated that their forest visits were generally more enjoyable than visits to other similar outdoor recreation destinations. 28% felt that their visits were sometimes more enjoyable, sometimes less enjoyable, and only 4% felt that their visits were generally less enjoyable.

	Northern Ireland
Generally more enjoyable	62
Sometimes more enjoyable, sometimes less enjoyable	28
Generally less enjoyable	4
Don't visit other outdoor recreation destinations	1
Don't know	4

Table 8: Respondents rating of	forest visits (%)
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Base: All respondents who have visited forests or woodlands recently (668)

Respondents were also asked whether encounters with any other recreational users decreased the enjoyment of their visit. 80% of respondents had no adverse encounter with any other recreational user, however 10% felt that motor bikers decreased their enjoyment and 6% felt that cyclists decreased their enjoyment.

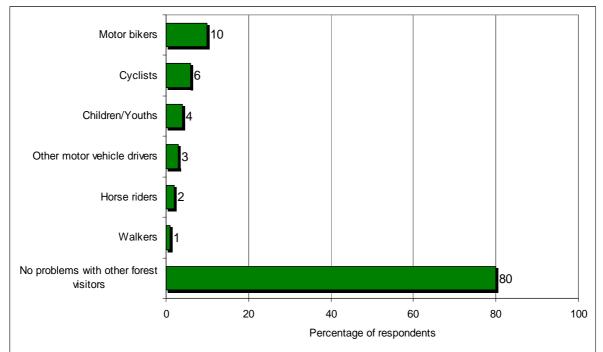
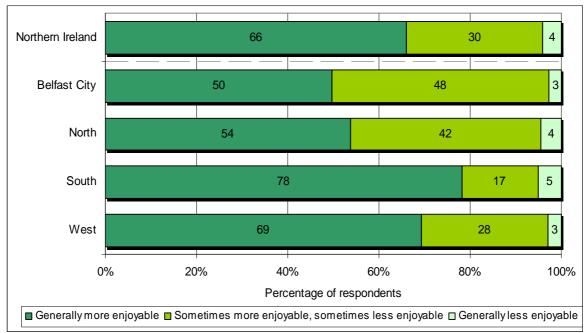


Figure 16: Decrease in enjoyment of woodland visit due to other recreational users

Base: All respondents who have visited forests or woodlands recently (668)

Regional comparisons

As Figure 17 shows, of those respondents who have visited forests or woodlands recently and who gave an opinion, respondents from the South and the West were more likely to rate their woodland visits as being 'generally more enjoyable' than visits to other similar outdoor recreation destinations.





Respondents from Belfast City were more likely to have encountered problems with cyclists during their woodland visit than those from all other regions.

Socio-demographic comparisons

Respondents who are older (58% of those aged 16-34 years old, 66% of those aged 35-54 years old and 73% of those aged over 55 years old) and are in social grades C2DE (59% ABC1, 71% C2DE) generally found their visits to forests much more enjoyable compared with visits to other similar recreation destinations.

There were no significant socio-demographic variations in the proportion of respondents encountering problems with any other recreational user during their forest visit.

Base: All adults who have visited forests or woodlands recently and who gave an opinion (629)

6.4 Information about woodlands to visit

'Asking friends/relatives' (39%), using a 'Tourist Information Centre' (36%) or 'a guide book or map' (16%) are the sources of information most likely to be used to find out about woodlands not previously visited (Table 8).

Note that 27% of respondents surveyed in GB were likely to use the Internet to find information for woodlands not previously visited and 7% would use the Forestry Commission. In the Northern Ireland survey, the question asked about the Forest Service website specifically, so no comparison is possible.

	Northern Ireland	GB
Ask friends/relatives	39	27
Tourist Information Centre	36	34
Guide book/map	16	28
Forest Service premises or website (NI only)	10	-
Internet (GB only)	-	27
Forestry Commission (GB only)	-	7
Library or Sports Centre	3	10
Other	4	1
No interest in visiting	4	16
Don't know	15	5

 Table 8: Sources of information normally used for woodlands not previously visited (%)

Regional comparisons

Respondents from the West were more likely to use a 'guide book or map' when looking for information about woodlands not visited before and respondents from the South were more likely than all other regions to use the 'Forest Service premises or website' (Figure 18).

Respondents from the North were more likely than those from all other regions to use a 'Tourist Information Centre' or a 'library or sports centre'.

Those from Belfast City were more likely to use another source of information not stated, and those from the South were less likely.

Base: All respondents - NI (1,004), GB (4,000)

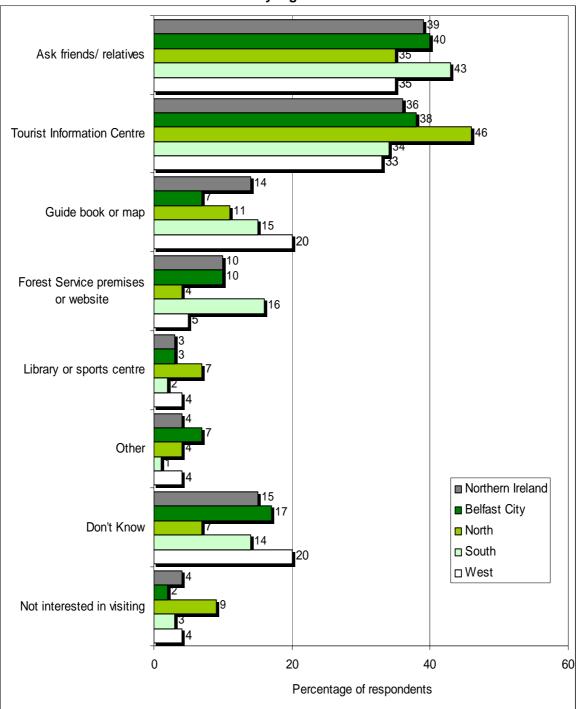


Figure 18: Sources of information normally used for woodlands not previously visited, by region

Base: All respondents (1,004)

Socio-demographic comparisons

Respondents who have visited forests or woodlands recently were more likely to 'ask friends or relatives', use a 'tourist information centre', a 'guide book or map' and the 'Forest Service premises or website'.

Those with a long term illness or disability were more likely to use a 'tourist information centre', the 'Forest Service premises or website' or 'library or sports centre'.

Respondents in social grades ABC1 (14% ABC1, 7% C2DE), those with children in their household (15%, 7%) and those in employment (14%, 6%) were also more likely to use the 'Forest Service premises or website' if they wanted to find information on a forest or woodland they had not visited before (Figure 19).

Females (34% males, 38% females), and those respondents in employment (41% of those in employment, 32% of those not) were both more likely to consult a 'Tourist Information Centre'.

Protestant respondents were less likely (11% Protestant, 16% Catholic, 21% other/refused) and respondents in employment were more likely (17% of those in employment, 11% of those not) to use a 'guide book or map'.

Those in social grades ABC1 were more likely than those in C2DE to use a source of information not listed.

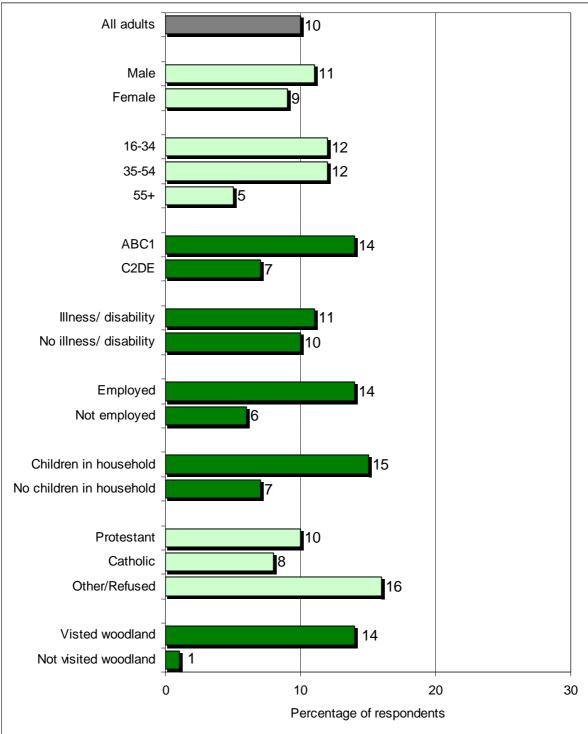


Figure 19: Respondents who would use the Forest Service as a source of information on woodlands not visited before, by socio-demographic variables

Base: All respondents (1,004)

Appendix 1: Cross-breaks used in analysis

Table 9 details the cross-breaks used in the analysis for Northern Ireland. It also shows the proportion of the sample that fall into each category (e.g. for gender, % of respondents were male and % were female).

	Table 9: Variables used in regression analysis					
Variable	Divisions	Distribution of sample	Distribution of 16+ Northern Ireland pop ⁿ in 2001 Census ¹	Details (where necessary)		
	Belfast City	24%	24%	Includes most of Castlereagh and parts of Newtownabbey		
Geographic	North	14%	14%	Antrim (excluding parts in Belfast)		
region	South	35%	35%	Armagh and Down (excluding parts in Belfast)		
	West	27%	27%	Fermanagh, Londonderry and Tyrone		
Gender	Male <i>(1)</i> Female <i>(2)</i>	46% 54%	48% 52%			
Age	16-34 <i>(1)</i> 35-54 <i>(2)</i> 55+ <i>(</i> 3 <i>)</i>	34% 36% 29%	35% 35% 30%	Adults 16 and over were divided into 3 age classes		
MRS social grades	ABC1 (1) C2DE (2)	43% 57%	43% 57%	ABC1: the chief income earner is a non-manual worker. C2DE the chief income earner is a manual worker or is unemployed ²		
Long term illness or disability	Yes (1) No (0)	15% 85%	25% 75%	From question in survey		
Work status	Employed <i>(1)</i> Not working <i>(2)</i>	49% 52%	51% 49%	Not working includes students, retired adults and unemployed		
Children in household	Yes (1) No (0)	36% 64%	39% 61%	Children under 16 in household		
Visited woodland	Yes (1) No (0)	67% 33%	n/a	From question in survey		
Denomination	Protestant (1) Catholic (2) Other/Refused (3)	58% 35% 7%	48% 39% 14%	From question in survey		

Table 9:	Variables	used in	regression	analysis
	V al labico		10910001011	analysis

Note: To aid in interpreting Table 13, the values used for each of the variables are detailed in italics.

¹ Northern Irish adult population (16 years +) 1,287,000

 $^{^{2}}$ MRS social grades are defined by the working status and income of the chief income earner in the household.

Appendix 2: Correlation matrix of variables used in analysis

Table 10 details the correlation between the socio-demographic variables used in the regression modelling. The greater the magnitude of the correlation coefficient, the more highly correlated the variables are.

More highly correlated variables include: gender with kids; age with long term illness or disability, children in household and work status; and work status with social grades.

	Gender	Age	MRS social grades	Long-term illness or disability	Children in household	Work Status	Denomination
Gender	1.00	-0.01	-0.02	-0.05	0.17	0.09	-0.04
Age		1.00	0.03	0.31	-0.34	0.31	-0.07
MRS social grade			1.00	0.08	0.04	0.20	0.01
Long term illness or disability				1.00	-0.14	0.27	-0.03
Children in household					1.00	-0.23	0.05
Work Status						1.00	0.02
Denomination							1.00

Table 10: Correlation coefficients of variables used in regression analysis

Furthermore, Table 11 shows that respondents from Belfast City tend to have a lower religious denomination value and those from the West a higher value (where 1=Protestant and 2=Catholic).

Table	11: Correlation of	oefficients o	f religious de	nomination	against regi	on

		Belfast City	North	South	West
	Denomination	-0.31	-0.06	0.09	0.25
- 4	- Evelvelas IOthan/Dat		-		

Note: Excludes 'Other/Refused' responses.

Since the regression modelling took into consideration each of the correlations between all of the regression variables listed in Table 10, when simply analysing percentages, consideration should be taken regarding the correlation between each of these variables and the effect they may have upon the significance of the results.

Appendix 3: Millward Brown Ulster sampling method

The Ulster Omnibus is a consumer omnibus survey that is conducted twice a month. It is a face-to-face survey amongst 1,000 adults aged 16+ years, using paper-based questionnaires.

Interviewing is carried out over 45 freshly selected sampling points. These sampling points are selected using a stratified random selection process that ensures representation in terms of regions of Northern Ireland.

Interviewers are set a quota to achieve for the interviews in each area, based on sex, age and social class. A range of standard questions are asked which include sex, age, social class, car in household, working status, presence of children, marital status, religion and ethnicity.

Appendix 4: RSGB Random location sampling method

A unique sampling system has been developed by Taylor Nelson Sofres for its own use. Utilising 1991 UK Census small area statistics and the post code address file, GB south of the Caledonian Canal has been divided into 600 areas of equal population. From these 600 areas a master sampling frame of 300 points has been selected to reflect the country's geographical and socio-economic profile. The areas within each Standard Region were stratified into population density bands, and within band in descending order by percentage of population in socio-economic groups I and II.

To maximise the statistical accuracy of Omnibus sampling, sequential waves of fieldwork are allocated systematically across the sampling frame so as to ensure maximum geographical dispersion. The 300 primary sampling units are allocated to 12 sub-samples of 25 points each; with each sub-sample in itself being a representative drawing from the frame. For each wave of Omnibus fieldwork, a set of sub-samples is selected so as to provide the number of sample points required (typically c. 139 for 2,000 interviews). Across sequential waves of fieldwork all sub-samples are systematically worked, thereby reducing the clustering effects on questionnaires asked for two or more consecutive weeks.

Each primary sampling unit is divided into two geographically distinct segments, each containing, as far as possible, equal populations. The segments comprise aggregations of complete postcode sectors. Within each half (known as the A and B halves) postcode sectors have been sorted by the percentage of the population in socio-economic groups II and I. One postcode sector from each primary sampling unit is selected for each Omnibus, alternating on successive selections between the A and B halves of the primary sampling unit again to reduce clustering effects. For each wave of interviewing each interviewer is supplied with two blocks of 70 addresses drawn from different parts of the sector. Addresses are contacted systematically with three doors being left after each successful interview.

To ensure a balanced sample of adults within effective contacted addresses a quota is set by sex (male, female housewife, female non-housewife); within female housewife, by presence of children and working status; and within men, by working status.

As with all multi-stage sample designs, there are effects on the magnitude of the standard error of estimates that arise from a number of sources. The greatest contributors are caused negatively by the effects of clustering and weighting and positively by the effects of stratification. These are collectively known as 'design effects'. The 'design factor' is used to estimated the ratio of the standard error of these complex sample estimates to that of a simple random sample of the same size. Design factors vary from one variable to another depending on the inter-correlations that exist between that variable and the causes of variation in the size of the standard error. For example social grade tends to be correlated between households in small geographical areas and thus variables that are correlated with social grade (e.g. visits to woodland) will have larger design factors. Such design factors need to be individually calculated from actual data to obtain accurate estimates for any given variable. Common practice is the use of a 'modal' value for application to estimates. For the Omnibus Taylor Nelson Sofres recommend a design factor of 1.5 be applied to the calculation of confidence limits and when testing for significance.

Appendix 5: Northern Ireland Questionnaire¹

Q1.	 You may have seen or read about Northern Ireland's (<i>British</i>) forests, wood the television, radio or in the newspapers. From this list, can you please to of these topics you have seen or read anything about in the last 12 months Birds and other animals in woodlands Flowers and other plants in woodlands Forests and woodlands as places to visit Community woodlands / new local woodlands Tree planting Tree pests and diseases Wood for fuel / (short rotation coppice) Loss of ancient or native woodlands Selling public woodlands Protests about roads or other developments on woodlands Labelling/certification of wood products Timber transport None of these 	ell me which
Q2.	 Which of these promotions have you heard of? 'Wood for Good' or other promotions for timber uses and products National Tree Week (Northern Ireland only) 	
Q3.	In Northern Ireland <i>(Britain)</i> public money is given to support forestry and and management of all types and sizes of forests and woods, because it is be of public benefit. From this list, please tell me which of the following re	believed to
	 good reasons to support forestry in this way? To support the economy in rural areas To help rural tourism To provide timber for sawmills and wood processing To provide wood as a renewable fuel So we can buy less wood products from abroad To make woods more accessible to all in the community To help prevent the "greenhouse effect" and global warming To provide places for wildlife to live To provide places to cycle or ride horses To provide healthy places for physical activity, relaxation and stress relief To restore former industrial land To provide renewable energy None 	(Multi choice)

¹ Questionnaire wording differed slightly between Northern Ireland and GB. These differences are detailed in individual questions in italics.

Q4.	 On a scale of 1 to 5, where 1 is very good and 5 is very poor, how good do you think Northern Ireland's (<i>British</i>) forestry is at Providing opportunities for walking Protecting the environment Providing Northern Ireland's (<i>Britain's</i>) timber, board and paper needs Providing homes for birds and other animals Involving local communities (<i>Northern Ireland only</i>) Supporting Northern Ireland's (<i>the</i>) economy in rural areas And using the same scale how would you rate the overall performance of Northern Ireland's forestry? Overall rating
Q5.	 Do you think Northern Ireland produces more or less wood than it uses? (Northern Ireland only) Much more wood than it uses Much less wood than it uses About the same amount of wood as it uses Don't know
Q6.	 In the last 20 years, do you think the total amount of woodland in Northern Ireland (<i>Britain</i>) has been increasing or decreasing? Increasing Decreasing Staying about the same Don't know
Q7.	 And over the same period, do you think the amount of native woodlands such as oak and ash in Northern Ireland has been increasing or decreasing? (Northern Ireland only) Increasing Decreasing Staying about the same Don't know
Q8.	 a. Would you like to have more or less woodland in your part of Northern Ireland (in this part of the country)? More Neither more nor less (Skip to Q9) Less (Skip to Q9) Don't know (Skip to Q9) b. How much more woodland: a little more, half as much again or more than that? A little more About half as much again More than that Don't know

Q9.	 In Northern Ireland the responsibility for the management of public forests, including public access to those forests, rests with Forest Service within the Department of Agriculture and Rural Development (DARD). Which of the following statements in relation to access reflects how you think forests should be managed? (Northern Ireland only) Responsibility for public access should remain with the Forest Service Responsibility for public access should be transferred to district councils Responsibility for public access should be transferred to another statutory body Don't know
Q10.	In the last few years, have you visited forests or woodlands for walks, picnics or other recreation? • Yes • No (then skip to Q10e) • Denik know (then skip to Q10)
	 Don't know (then skip to Q11) Did you visit woodlands in the countryside or woodlands in and around towns (or both)? Woodlands in the countryside Woodlands in and around towns Both How would you rate your visits to forests compared to visits to other similar outdoor recreation destinations, such as country parks, gardens and nature reserves? (Northern Ireland only) Forest visits are generally more enjoyable Forest visits are generally less enjoyable Forest visits are sometimes more enjoyable, sometimes less enjoyable Do not visit other outdoor recreation destinations Don't know During recent visits, did encounters with any of the following recreational users decrease the enjoyment of your visit? (Northern Ireland only) (then skip to Q11) Walkers Cyclists Horse riders Motor bikers Other motor vehicle drivers Children/Youths
	 No problems with other forest visitors What was the main reason that you did not visit? Not interested in going (skip to Q12) Don't have a car Lack of suitable public transport Other personal mobility reasons (difficulty in walking, unwell, etc.) Woods are too far away Lack of facilities (play areas, picnic areas, etc.) Lack of information about woods to visit Prefer other areas of countryside Concerns that woods are not safe Other (specify)

Q11.	If you were thinking about visiting forests or woodlands that you had not visited before, which of the following sources of information would you normally use?					
	Ask friends/relatives					
	Guide book or map					
	Forest Service premises or website					
	Tourist Information Centre					
	Library or Sports Centre					
	Other (specify)No interest in visiting					
	Don't know					
	The questions below have been included to enable the Forest Service to determine public opinion held by different groups about how it manages its forests. This will enable the Service to determine the effect its policies have on those groups.					
Q12.	How many dependent children (aged under 15) have you? (Northern Ireland only)					
	Do you suffer from any disability (long-term illness, health problems or disability which limits your daily activities or the work that you can do)?					
	Yes					
	• No					
	To which of these religious denominations, if any, do you belong? (Northern Ireland only)					
	Protestant					
	ProtestantCatholic					
	 Protestant Catholic Other Christian 					
	 Protestant Catholic Other Christian Jewish 					
	 Protestant Catholic Other Christian Jewish Muslim 					
	 Protestant Catholic Other Christian Jewish Muslim Hindu 					
	 Protestant Catholic Other Christian Jewish Muslim Hindu Other religion 					
	 Protestant Catholic Other Christian Jewish Muslim Hindu 					