



**Integrated Tourism Development & Marketing Strategy & Action  
Plan 2017-2022**

**Armagh City, Banbridge & Craigavon  
Borough Council**



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## 1. INTRODUCTION & BACKGROUND

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### 1.1 Introduction

Armagh City, Banbridge and Craigavon Borough Council formally took up its responsibilities on 1 April 2015. The Corporate Plan covers the period 2015 – 2017 and tourism features strongly within it. The Council's mission is *"to prosper the place, serve the people and strengthen our position"*. Growing the local economy is the Council's number one priority with specific work to:

- Support business development and business growth;
- Increase the tourism, hospitality and entertainment economy;
- Maximise external funding opportunities;
- Campaign to increase inward investment; and
- Bid for large scale signature events.

In addition, tourism is identified as one of the key sectors in the Borough's Regeneration and Development Strategy 2015-2020, with the potential to drive economic growth. Creating Places of Choice across the Borough for living, working, visiting and investing is one of the key strands of this Strategy with the aim being to support distinctive places by implementing policies and priorities appropriate to the challenges and importantly opportunities which they face.

Currently, the Borough comprises three of Northern Ireland's nine tourism destinations (Armagh, Lough Neagh and its Waterways and the Mourne), as defined in the draft Department for the Economy's Tourism Strategy to 2020. The area comprises a strong base of natural and built attractions and an extensive, year round programme of events.

The requirement of this commission was for the formulation of an inspirational, visionary, ambitious and action-orientated Tourism Development & Marketing Strategy and Action Plan for Armagh City, Banbridge and Craigavon Borough Council for the 2017-2022 period. The Strategy and Action Plan requires to be clearly market driven. The aim is to capitalise on Northern Ireland's growing performance as a tourism destination and as such innovation and creativity in partnership with the private sector in how we deliver tourism and the associated experiences is crucial so that we can achieve stand out nationally and internationally.

The Strategy and Action Plan will form the basis for prioritising Council resources, for bidding for national and international funding, where appropriate, and for informing the tourism planning policies and proposals and growth areas of the emerging Local Development Plan 2015-2030. Vivality, the Strategy and Action Plan is required to be founded on and have the buy in and commitment from private, public and voluntary sector stakeholders with a view to growing the economic base of the Borough.

### 1.2 The National Tourism Context

Following on from the Strategic Framework for Action and the development of the Signature projects, the draft Tourism Strategy for Northern Ireland ("TSNI") 2010 – 2020 set clear objectives to double tourism spending and to increase the number of visitors from 3.2 million to 4.5 million during the decade.

Presently, a new Tourism Strategy for Northern Ireland is under development. Although not completed, it is apparent that its orientation will be on 'out of state' visitors. The objective is to generate £1bn of spending in Northern Ireland by out of state visitors by 2025 (which translates into an average annual rate of increase of around 6.5% per annum). It is expected that 'local' tourism development strategies will complement this objective.

While recognising that Northern Ireland remains an emerging destination, it must address the dual challenges of not only catching its competitors, but also finding points of distinction if it is to succeed in a very competitive marketplace. To gain competitive advantage, Northern Ireland needs depth and consistency in its tourism offering. Depth in terms of a rich and diverse menu of compelling tourism experiences across the destinations that offer visitors more to see, to do, to spend their money on and reasons to return, and consistency in terms of the delivery of a seamless visitor experience.

The key objective for the Armagh City, Banbridge and Craigavon Borough is how we position ourselves to take advantage of the forecast growth in tourism to Northern Ireland to 2025. Currently the Borough is ranked 10 out of 11 local government districts in terms of spend, equating to £22.5mn in 2015. Current tourism performance does not reflect the quality of the rich built and natural heritage and cultural assets within the Borough.

### **1.3 Geographical Context**

Armagh City, Banbridge & Craigavon Borough Council, covering an area of 554 square miles and with a population in excess of 204,000, outside of Belfast is the largest council in Northern Ireland. It is strategically positioned on the axis of the main East West and North South economic corridors and is supported by high quality road and rail links to both Northern Ireland and the Republic of Ireland.

The area has a unique tapestry of contrasts: ancient – modern, urban – rural, industry – agriculture, waterways – road and railways, that set it apart from anywhere else in Northern Ireland and offers exciting opportunities for the future.

The Borough's key urban centres are Armagh City, Central Craigavon, Portadown, Lurgan and Banbridge. The rural population represents 48% of the Borough's overall population and within the Borough's boundaries are, to the west the historic Navan Centre and Fort, and to the north the scenic southern shores of Lough Neagh with the Mourne foothills. In the east, the Newry-Portadown canal leads to the southern boundaries. Most destinations are dominated by urban populations. However, given the relatively rural nature of the Borough, this destination can offer more of a balanced approach to the visitor.

The Council area contains an abundance of environmental assets. These sites are protected using various landscape designations to ensure that our natural environment retains its special characteristics, delicate ecosystems and unique biodiversity.

Our built environment has evolved over many hundreds of years to produce a rich and diverse cultural heritage. There are many elements of our historic environment – from the remains of remote ancient settlements and castles, ritual sites and tombs, and the many buildings of architectural importance in our cities, towns and villages.

Both the built and natural environments are key assets for the Borough including ancient sites and Conservation Areas together with environmental designations including Area of Special Scientific

Interest, Ramsar, Nature Reserves and Special Protection Area. The cultural tourism offer including arts and events has been growing in importance also.

In addition, Emain Macha, the Navan Fort is currently listed on the UNESCO Tentative List for World Heritage recognition as part of a group of six unique and iconic ensembles of largely prehistoric unique monuments and sites – ‘The Royal Sites of Ireland’.

To date significant investment has also been made in heritage-led regeneration initiatives in urban locations across the Borough. In addition, there has been a notable growth in the hospitality sector in recent years with substantial investment from the private sector in restaurants, cafes, bars and entertainment including a number of award-winning businesses.

#### **1.4 Consultancy Team**

ASM in conjunction with Stevens and Associates were appointed to undertake the development of the Borough’s Integrated Tourism Development & Marketing Strategy & Action Plan 2017-2022 in March 2016. An extensive programme of one-to-one consultations together with industry and Member workshops were undertaken to inform the strategy and action plan formulation. In addition, a comprehensive review of national, regional and local strategies, plans of relevance and assessment of tourism market trends were reviewed to ensure a comprehensive understanding of the context in which the Council’s Integrated Tourism Development & Marketing Strategy & Action Plan will be set.

## 2. WHERE ARE WE NOW?

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### 2.1 Island of Ireland

#### 2.1.1 Tourism Performance

- 9.5mn visitors were welcomed to the island of Ireland in 2015, up 12% from 2014. Forecasts indicate further growth for 2016.
- More than two-fifths of visitors in 2015 (45%) came for a holiday with approximately one-third coming to visit friends and/or relatives (VFR) while almost one-sixth came for business reasons.
- Total overseas revenue was €4.9bn in 2015 with the Great Britain market contributing 28% of revenue, the US 23%, Germany 8% and France 5%.
- 21% of island of Ireland visitors (and 14% of holidaymakers) stay in Northern Ireland at some stage during their visit equating to 13% of all spend.

#### 2.1.2 Island of Ireland Market Segment Overview

##### Great Britain

- The island of Ireland has lost half of its tourism business from GB over the past five years.
- The GB Path to Recovery highlights that British holidaymakers primarily view the island of Ireland as a short-break destination that competes mostly against British destinations. Key to recovery from this market is the need to make holidaymakers aware of what is on offer and so deliver the experiences they want.
- The best prospect segments are the Culturally Curious (over 45s who want to broaden their minds), Social Energisers (young, fun-loving urban adventurers) and Great Escapers (younger couples who want to get away from it all).
- The Culturally Curious and Great Escapers are best prospects for this Borough given the type of experience sought by these visitors.
- For the Culturally Curious the experiences sought include Living Historical Stories and Awakening the Senses with the focus being to explore new areas, active sightseeing, historical buildings and attractions, gardens, galleries, literary tours, World Heritage Sites, visitor centres, local festivals and events and artisan foods.
- For Great Escapers the experiences sought include Living Historical Stories and Getting Active in Nature with the focus being on breath-taking landscapes, ancient sites, remote places, landmarks, restaurants offer fresh local food, authentic pubs.
- In relation to the experience offering, the destination needs to deliver different kinds of experiences, excel at one or two things – the ‘hero’ experiences, make it easy for holidaymakers to access, interpret and engage the ‘hero’ experiences.
- The Culturally Curious remain heavy users of traditional media but digital plays an essential role
- 65% of Tourism Ireland’s marketing budget in GB will be allocated to the Culturally Curious and Great Escapers in 2017.

##### Mainland Europe

- 32% of all island of Ireland visitors are from Mainland Europe with Germany and France the two principal generating regions.

- 54% of Europeans visit Ireland on holiday, accounting for 38% of all holiday visitors to the island.
- One-third of all spend on the island of Ireland is generated by European visitors.
- Culturally Curious and Great Escapers are the two main segments from the German and French markets
- Satisfaction levels of French and German visitors are high but there is recognition that there is requirement to differentiate the island of Ireland from competitors amongst these markets.

### North America

- 68% of North American visitors to the island of Ireland are on holiday.
- They are high users of premium paid accommodation and services
- The Southern states, Mid Atlantic, West, and Mid West are key generators areas for visits to the island of Ireland. For 2017 there are 54,000 seats weekly through 17 gateways.
- Best prospects are the Culturally Curious and Social Energisers. The Culturally Curious are the best prospects for this destination given the type of experience sought by these visitors which also includes a wide variety of experiences given their relatively higher average length of stay
- In addition there is a growing interest from niche segment particularly in the US in our destination which would assist in driving business. These include faith based travellers, choral and performance groups and pilgrims.

## **2.2 Northern Ireland**

### **2.2.1 Tourism Performance**

- There were 2.3mn out-of-state trips to Northern Ireland in 2015 with a total spend of £545mn. Domestic spending accounted for an additional £219mn.
- Visitors from Great Britain accounted for 56% of all out-of-state trips and half of all spend. 15% of out-of-state trips were from the Republic of Ireland market (with 11% of spend) with European spend contributing 11% to the total and North American markets 13% of all out-of-state spend.
- There were 336,000 trips from the Republic of Ireland to Northern Ireland in 2015 equating to a spend of £61mn.
- Currently, however, Northern Ireland accounts for only 5% of all short breaks taken by Republic of Ireland residents and the volume of holidaymakers to Northern Ireland declined by 28% between 2012 and 2015.
- Whilst 45% of Republic of Ireland residents had taken a domestic holiday trip only 13% had taken a holiday trip in Northern Ireland.
- Motivations for taking a short break from Republic of Ireland with people seeking an escape from daily pressures and somewhere to spend time with family or as a couple.
- The best prospects from the Republic of Ireland market are Mature Cosmopolitans. These customers are slightly older, more likely to travel in groups and more likely to take in the sights of the places they visit. They stay in the best hotels and enjoy fine dining, relaxing in the hotel and at nearby scenic locations, exploring local attractions and socialising with the people with whom they have come on holiday. Although they expect quality they are interested in deals which they source through both traditional and digital media channels.
- Initial feedback from the Republic of Ireland Recovery Taskforce highlights that whilst interest in visiting Northern Ireland for a holiday is comparatively weak, more direct industry promotion in this market combined with highlighting Northern Ireland's relative strengths which include

shopping, scenery, culture and heritage can assist in driving market recovery. A particular challenge for this destination is improving the product and packaging of experiences as knowledge of Northern Ireland beyond Belfast and the Causeway Coast is relatively limited.

### 2.3 Armagh, Banbridge, Craigavon - Tourism Performance

In 2015, the volume of tourism trips and the value of spending for the Borough represented round 3% of the Northern Ireland total (£760m), while the number of overnight stays represented 5% of the Northern Ireland total. According to NISRA (the Northern Ireland Statistics Research Agency), ABCBC was one of 4 council districts in which tourism performance declined in 2015 when compared to 2014. However, the metrics recorded over the 4 year timeframe appear inconsistent from one year to the next and this makes it difficult to draw any firm conclusions.

**Figure 1 – Armagh City, Banbridge and Craigavon Borough Council Tourism Performance**

Tourism performance ABCBC	2012	2013	2014	2015	2015 v '14
Trips	128,572	201,334	231,797	149,449	-35%
Overnight stays	495,157	821,771	769,129	562,886	-26%
Spend	£14.9m	£22.0m	£28.3m	£22.5m	-20%
Avg. length of stay	3.9	4.1	3.3	3.8	+15%
Avg. spend per trip	£116	£109	£122	£150	+23%
Avg. spend per night	£30	£27	£37	£40	+8%

Source: NISRA

In terms of tourism spend, the Borough was ranked 10<sup>th</sup> of 11 local authority districts. It should be noted that the above figures relate to overnight visitors only, based on tourism trips made by Northern Ireland residents and visitors from outside Northern Ireland, i.e. excludes day trippers.

### 2.4 Profile of Overnight Visitors<sup>1</sup>

#### 2.4.1 Origin of Visitors

According to NISRA reports, the Borough's overnight tourism economy is dominated by the domestic Northern Ireland market with just over four in every ten visitors emanating from this source. However, a further one-third are from Great Britain which is greater than the Northern Ireland average of 29%. One in ten visitors from the Republic of Ireland market which is broadly comparable to the NI average.

#### 2.4.2 Reason for Visit – All Overnight Visitors

NISRA statistics indicate that the vast majority of overnight trips to the Borough (69%) were undertaken by those Visiting Friends & Family, which was the greatest proportion when compared with all other local authorities in Northern Ireland. In contrast only 18% were staying in the Borough as pure holiday visitors representing only 2% of all holiday visits to Northern Ireland. Meanwhile business visitors accounted for 5% of the Borough's overnight trips.

#### 2.4.3 Reason for Visit – Serviced Accommodation Users

In a further insight to the overnight market, ASM and Terry Stevens & Associates undertook a review of demand for overnight serviced accommodation as part of the Visitor Accommodation Development

<sup>1</sup> Source: NISRA – Based on three year rolling average 2013-2015.

Plan including the profile of visitors using this accommodation. The results of this are highlighted in Figure 2 below.

**Figure 2 – Estimated market demand for serviced accommodation**

Estimated market demand for Serviced Accommodation (2015)	Hotel		G/H B&B Guest Inn		Total	
	Nights	%	nights	%	nights	%
	Corporate/business	18,973	44.6%	2,202	28.4%	21,175
Ancestry/family events	3,010	7.1%	1,091	14.1%	4,101	7.3%
Leisure	11,567	27.2%	4,474	57.5%	16,040	28.5%
Conference / events	3,680	8.7%	-	-	3,680	6.5%
Groups	4,301	10.1%	-	-	4,301	7.7%
Other	985	2.3%	-	-	985	1.8%
<b>Council district total</b>	<b>42,515</b>	<b>100%</b>	<b>7,767</b>	<b>100%</b>	<b>50,282</b>	<b>89%</b>
Self-catering units occupied *					5,942	11%
<b>Total nights in commercial accomm</b>					<b>56,224</b>	<b>100%</b>

*\* Number of bedrooms occupied is unknown*

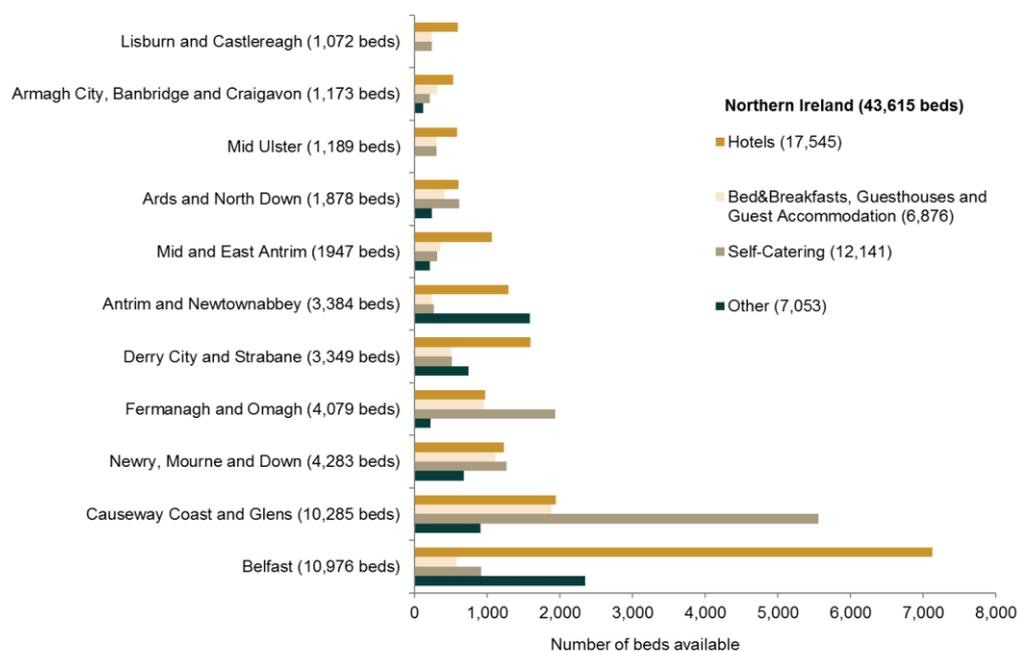
This contrasts somewhat with the findings from NISRA with this research indicating a particular reliance on non-discretionary corporate visitors (38%) with the leisure market also more prevalent (29%) but is explained by these segments having a higher propensity to use serviced accommodation compared with those Visiting Friends and Family.

As highlighted above, there is currently no measurement system in place in relation to the day trippers.

## 2.5 Tourism Product Overview

### 2.5.1 Accommodation Supply & Demand

**Figure 3 – Number of beds available in licensed accommodation by accommodation and Local Government District, 2015**



Source: NISRA

The supply of accommodation in the Borough is one of lowest of all local authorities in Northern Ireland with the supply of hotel rooms particularly low. Whilst there are some excellent examples of high quality 5 star Guesthouse and Self Catering accommodation, on the whole there is a very limited supply of upmarket accommodation.

**Figure 4 – Visitor Accommodation Stock in Armagh City, Banbridge & Craigavon Borough Council, May 2016**

Grading	Hotels		G/House & B&B & GA		Self-catering		Hostel	
	units	rooms	units	rooms	estab.	units	units	rooms
5 star	-	-	2	9	2	4	-	-
4 star	-	-	-	-	7	12	1	18
3 star	3	112	1	5	7	16	-	-
2 star	3	58	-	-	-	-	-	-
1 star	-	-	-	-	-	-	-	-
ungraded	1	36	37	128	11	12	1	13
<b>Total</b>	<b>7</b>	<b>206</b>	<b>40</b>	<b>142</b>	<b>27</b>	<b>44</b>	<b>2</b>	<b>31</b>

Source: Tourism NI grading as at 12 May 2016

A review of the performance of the Borough's visitor accommodation sector indicates only average levels of demand with hotel room occupancy levels of 55%, Guest House/Guest Accommodation/B&B room occupancies of 16% and self catering occupancy levels of 37%. However, from experience it is apparent that LGD averages can mask high levels of demand at

tourism “hotspots” within a destination. Key findings from consultations undertaken with local accommodation providers include:

- hotel bedroom demand in the Craigavon/Lurgan area, at around 70% for 2015, appears to be much higher than the LGD average;
- in the Armagh area the average bedroom occupancy rate during the year is estimated at somewhere between 50% and 55%; and
- using the information provided and disaggregating the results from the NISRA council district estimates suggests that hotels in other locations within the destination recorded an average bedroom occupancy rate of around 62%. Conversations with stakeholders indicates that the demand for accommodation around the commercial core of the district (Portadown/Craigavon) is such that there could be significant “seepage” of demand to hotels in Lisburn and Belfast, but this cannot be proven.

The conclusions drawn at this stage is that there is a low level of bedroom demand because there is a lack of choice, quantum and quality of accommodation which is not in keeping with market demands. It is also apparent that the destination appeal needs to be improved to provide compelling reasons for out-of-state visitors to stay in the Borough.

## 2.5.2 Visitor Attraction Performance

In 2015 the top three visitor attractions in Northern Ireland were the Giant’s Causeway (0.85 million visits), Titanic Belfast (0.62 million) and the Ulster Museum Belfast (0.47 million).

The first observation is that there are a wide array of attractions in the Borough focused on history and heritage, gardens and science and the stars. Not all are available for independent visits throughout the week or across the entire year. Whilst having a wide array of attractions is considered a strong positive for any destination, it should however be noted that the vast majority of these attractions are free to visit with the top 3 attractions in terms of visitor numbers, Oxford Island National Nature Reserve (220,928 visits), Kinnego Marina (209,027) and Lough Neagh Discovery Centre (133,437) being non-fee paying. Without the benefit of income from other sources or a strong retail and/or catering offer, this clearly therefore places pressure on the sustainability of the Borough’s attractions over the medium-long term.

**Figure 5 – Visitor attractions attendances at attractions/facilities in Armagh City, Banbridge and Craigavon Borough, 2011-2015<sup>2</sup>**

Name of Visitor Attraction	2011	2012	2013	2014	2015
Ardress House	6,900	6,500	7,000	6,889	7,200
Armagh County Museum	12,851	13,099	9,452	10,001	11,147
Armagh Observatory	42,006	42,491	11,000	40,151	44,805
Armagh Planetarium	35,700	41,011	47,706	49,957	48,727
Armagh Public Library	4,403	6,094	7,086	7,713	7,959

<sup>2</sup> Some respondents wished their visitor numbers to remain confidential and therefore visitor numbers for these attractions have been excluded from this table. The visitor numbers provided for Gosford Forest Park are for fee paying visitors only. During 2013 the counters for Armagh Observatory failed and therefore visitor numbers for 2013 reflect part of the year only.

Name of Visitor Attraction	2011	2012	2013	2014	2015
Armagh Roman Catholic Cathedral	9,000	9,000	-	-	60,000
Bronte Homeland Interpretive Centre	565	-	-	-	335
Brownlow House	-	-	-	-	15,000
Cardinal Tomas Ó Fiaich Memorial Library and Archive	-	-	10,972	-	5,280
Coney Island	-	-	2,006	2,000	2,000
Craigavon Museum	12,000	13,054	4,500	-	8,465
Dan Winter's House	3,530	3,197	3,925	4,160	3,437
Edenvilla Park and Garden	-	-	-	-	140,074
FE McWilliam Gallery & Studio	43,069	50,466	-	-	42,498
Fergusons Irish Linen	1,844	1,833	1,873	1,654	1,449
Gosford Forest Park	-	-	51,606	58,081	47,051
Kinnego Marina	343,927	158,448	174,365	216,000	209,027
Lough Neagh Discovery Centre	93,105	-	133,004	131,559	133,437
Milford House Collection	900	1,200	1,500	1,200	2,000
Millennium Court Arts Centre	12,072	15,302	16,552	16,602	17,317
No. 5 Vicars' Hill	3,755	3,892	3,755	3,962	3,582
Oxford Island National Nature Reserve	319,079	296,606	314,202	217,353	220,928
Peatlands Park	95,000	100,000	90,000	95,000	126,123
Portmore Lough Nature Reserve	4,560	4,500	10,000	12,000	12,000
Royal Irish Fusiliers Museum	10,218	10,847	11,269	12,630	11,286
Tannaghmore Gardens and Rare Breed Animal Farm	85,000	-	30,686	109,207	139,435
The Argory	32,500	33,500	35,096	36,483	38,000
The Navan Centre and Fort	45,000	45,200	50,792	49,328	44,016
William McCrum Park	-	-	-	-	6,000

Source: NISRA<sup>3</sup>

- None of the top 10 attractions in Northern Ireland are located within the Borough;
- The Borough's attraction market is dominated by public sector provision, often available 'free' or at subsidised admission;
- The findings indicate that attractions in the Borough are heavily reliant on the domestic Northern Ireland market indicating a particular dependence on day visitors;
- Most of the facilities above are about informal recreation and are geared towards residents;

<sup>3</sup> Figures for St Patrick's Church of Ireland Cathedral, Armagh not recorded as part of NISRA statistics

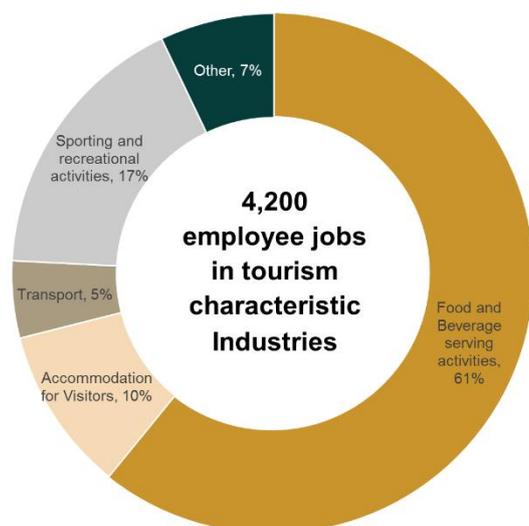
- Educational visitors (inclusive of outreach) account for 17% of visits in 2015, leisure groups accounted for 11% of all visits with and independent visitors accounting for 72% of all visits;
- Differing approaches are undertaken to the collation of visitor admission and profile data;
- By and large there are opportunities to significantly improve the retail and catering offer at attractions together with opportunities to provide high value personalised guided tours and events and;
- On the whole, attractions are working in isolation of each other and are therefore not providing a coherent narrative or cross-selling.

### 2.5.3 Jobs in Tourism Characteristic Industries

Employee jobs in tourism characteristic industries relate to a number of different business areas, most notably hotels and restaurants. In 2013 there were 68,000 employee jobs in Armagh City, Banbridge and Craigavon Borough, of which 4,200 or 6% were in tourism characteristic industries (the lowest proportion of the 11 councils).

Food and beverage is the most dominant employee sector with employment in the accommodation sector accounting for only one in every ten jobs in the Borough.

**Figure 6 – Employee jobs in tourism characteristic industries by type, Armagh City, Banbridge and Craigavon, 2013**



Source: NISRA, Tourism NI annual statistics and NI Census of Employment 2013.

## 2.6 Evening Economy

To date significant investment has also been made in heritage-led regeneration initiatives in urban locations across the Borough. There has also been a notable growth in the hospitality sector in recent years with substantial investment from the private sector in restaurants, cafes, bars and entertainment including a number of award-winning businesses. Armagh City Centre was successful in achieving the Association of Town Centre Management Purple Flag accreditation in July 2015. An Evening Economy Strategy for the Borough has recently been commissioned and will focus on development of action plans for the Borough’s urban areas in relation to each of the following aspects:

- A welcoming, clean and safe town centre
- Movement - A secure pattern of arrival, circulation and departure
- Appeal - A vibrant choice and rich mix on entertainment and activity
- A stimulating destination and a vital place

## **2.7 Events**

In excess of £1.2mn is spent on events across the Borough. These comprise both Council run and Council funded events. Although these vary in number from year to year, for 2016 on average there were in excess of 60 such events annually. These vary in nature from sporting events to music, arts, to literary, choral to generic seasonal and civic events.

The majority of these are of appeal to the local resident and domestic Northern Ireland market and therefore do not fit with the Tourism NI agenda of growing out-of-state visitors. Other events are unique to the Borough and have already been successful in developing an international audience. There is a third category of event which can help reinforce the unique strengths of the Borough and therefore, with the appropriate assistance, have the potential to strengthen the appeal of the Borough as a tourism destination.

Overall there is a requirement to determine which events are community based and which have genuine potential to drive tourism visits.

This is discussed as part of the action plan recommendations.

## 2.8 Strengths, weaknesses, opportunities and threats

Figure 7 – S.W.O.T. Analysis

In conclusion the SWOT analysis for the Borough is summarised as follows:

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• some great heritage product and opportunities (but needs packaged/managed)</li> <li>• the Georgian architecture of Armagh</li> <li>• geographic location as a touring base</li> <li>• accessibility</li> <li>• home of St Patrick</li> <li>• heritage of the Armagh Bramley Apple (PGI) and orchards</li> <li>• some excellent events with potential to help grow international visitor appeal</li> <li>• supportive local authority with committed tourism team and numerous tourism assets</li> <li>• private sector businesses enthusiastic for change and progress</li> </ul>	<ul style="list-style-type: none"> <li>• primarily a day trip destination</li> <li>• VFR accounts for majority of tourists</li> <li>• leisure tourism performance poor</li> <li>• no coherent identity for the destination</li> <li>• on-line presence confusing</li> <li>• private sector investment and collaboration comparatively low</li> <li>• product offering fragmented</li> <li>• marketing of the destination is non-visible</li> <li>• quality and standards of product/service lacking</li> <li>• supporting infrastructure poor</li> <li>• opportunity to spend is low</li> <li>• evening/Sunday economy</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• recognising that Armagh has the concentration of assets that may appeal to those markets, then create the links to move visitors around the destination</li> <li>• off peak accommodation capacity in the short-run</li> <li>• focussing on key markets and delivering experiences that are better than elsewhere, rather than trying to be everything to everyone</li> <li>• a range of unique stories and themes which could have a resonance in international markets</li> <li>• using its accessibility (esp from the A1) to “pull visitors to, and around the destination”</li> <li>• working collaboratively to establish the destination as a base for all of Northern Ireland</li> <li>• taking leadership and management of the destination – giving it a voice and working with TIL and TNI to help promote/develop it</li> <li>• adopting a quality focussed approach</li> </ul>	<ul style="list-style-type: none"> <li>• do nothing</li> <li>• some competing destinations can outspend ABCBC – there is a need to be smarter than those competitors in marketing</li> <li>• new developments in other destinations (esp. Belfast)</li> <li>• trying to compete directly with Belfast and the Causeway Coast</li> <li>• staff skills and ability at a local level need improved</li> <li>• being “rigid” about which attractions tourists choose to visit – they have no respect for council boundaries</li> </ul>

### **3. WHERE ARE WE GOING?**

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#### **3.1 Introduction**

The Borough is starting from a low base in terms of current tourism performance as outlined in Chapter 2. There is much work required in relation to improving the quality of the tourism experience across the Borough. However, one of the key findings from the research and consultation undertaken is that the basics, in terms of destination appeal are there and the potential for growth is significant. This growth is based on the following:

- The Draft Tourism Strategy for Northern Ireland is centred on attracting an out-of-state spend of £1bn by 2025;
- Demand from the Culturally Curious segment will be one of the main drivers of the forecast growth in tourism to the island of Ireland and Northern Ireland. Prioritised investment in the destination's assets will be of significant appeal to this segment;
- Allied to this is the fact that the destination contains histories, stories, themes and potential visitor offerings which are unique to this destination and importantly have a strong resonance in a national context;
- As well as themes, the destination is strategically well located within comparatively short drive times of Belfast and Dublin, the major points of entry for visitors, together with excellent rail links to the Portadown hub. In addition, the destination can easily act as a base for visitors to tour the entire island.

The challenge is creating the narrative and linkages including cross-border linkages, upgrading the product, visitor experience and events in line with international visitor requirements, making it easy for visitors to source information on the destination including online booking options and working with national agencies to raise the destination's profile in key out-of-state markets.

#### **3.2 Assumptions**

Section 3.3 outlines headline targets. The assumptions that underpin the growth targets are:

- a) growth is coming off a small demand base. Therefore, it is not unreasonable to assume that demand can increase at a higher rate than may be expected for Northern Ireland overall (spending growth is estimated at around 6.5% per annum on a Northern Ireland wide basis to 2025 – no estimates have been provided on the expected growth in overnight stays);
- b) the development of the key tourism products will occur at the start of this strategy (but not in advance of 2017), thereby improving the appeal of the destination. Appropriate branding, web-site development and marketing will take place concurrently as will collaboration with the key tourism agencies to develop the identity of the destination;
- c) new accommodation product will be developed over the lifetime of the strategy some of which will come to market sooner, rather than, later. Such development is important in creating opportunities in key markets and in the development of key products and market opportunities;
- d) quality standards can be improved at product on the ground (both attractions and accommodation);
- e) pan regional recession or adverse exchange rate movements do not affect the number of out of state visitors to the island; and

- f) “hard” border controls are not introduced in the wake of the recent UK “Brexit” referendum.

### **3.3 Key Headline Target**

The key headline target for the destination to 2022 is a target 10% annual increase in the value of the Borough’s tourism economy from 2016 with a baseline spend figure of £22.5mn in 2015 (based on current metrics).

## 4. STRATEGIC APPROACH

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### 4.1 The vision

The 5 year tourism vision for the destination is

***“to be a market leading cultural tourism destination in Ireland by 2022”***

### 4.2 Mission

The mission is:

***“to collaborate and take full advantage of a new progressive approach and innovative environment, to nurture and give direction to the development of sustainable tourism in the ABC area leading to social and economic benefits for everyone who lives, works and visits this part of Northern Ireland and to make a growing contribution to the overall appeal of Ireland in the international tourism markets”***

### 4.3 Guiding Principles

A series of principles will guide the development of the destination as it moves from a relatively embryonic stage to a developing tourism economy. The principles are:

- Adoption of a value versus volume proposition. The tourism offer in its widest sense will be developed on the basis of appealing to the higher spend Free Independent Traveller as opposed to pursuing a strategy of purely higher volume, lower yield business. In line with this the primary focus will be on generating overnight stays.
- Allied to the above and in line with Tourism NI and Tourism Ireland strategies, Mature Cosmopolitans and Culturally Curious segments in primary out-of-state markets will be the principal focus of activity for the destination team.
- There will be an emphasis on authenticity, differentiation and innovation in product development. In particular, taking a design-led approach to Council-led investment and influencing partners to follow a similar approach to create iconic developments will be important.
- Adopting a sustainable development philosophy to ensure the creation of a more commercially sustainable sector in partnership with the private sector.
- Adopting a Responsible tourism approach and pursuing associated accreditations to gain national and international recognition.
- Taking a local authority-driven approach to development of the destination with clarity of purpose and leadership uppermost together with a recognition that success will not happen overnight and there requires to be a commitment by all to growing the tourism economy. Effective communication and co-operation with delivery partners such as the private sector, government agencies and national tourism agencies will be central to ensure success.

- Utilising the new Council powers to effect positive change and adopt a flexible, rapid and innovative approach to planning with the emerging Local Development Plan an enunciation to opportunity, not a barrier to innovation.
- Pursuing a hub approach to the development of the destination in recognition of the fact that investment requires to be prioritised where there is most potential for international growth whilst ensuring that the economic impacts are delivered Borough wide
- Building capacity and capability across all stakeholders including Council understanding of the business of tourism.
- The ABC Tourism, Arts & Culture team must strive to be better than all other council teams – this will help drive the destination forward and instil confidence in the private sector

#### **4.4 Strategic Priorities**

A tiered approach with regard to the development of the destination will be employed as outlined below:

- **Tier 1** – these initiatives will be given priority focus from a financial and human capital perspective. These initiatives are capable of assisting the destination to stand out in a crowded market and will respond to the requirements of international travellers. These initiatives will help reinforce the brand proposition for the destination, and will be pursued over the period of the strategy (2017-2022).
- **Tier 2** – these initiatives will support the Tier 1 products and initiatives by broadening the overall appeal of the destination through exposure to new market opportunities. Although important they are secondary in terms of financial and human capital application.
- **Tier 3** – these are research and development initiatives which with further investigation may be suitable as tourism products beyond 2022. In the interim period these need explored and considered in future planning.

An overview of this strategic approach is outlined below.

##### **4.4.1 Tier 1**

There are six key interventions which will be implemented under the Tier 1 Strategic Priorities. These include:

- Establish Armagh City as the centrepiece of the destination
- Develop the Apple Orchards/Cider into an International Visitor Experience
- Actively pursue appropriate accommodation development opportunities with the private sector
- Invest in gateway projects of scale at the FE McWilliam Gallery & Studio
- Package visitor experiences based on the destination's unique stories
- Focus the destination's events programme

## **a. Establish Armagh City as the centrepiece of the destination**

Armagh is the ecclesiastical capital of Ireland and is home to the heads of the two principal Churches in Ireland. Being the oldest city on this island, it has a unique sense of place with a significance and influence felt for 6500 years. It has a true and rich historical and cultural history. Armagh is said to be the spiritual heart of this island. Armagh's ancient origins started at the Navan Fort where the ancient Kings of Ulster ruled and undoubtedly Saint Patrick's choice of Armagh as the seat of his great Church in 445AD was in large part due to the primacy of the city. The two St Patrick's Cathedrals, sitting proudly on opposing hills, dominate the skyline and although built centuries apart, are testament to the dedication of the City's people to associate themselves with the patron Saint.

Through sojourns by visiting kings, Viking raids and turbulent times, the city survived and once again felt the influence of a powerful visionary, this time, Archbishop Robinson. His vision, in the 18<sup>th</sup> Century, was to rejuvenate Armagh and have it become a University town. The City as it is seen today is as a result of Robinson's vision resulting in the wonderful array of Georgian architecture, said to be finest outside of Dublin. The statuesque Gaol at one end of the Mall has had a long and interesting history whilst buildings such as the Old Infirmary, the Royal School, the Observatory and Northern Ireland's oldest library (1771), the Armagh Public Library hint at an era of affluence and profound ambition.

Given Armagh's historical importance, wonderful architecture, cluster of heritage assets and the potential for innovation in relation to new tourism products a number of initiatives will form the basis of the tourism action plan as per below.

- **Armagh Gaol** – redevelopment of the former Gaol into a 4 star, boutique hotel with mixed residential and commercial use. This project has been at proposal stage for a number of years and it is anticipated that a complete funding package will progressed by the end of 2017. Should this not proceed within the above timescale, alternative uses for this building require to be actively pursued. Considerations include relocation of the Council offices from the Archbishop's Palace and release of same for alternative uses.
- **Reposition Navan Centre & Fort** – Navan Fort is an important historical and archaeological site and is on the tentative list for World Heritage Site Status (UNESCO) together with the Royal Sites of Ireland. The Navan Centre tells the story of the Fort and interprets the important myths and legends associated with this site. However, outdated interpretation and failing technologies at the Centre mean it is difficult for the Centre to offer the highest quality self guided experience for visitors. The Living History interpretation provided at the Centre and Iron Age Dwelling however is strong and allows for more interaction and a real immersive experience for visitors. The challenge is to determine the Centre & Fort's position within the overall narrative of the City and indeed how to maximise linkages with other royal sites. Evolving to become the centre for Myths and Legends in Northern Ireland together with the development of a related evening entertainment cultural experience may present a particular opportunity. In the meantime, World Heritage Site Status will be actively pursued with partner sites.
- **Heritage-led Regeneration** – The Council is proactively working on being selected for Townscape Heritage (HLF) funding by June 2017. Through this project restoration of key buildings of architectural and heritage merit will be secured with the aim of bringing them back into viable economic and social usages such as residential, commercial office and retail and hospitality uses to include restaurants, cafes and bars. To date a portfolio of 35 key properties have been

identified for inclusion in the scheme which will run to 2021. There are two zones, within the City's Conservation Area which have been identified for investment – Market Street/Upper English Street and Barrack Street/Scotch Street and all properties fall within these zones. There is also an opportunity to improve the **Sense of Welcome** to this important historical city at key approaches; currently this is limited.

- **Saint Patrick/Cathedrals & Peace & Reconciliation** – the Home of St Patrick International Festival has been successful in obtaining funding support from Tourism NI's International Events Fund (in conjunction with Newry Mourne and Down Council) over the 2016-2018 period. However, whilst Saint Patrick is a global 'brand' there is little recognition in international markets of the patron saint's association with Armagh. There is an opportunity to reinforce this authentic association and to highlight the impact he had on the spread of Christianity throughout Europe together with relevance of his teachings in the modern day world through a series of measures. The two St. Patricks Cathedrals represent the physical manifestation of his presence in this city and opportunities to ensure the highest possible visitor experience at these two centres will be explored in conjunction with the church authorities.
- **Museums Development** – the City has a number of accredited museums including the County Museum at the Mall, No 5 Vicars' Hill and Armagh Public Library. The Craigavon Museum Service is also an accredited service. Both the County Museum and the Royal Irish Fusiliers Museum have significant collections which are not displayed due to lack of space in their museums. An assessment as to the future scope of the destination's museum service will be undertaken.
- **Observatory & Planetarium** - The Armagh Observatory is the oldest scientific institution in Northern Ireland and the longest continuously operating astronomical research institute in the UK and Ireland. The cultural and heritage importance of Armagh Observatory and Planetarium is significant. It was founded in the late 18th Century, through the 1791 Act, passed by the Irish Parliament for "*settling and preserving a Public Observatory and Museum in the City of Armagh for ever*". The addition of the Planetarium on the same site in 1968 has greatly enhanced the organisation's public face and outreach activities. The fact that this is an active Observatory with a vibrant research, education and public outreach programme strengthens its status nationally and internationally. The Observatory's meteorological records provide the longest daily climate series from a single site in the UK and Ireland, one of the longest such records in the world. Proposals for the development of a new building on this site centre around innovation and should actively be supported and pursued.
- **Lighting Strategy** - Armagh City boasts an amazing history, a strong architectural heritage, a world renowned observatory and is an important ecclesiastical centre. Together with the wider County it plays host to a number of successful cultural and sporting events. Unlike bigger cities such as Belfast and Londonderry, it also offers quiet and tranquillity, an easy escape from the hustle and bustle of urban life. Lighting has been used successfully as a tool to promote tourism by a number of cities around the world from Lyon in the South of France, to Glasgow in the UK, both of which have used lighting as an integral part of their re-branding as international tourist destinations. Armagh already has a track record of night time events and using lighting, for example in conjunction with the Georgian Festival. Improved lighting in public spaces helps to engender civic pride, aids the reduction of anti-social behaviour at night, making the night time environment more welcoming for families, and as such is a fundamental part of building more sustainable communities. The Lighting Strategy was undertaken for the City in 2013 and provides recommendations on public lighting and feature lighting to showcase buildings and spaces. The Council will revisit this strategy to ensure the recommendations are in line with the proposed new narrative for the City with a view to implementation of a lighting action plan.

- **Design** – the use of iconic design in the development of new/extensions of buildings and redevelopment of existing buildings for tourism and hospitality use will be explored in full. Formulation of design guidelines which will inform this process will be drawn up and the planning department of the Council will employ these principles in discussion with appointed project architects at pre-application stage. Particular opportunities for implementation of iconic design include implementation of the Townscape Heritage project in the City, at the proposed new Observatory/Planetarium development, and as part of the extension at the Gaol.
- **Participation in International Networks** – there are a range of international networks (UNWTO and UNESCO) which have a resonance with the Armagh City and the associated ambition to become recognised internationally. These affiliations will be explored and considered with a view to the destination becoming members of same.

#### **b. Develop the Apple Orchards/Cider into an International Visitor Experience**

County Armagh is widely known as the Orchard County, with apples having grown in the county for 3000 years. The Bramley apple was first brought to Armagh in 1884, when Mr Nicholson bought 60 Bramley seedlings from Henry Merryweather and introduced them to Northern Ireland. By 1921, 7000 acres had been planted and Bramley had become the principal variety in Armagh. Processing of the apple started in 1903 and Northern Ireland's leading processors are still based in County Armagh, near their main supply, the orchards of the county. The orchards are a key natural resource of Armagh with 4000+ acres of Orchard land particularly in North Armagh. The European Commission awarded Armagh Bramley apples protected geographical indication status (PGI<sup>4</sup>) which promotes and protects names of high quality food and drinks. In May time, the North Armagh countryside is awash with pink blossom and at harvest time the trees laden with fruit. Apart from the scenic qualities, the associated produce is outstanding with a number of the ciders produced locally being international award winners. Northern Ireland's current licensing legislation does not however allow for purchase of ciders by visitors from the producers premises. The introduction of a new category a license – a Producers License, is being sought by cider producers. The apple industry is in need of support. Like many farming enterprises, it has no young people coming into it because they can see no future. With a vibrant local cider industry, apple requirements will increase and with it better returns for the growers. The Council will work in co-operation with the producers to effect a change in the legislation; Council's number one priority is to grow the local economy and the agri-food sector is a priority growth sector. This will also help to secure a legacy from the Council's recently introduced Food Heartland initiative which seeks to promote and showcase the abundance of specialist artisan food & drink producers to locals and visitors. In addition and in acknowledgement of the uniqueness, authenticity and quality of the artisan produce, a programme

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<sup>4</sup> PGI legislation came into force in 1993 and is a system for the protection of food names on a geographical or traditional recipe basis. The scheme highlights regional and traditional foods whose authenticity and origin can be guaranteed. These are products which must be produced or processed or prepared within the geographical area and have a reputation, features or certain qualities attributable to that area.

of targeted investment and support will be pursued in conjunction with growers and producers to ensure the delivery of high quality visitor experiences.

### **c. Actively pursue appropriate accommodation development opportunities with the private sector**

As highlighted in Chapter 2 above, the supply of visitor accommodation is one of the lowest of all LGDs in Northern Ireland and if left to remain will have a serious impact on the destination's ability to grow and become a real driver of the economy. Therefore it is important that the destination is viewed by the private sector as being open for business in relation to new visitor accommodation. Particular needs in this regard include provision of minimum 4 star boutique hotel accommodation in Armagh City to be based in buildings of historic significance (Gaol, Archbishops Palace, Courthouse etc.), provision of licensed guest inn accommodation in Armagh City and the surrounding rural orchard hinterlands, high quality B&B and Guesthouse accommodation in Armagh city again in buildings of heritage merit, budget hotel accommodation near Banbridge on the main A1 economic corridor between Dublin and Belfast and a conference hotel at Craigavon to support the needs of the global companies located here. Plans for the provision of accommodation at Brownlow House will also be supported. Proposals are also being developed for Gosford Forest Park which make provision for 5 star log cabin accommodation as part of a wider redevelopment and update at the Park while consideration will be given to country house style accommodation at the Manor House at Loughgall, should this become available as part of the Loughgall Country Park masterplan proposals.

Beyond the above identified visitor accommodation needs the Council will work in conjunction with developers of other schemes particularly where such schemes reflect the needs of international travellers and add to the stock of higher end, unique accommodation.

In order to facilitate this growth a development prospectus to include a folio of suitable sites will be formulated and updated regularly. This will be coupled with active targeting of prospective developers. This will require a cross-departmental Council response inclusion Tourism, Regeneration and Planning department. Consideration should also be given to acquisition of suitable properties by the Council as these come on the market with a view their future use as visitor accommodation.

### **c. Invest in gateway projects of scale at the FE McWilliam Gallery & Studio**

The FE McWilliam Gallery and Studio located just off the A1 outside Banbridge is an accredited museum and 4 star visitor attraction. It opened in September 2008 and celebrates the work of the sculptor, Frederick Edward McWilliam, who was born in Newry Street, Banbridge in 1909. A contemporary and friend of Henry Moore, McWilliam made his name in London and established a reputation as one of the most important sculptors of his generation.

Since it's opening the Gallery and Studio have been extremely successful, attracting c. 45,000 visitors per annum and initiating and attracting touring exhibitions of national and international significance. The catering outlet has proved a particular success with a local firm, Quails being the franchisees. Given its strategic location in the main visitor route between Dublin and Belfast and the potential which this offers as a key gateway to the destination together with the excellence of visitor proposition and the potential for further growth, the Council will invest in an expansion of this facility. Expansion plans include, an additional Gallery space to provide improved public access to the F.E. McWilliam Collection, more retail space to showcase crafts and products from the Borough, an education room which could accommodate coach tours, school groups and private events and relocation of the Visitor Information Centre from Banbridge Town Hall to the building.

In addition, there is an opportunity to further bolster that this as a primary gateway to the destination through the provision of public art of scale, on a site adjacent to the Gallery and just off the A1. This gateway project, included in the Banbridge Master Plan, has the potential to become an iconic symbol for the Borough and to direct visitors to the Gallery, to Banbridge and on to Craigavon and Armagh.

#### **d. Package visitor experiences based on the destination's unique stories**

The destination has a rich heritage and a number of stories which are unique. However these tend to be either difficult for visitors to source or are not as yet sufficiently developed so as to be visitor ready. We believe there are particular opportunities in relation to developing experiences for the international market and packaging in relation to the following:

- **The Orange Cultural Product** – including the site of the Battle of the Diamond (outside Loughgall), Sloan House (Loughgall village), Brownlow House (Lurgan) and Carleton Street Orange Hall (Portadown). Co-operation on a cross-border basis with the Battle of the Boyne site should be pursued.
- **Linen** – to maximise the opportunity for out-of-state trips and being particularly relevant to Banbridge and surrounding areas with Fergusons Linen Factory and its world famous linen one of the centrepieces of this story.
- **Saint Patrick** – much investment has already take place in the development of a car touring route with other local authorities together with the Saint Patrick's Way: The Pilgrim Walk running between the Navan Centre & Fort and St Patrick's Centre in Downpatrick. There is also growing interest from the North American market for pilgrimage, faith based and choral tours with Armagh as a centrepiece for many of these. Opportunities to target these specialist groups should be pursued in conjunction with Tourism Ireland.
- **Artisan Food & Drink** – as highlighted above, cider production is one of the destinations leading agri-food products. However there are a wide array of artisan producers in the area with the recently formed Food Heartland Hospitality Forum leading the way on communicating the quality of our local produce. Opportunities to package food and drink tours/offers as part of key events and beyond will be actively pursued including as part of the masterplan proposals at Loughgall Country Park whilst the Food & Cider Festival will continue to act as a showcase for local produce and excellent cooking.
- **Literary Tourism** – opportunities to dovetail with Tourism NI and Tourism Ireland initiatives in relation to literary tourism will be explored with specific reference to the Borough's connection with the Brontes, Jonathan Swift, John Hewitt, AE Russell, John O'Connor and other literary figures.

#### **e. Focus the destination's events programme**

As previously highlighted Council's annual spend on events is £1.2mn with over 60 Council-led and external events being hosted. This is not a position which can be sustained over the long term particularly from a human resourcing perspective. As such there should be a refocusing of the events programme with Council-led Signature events selected on the basis of ability to reinforce the new international proposition for the destination, being based in and around the destination hub and are events which are unique to this area and as such have a rightful home here. Importantly such events with appropriate investment, professional development and capacity building, should have real potential to grow the international visitor market over the medium term. The proposed Signature events are:

- Home of St Patrick Festival
- Food & Cider Festival
- Georgian Festival

Each event needs a carefully considered event development and management plan, defining size, scale, location and associated funding model.

Beyond the above Council-led events we recognise that there is merit and value in the events provided by external event organisers which are hosted across the entirety of the Borough with a number of these serving to promote sporting excellence, showcasing of our rural heritage and allowing for cultural participation. It should also be highlighted that a number of these events are long established with extremely professional, specialist and dedicated organisations running such events to excellent standards. To this end the Council will ring-fence funding for these external events with the Financial Assistance Policy utilised as the mechanism for same.

In addition, a **limited** Commercial Events Fund will be created to allow individuals and commercial organisations to apply for commercial sponsorship from the Council on the basis of clear demonstrable need for financial intervention. Economic impacts, proven national and international PR benefits for the destination and financial support from other agencies and commercial enterprises will be key considerations in determining eligibility for funding.

Opportunities to bid for events which will raise the profile of the destination internationally and which can be accommodated using existing infrastructure will be actively investigated. The above referred to Commercial Events fund will also be utilised for this purpose.

#### **f. Professional Approach to Marketing, Sales & Communications**

It is not practical to give the destination an identity that retains all of the names of the former council districts. To do so would be meaningless to potential visitors, could confuse, will be cumbersome to promote and will not work. As recent research undertaken by Tourism NI strongly indicates that Banbridge and Craigavon are more leisure orientated and that Armagh does have an authentic USP and supporting product, then it is recommend that the destination be marketed as Armagh (with an appropriate tag line such as "Visit Armagh"), since it has the critical mass of attractions that stand the best chance of attracting out-of-state visitors. While this is the 'hook', the economic return will be experienced across the Borough through spend on accommodation and in restaurants, cafes and retail outlets.

#### 4.4.2 Tier 2

Tier 2 initiatives comprise the following opportunities.

- **Genealogy & Ancestry** – family history is of interest to many overseas visitors. Many of the museums in the area can provide information of relevance to people researching their ancestry. Armagh Ancestry and Banbridge Genealogy resources are not fully available online. Council will explore the opportunity to make these databases available on line with appropriately trained staff located in the main Visitor Information Centres or in a museum.
- **Screen Tourism** – the Games of Thrones™ has changed the tourism landscape in a short period of time with coastal counties in Northern Ireland being particular beneficiaries of the growth in international visitors wishing to see the associated film locations. The series was also in part, filmed at Studios outside of Banbridge. Over the years, various productions have been based in the destination with most recently the Chronicles of Frankenstein being filmed in part in Armagh city. There has been sporadic interest since from other productions in using the heritage assets of Armagh city as locations and back drops. Discussions will be held with NI Screen to explore further opportunities for future collaboration across the Borough.
- **Discretionary Business Tourism** – the opportunity to attract small conferences which support the destination messaging will be investigated. These could centre around Peace, architecture, agri-food, heritage etc.
- **Activity Tourism** – walking, cycling, angling, horse-riding and other activities provide additional things for visitors to do when staying in a destination. The Tourism Department of the Council will work in conjunction with other Council departments to support the promotion of such activities, particularly as part of packages where appropriate.
- **Gosford Forest Park** – proposals for the development of Gosford Forest Park have been formulated and make provision for enhancements in visitor amenities, a major themed play facility Gulliver’s World, together with the provision of 5 star log cabin accommodation.

#### 4.4.3 Tier 3 – Research & Development Projects

- **Lough Neagh** - The Lough Neagh Wetlands are made up of Lough Neagh, Lough Beg, the satellite lakes, associated waterways and low-lying surrounding hinterland. Lough Neagh has a number of listings and designations including Area of Scientific Interest (1965) re-designated ASSI (1992), Ramsar Site from 1973, 8 Nature Reserves and Special Protection Area (from 1998). The bed and soil and sporting rights are owned and leased by Shaftesbury Estates. Heritage Lottery funded the Lough Neagh Landscape Partnership Scheme (LPS) which commenced in 2016 for a period of five years. The LPS will be implemented by Lough Neagh Partnership, via a dedicated Landscape Partnership team. The Scheme consists of a series of nine programmes: Archaeological Site Investigations; Exhibitions; Experimental Archaeology; Heritage Skills; Cultural Heritage; Schools; Publications and Media; and Conservation and Access.

In early 2016 a conference with all stakeholders in relation to the future of Lough Neagh was hosted and included discourse on its ownership, management, navigation, water quality and recreational potential. It is apparent that Lough Neagh is an important environmental resource

for the Borough and that there are numerous issues which will require to be addressed and resolved on a Lough wide basis in order to secure and protect its long term sustainability. The Council will continue to be an active partner in relation to these discussions, working to ensure the conservation management of the Lough. A masterplan for Oxford Island will be formulated in 2017 to consider future potential uses. The tourism team will continue to engage in this process.

#### **4.4.4 Evaluation & Monitoring**

A series of performance measures against agreed baselines will be utilised to monitor and assess the impact of the strategy.

## 5. ACTION PLAN

The action plan has been categorised into four key areas of activity including:

- Marketing, sales, communications
- Product Development
- Events
- Facilities
- Industry Capacity Building

### 5.1 Marketing, Sales & Communications

The key segments which will be the focus for marketing, sales and communications activity are culturally curious in international markets and Mature Cosmopolitans in the Republic of Ireland market. The focus of activity will be out-of-state.

**Figure 8 – Marketing, Sales & Communications Action Plan**

Marketing, Sales & Communications Actions	Responsibility	Completion	Estimated cost to ABCBC £
Development of Destination narrative and positioning including consumer focused destination name	ABCBC	Spring 2017	£5,000 in 2017
Development of suite of collateral including on and offline	ABCBC	Spring 2017	£60,000 in 2017
Digital marketing & sales plan in place	ABCBC	Spring 2017 and annually	£40k in 2017 - £100k by 2020
Work in conjunction with Tourism NI in the island of Ireland and Tourism Ireland internationally. Explore potential joint campaigns, providing match funding	ABCBC	In place Spring annually	£60k in 2017 - £150k by 2020
Development and delivery of a consumer sales plan, supporting overall marketing effort in key markets.	ABCBC	In place Spring annually	£15k in 2017 - £40k by 2020
Development of a coherent approach to communications placing key PR message in key markets supporting marketing and sales plans	ABCBC	In place Spring annually	£15k in 2017 - £40k by 2020
Put a marketing/sales/comms team in place and invest in team development	ABCBC	Spring 2017	Existing resources
Establish a research and monitoring framework to allow evaluation of marketing, sales and communications activity	ABCBC	Spring 2017	£10k in 2017 - £25k by 2020
Development of a commercial sales plan targeting tourism, hospitality and specialist retail businesses to invest in the Borough.	ABCBC	Summer 2017	£15k in 2017 - £30k in 2020

## 5.2 Product Development

The product development actions relate in large part of the strategic tiered approach as set out in Chapter 4.

**Figure 9 – Product Development Action Plan**

Product Development Actions	Responsibility	Completion	Estimated cost to ABCBC £
<b>Tier 1</b>			
<b>Establish Armagh City as the centrepiece of the destination</b>			
Armagh Gaol	ABCBC	Determine what will happen by Dec 2017	£4m capital
Reposition Navan Centre & Fort (including WHS status)	ABCBC	Spring 2017	£0.5m capital
Heritage-led Regeneration, Design & Armagh City Lighting Strategy	ABCBC/Planning/public bodies	Ongoing	£300k contribution to lighting strategy
Saint Patrick/Cathedrals, Peace & Reconciliation, Visitor Management & Attractions enhancement	ABCBC / Cathedrals /TNI / TIL/Industry	Spring 2017	£1.6mn / £50k p.a. staff time
Museums Development	ABCBC	Progressed by Dec 2017	£2.5mn
Armagh Planetarium & Observatory	Dept for Communities	TBA for redevelopment	TBA
International networks membership	ABCBC	Dec 2017	£25k p.a.
<b>Develop the Apple Orchards/Cider into an International Visitor Experience</b>			
Create exceptional experiences at 2 orchards	ABCBC/Pvt sector	Commence 2018	£1.0m capital
Work with industry to lobby Dept for Communities re: licensing	ABCBC	Ongoing	£nil
Develop touring trail & curated experiences	ABCBC/other LGAs/TNI/ Pvt sector	Autumn 2017	£30k
<b>Actively pursue appropriate accommodation development opportunities with the private sector</b>			
Prepare development prospectus / update annually / attend shows	ABCBC	Summer 2017	£5k per annum for off/online prospectus / £5k per annum for show attendance
Gosford Forest Park development	ABCBC/Forestry Service	Spring 2018	Leisure & Community Service budget
Archbishop's Palace / Demesne	ABCBC / possible private sector investor	Spring 2020 if redeveloped as hotel	TBA

<b>Product Development Actions</b>	<b>Responsibility</b>	<b>Completion</b>	<b>Estimated cost to ABCBC £</b>
<b>Invest in gateway projects of scale at the FE McWilliam Gallery &amp; Studio</b>			
Expansion/enhancement of Gallery	ABCBC	Spring 2018	£1.3m capital
Sunday opening	ABCBC	Spring 2017	£25k per annum
Relocate Banbridge VIC	ABCBC	Spring 2018	£100k capital
Display additional collections	ABCBC/NMNI/Nat Museum of Dublin / TNI / TIL	Spring 2018	£100k per annum
A1 Public Art Installation	ABCBC	Autumn 2018	Tbc
Public Realm & Gateway signage	ABCBC / Roads Service	Summer 2017	£1m
<b>Package visitor experiences based on the destination's unique stories</b>			
Develop 3 themed packages	ABCBC/Industry Organisations/Other LGAs	Summer 2017	£20k in 2017 – £30k in 2020
<b>Tier 2 – Supporting Projects</b>			
<b>Genealogy &amp; Ancestry</b>			
Deliver genealogy services at TICs	ABCBC	Summer 2017	£5k
Staff training	ABCBC	Summer 2017	£5k
Make databases available on-line	ABCBC	Summer 2018	TBC
<b>Screen Tourism</b>			
Collaborate with TIL & Screen NI to promote the Borough	ABCBC/Screen NI/TIL	Summer 2017	£2k per annum
Collate list of locations for filming	ABCBC/Screen NI	Summer 2017	TBC
<b>Discretionary Business Tourism</b>			
Create pool of specialist small conference ambassadors	ABCBC/TNI	Summer 2018	£5k per annum
Create subvention fund to attract specialist small scale conferences	ABCBC	Summer 2018	£10k per annum
<b>Activity Tourism</b>			
Work in advisory capacity on activity tourism initiatives	ABCBC	Ongoing	-
<b>Tier 3 – Research &amp; Development Projects</b>			
Act in an advisory capacity on the LN LPS	ABCBC	To 2021	-
Engage in Oxford Island Masterplan process	ABCBC	End of 2017	-

### 5.3 Events

Figure 10 – Events Action Plan

Event Actions	Responsibility	Completion	Estimated cost to ABCBC £
Establish a Council Events team	ABCBC	Spring 2017	-
Prepare event development and dedicated marketing & PR plans for each of the 3 designated Council-led Signature Events	ABCBC	Summer 2017	£325k in 2017 to £450k in 2020
Work in collaboration with Tourism NI and Tourism Ireland on marketing and PR for Signature Events	ABCBC/TNI/TIL	Ongoing	Part of Signature Events marketing budget
Food Heartland Hospitality Forum members to act as advisory body in relation to food and drink aspects of Signature Events	ABCBC/FHFH members	Ongoing	Within event costs
Allocate tourism budget to Council Financial Assistance Programme to support external event providers to internationalise events which have potential to reinforce the destination brand	ABCBC	Spring 2017	£200k
Develop a commercial events fund for commercial sponsorship on the basis of clear demonstrable need for financial intervention and appropriateness to destination brand	ABCBC/Event organisers	Spring 2017	£50k annually
Events team to work in conjunction with external tourism event providers to maximise profile	ABCBC/Event organisers	Spring 2017 onwards	-
Bid for events that deliver international profile for the Borough	ABCBC/partners	Spring 2017 onwards	£65k annually to £100k by 2020
Continue to utilise civic ambassadors to promote Borough events eg Armagh Ambassadors	ABCBC/civic ambassadors	Ongoing	-

## 5.4 Facilities Management

Figure 11 – Facilities Management Action Plan

Facilities Management Action	Responsibility	Completion	Estimated cost to ABCBC £
Consider opportunities for relocation of Armagh VIC to Market Place Theatre, Armagh and explore possible expansion of arts, crafts and artisan food & drink provision.	ABCBC/TNI	Autumn 2017	£100k
Explore potential for relocation of Banbridge VIC from Banbridge Town Hall to expanded FE McWilliam Gallery & Studio	ABCBC/TNI	Spring 2018	Within Gallery capital costs
Review Visitor Information Point agreements for Lough Neagh Discovery Centre together with information points in Portadown and Lurgan	ABCBC	Autumn 2017	-
Review Council's position in relation to support for Arts provision at the Millennium Court Arts Centre, Portadown	ABCBC	Autumn 2017	-
Undertake options appraisal for catering at Market Place Theatre, Armagh	ABCBC	Spring 2017	-
Undertake scoping of the destination's combined Museum service.	ABCBC	Progressed by Dec 2017	TBA
Appoint funding officer team to source grant aid and commercial sponsorship opportunities for programmes and facilities	ABCBC	Summer 2017	From existing team

## 5.5 Industry Capacity Building

Figure 12 – Industry Capacity Building Action Plan

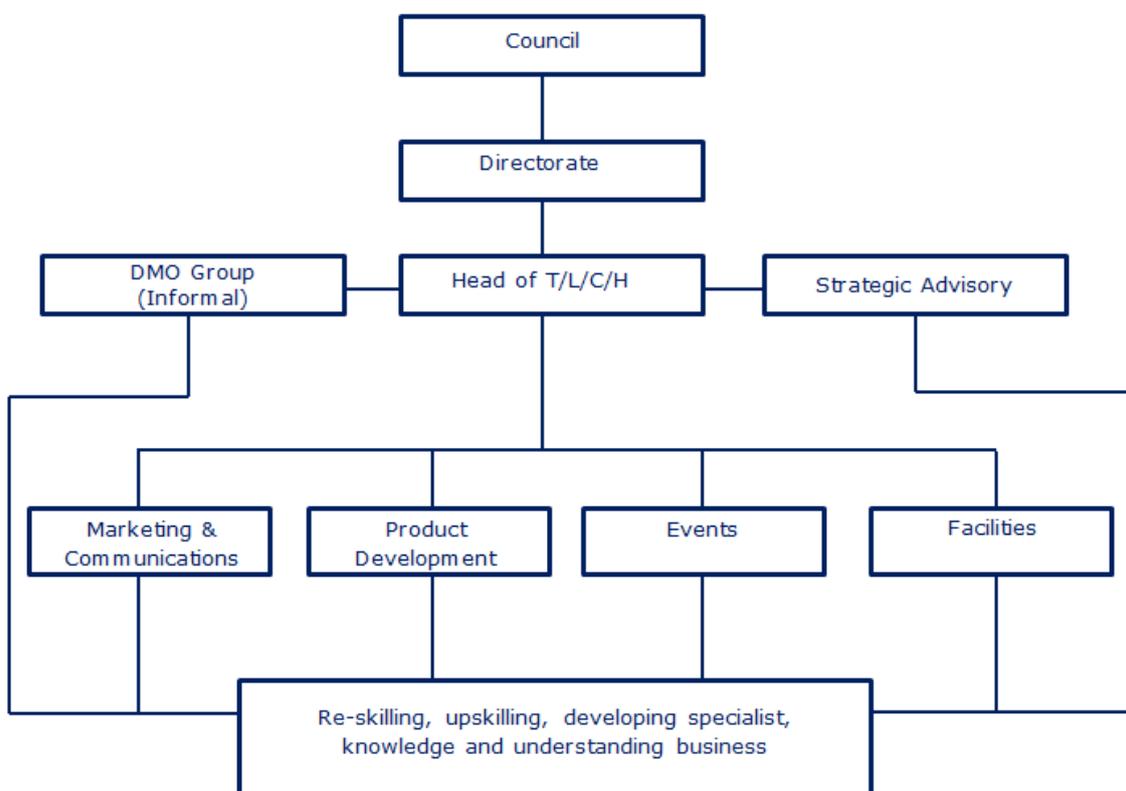
Industry Capacity Building Actions	Responsibility	Completion	Estimated cost to ABCBC £
Host Annual Tourism Conference	ABCBC	Spring annually	£10k annually
Review pilot Tourism & Hospitality Engagement Programme with view to future phases	ABCBC/Industry	Summer 2017	£20k annually
Explore opportunities to fund clusters of private sector businesses that assist in reinforcing the destination brand	ABCBC/Industry	Summer 2017 onwards	£50k annually
Collaborate with partners in the delivery of relevant industry focused tourism programmes	ABCBC/TNI/People 1 <sup>st</sup>	Ongoing	£15k annually
Develop a programme of learning journey visits for industry to destination/product exemplars	ABCBC/Industry	Ongoing	£10k annually
Explore opportunities for financial incentives to encourage industry to participate in Tourism NI and Tourism Ireland promotional platforms	ABCBC/TNI/TIL/Industry	Spring 2017 onwards	£10k annually
Provide advisory service to tourism and hospitality grant applicants in conjunction with Council Office colleagues	ABCBC/Industry	Ongoing	-
Develop digital industry communications strategy	ABCBC/Industry	Spring 2017	£2k annually

## 6. DELIVERY STRUCTURES

### 6.1 Structures

While the ABCBC Tourism, Arts & Culture Team should continue to be organised along functional lines responsibilities should apply across the entire destination and incorporate key themes set out in the action plans. On this basis, the team will be segmented into four clearly defined units (Marketing, Sales & Communications, Product Development, Events & Facilities management) with associated functions aligned to the action plan outlined in Chapter 5 (although fluidity in terms of working across departments will be fundamental to overall success).

**Figure 13 – Delivery Structures**



Alongside this approach there is a requirement for:

- a) a strategic advisory group (which should include people of influence such as the Archbishops of each Cathedral, individuals from TIL & TNI, someone with on-line marketing/promotional expertise and another with experience of working with the governments in both jurisdictions); and
- b) an embryonic DMO (Destination Management Organisation) body of key stakeholders. At present, we feel that the private sector in the district is not mature enough to support a DMO in which case ABCBC should act in this capacity for the foreseeable future (5 – 10 years). The role of the embryonic DMO will be:

- contributing to the development of product on the ground (such as touring trails) by making their businesses open and accessible and through collective working;
- identifying opportunities to improve the appeal of the destination, the product offer on the ground and the quality and level of service;
- providing information to ABCBC on tourism performance (see below);
- attending trade shows and learning journeys with ABCBC staff;
- lobbying TNI for support for the development of the destination; and
- providing input to ABCBC on marketing initiatives, future targets.

## 6.2 Tourism, Arts & Culture Team

Tourism is a highly competitive environment. Similar to business, those destinations that succeed tend to be those that best understand the environment within which they operate and which can, through information, know-how and flexibility, track their performance and the impact of interventions, understand changing customers need and be responsive to those needs. The industry together with the ABCBC Tourism Team must be sufficiently capable of delivering on all fronts if the Strategy is to be successful. Capacity and capability development will be an ongoing process.

**Figure 14 – ABCBC Capacity Building**

ABCBC Tourism Team Capacity / sustainability development		
Action	What ?	Objective / outcome
Become THE BEST organised, skilled, informed, committed, enthusiastic, equipped and trained tourism team	<p>in Northern Ireland....</p> <p>3 – 5 years: on the island of Ireland...</p> <p>Create a “working group” within ABCBC to identify limitations in Council staff skills and to address any deficiencies.</p> <p>Review annually and amend the programme accordingly.</p>	Improved performance as an aid to growth and sustainability.
Announce ‘open for business’ approach with a palpable ‘can do attitude’. Be a clear “case maker” for the destination.	“Hand hold” projects from enquiry, through planning and link with Economic Development. Make the case for funding where appropriate. Create a welcoming environment that will appeal to people to come and invest, develop new businesses and bring up their families geared to attracting and retaining talent.	Become THE point of reference in the Council for the industry/investors. Become the point of difference when compared to other LGAs.
Agree a new set of measures for success over a 3, 5 and 10 year period	Measure what’s relevant and important	Improved understanding of the impact of interventions and how the sector is creating economic wealth.
Implement standard data gathering and analysis	Basic information on tourism performance is currently lacking. There is a need for frequent and reliable information on the performance of the destination especially in terms of overnight stays and the reasons to visit	Regular gathering of basic data will improve understanding destination performance and lead to better decision making.

<b>ABCBC Tourism Team Capacity / sustainability development</b>		
<b>Action</b>	<b>What ?</b>	<b>Objective / outcome</b>
Improve customer care skills	<p>Identify programme to improve customer care across the hospitality and retail sectors. Include transport services in the programme (bus / rail staff / taxi drivers – such as World Host).</p> <p>Develop an awards ceremony to recognise excellence within the hospitality sector.</p>	Become recognised as the best at customer service in Northern Ireland.