



Comhairle Ceantair
**an Iúir, Mhúrn
agus an Dúin**

**Newry, Mourne
and Down**
District Council

**Local Development Plan
Preparatory Studies**

Paper 7: Tourism

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Purpose: To provide Newry, Mourne and Down District Council with an overview of Tourism in the district including the area's tourism assets and growth areas and how this fits in the context of regional and local plans.

Content: The paper provides:

- i. An overview of the regional policy context for tourism.**
- ii. Identification of Key Departments, Agencies and bodies with a role in tourism in Northern Ireland and their related strategies and plans;**
- iii. An overview of tourism policy within existing local area plans and masterplans;**
- iv. An overview of the tourism base and growth areas in Newry, Mourne and Down; and**
- v. Key Findings and conclusions**

1.0 Introduction

- 1.1 The purpose of this paper is to inform members about tourism within the District, by providing information on the existing tourism infrastructure and current and proposed tourism initiatives. This will assist the Council in the development of the Local Development Plan (LDP). It also provides an overview of regional planning and policy context in relation to tourism and includes other Government policy objectives in relation to this key sector, namely; the NI Executives Programme for Government 2011-15 (PfG), the Economic Strategy (2012), the Draft Tourism Strategy (2010) and the Council's vision taken from its Corporate Strategy (2015-2019) in addition to the current Draft Community Plan and Draft Tourism Strategy. It also identifies a number of key Departments, agencies and bodies with a tourism role in Northern Ireland and provides an overview of their strategies and plans for the District.
- 1.2 The paper allows members to commence consideration of the priorities for formulating a sustainable tourism policy in the context of Planning and the LDP to grow tourism in a manner which, in line with the Regional Development Strategy (RDS), balances the economic benefits of tourism with the environmental and social impacts.
- 1.3 There was a downgrade to the global Travel & Tourism outlook for 2016, compared to the forecast reported in 2015, with direct Travel & Tourism Gross Domestic Product (GDP) now expected to grow by 3.3%. This is in line with macro economy revisions (the world GDP growth forecast for 2016 is down from 3.1% last year to 2.8% under current forecasts). Despite this downgrade, Travel & Tourism sector growth is still expected to outpace global economic growth for the sixth consecutive year.
- 1.4 Tourism statistics published by NISRA show that in the year to June 2016 visitors spent £789m in the NI local economy with 72% coming from external visitors - making tourism worth £571m as an export business. This is an increase of 5% in overall visitor spend when compared to the year to June 2015. Figures indicate that visitors have generally been staying longer and spending more leading to an increase in overall visitor expenditure in both the first half of 2016 and the year to June 2016. The increases in nights and spend have been driven by a continued increase in external visitors particularly from GB and overseas. Total visitor numbers fell slightly during January to June 2016 driven mostly by falls in domestic overnight trips.
- 1.5 Through utilising existing environmental, historical, cultural and geographic assets, tourism can be a key economic driver capable of stimulating further growth and development opportunities. Tourism can benefit the assets on which it depends for example through assisting in the financing of conservation or enhancement initiatives. In towns and cities tourism can contribute positively to urban regeneration. In rural areas, tourism is important to the development of the rural economy by offering, for example, opportunities for farm diversification.

- 1.6 The World Tourism Organisation (WTO) promotes sustainable tourism and defines this as: *"tourism that meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future"*. It goes on to state that: *" the objective of sustainable tourism is to retain the economic and social advantages of tourism development while reducing or mitigating any undesirable impacts on the natural, historic, cultural or social environment."*
- 1.7 Sustainable tourism development is brought about by balancing the needs of tourists and the tourism industry along with protecting the assets of the destination. This requires management and the land use planning system has a key role in managing tourism-related development through planning policies that provide a framework for identifying appropriate development opportunities and safeguarding tourism assets from harmful development.

2.0 Regional and Local Policy Context

(a) Programme for Government 2011-2015 (PfG)

- 2.1 On 12 March 2012, the First Minister and Deputy First Minister (OFMDFM) published the Programme for Government: Building a Better Future. Included within the key commitments and strategic priorities set out for the Assembly term 2011 to 2015 is a key commitment to increase visitor numbers from 3.2 million to 4.2 million and tourist revenue to £676 million by December 2014. Through various Government Department Strategies, frameworks have been put in place to achieve the aims underpinning the PfG, which is to grow a sustainable economy, invest in the future, tackle disadvantage, improve health and wellbeing, protect people and the environment, build a strong and shared community and deliver high quality services. The Government therefore recognises the potential of the tourism industry to deliver significant economic growth in the future.
- 2.2 A draft PfG 2016-2021 was published on 28 October 2016 and was out for consultation until 23 December 2016. It recognises the economic importance of tourism and the huge growth potential in the tourism and hospitality industry. One of the key indicators is 'to improve our attractiveness as a destination' and will be measured by the 'total spend by external visitors'.
- 2.3 Aligned with the PfG the former Department for Enterprise, Trade and Investment (DETI) published the 'Economic Strategy: Priorities for Sustainable Growth and Prosperity' on 13th March 2012. The Strategy sets out the economic vision including a framework for growth and key priorities for growth and prosperity.
- 2.4 The Strategy reaffirms the PfG and includes developing the potential of the tourism industry through focusing investment on strategically significant areas and developing the quality of the visitor experience. The Strategy sets a collective goal for the sector to double the income earned from tourism by 2020.
- 2.5 DETI also published a draft Tourism Strategy for Northern Ireland to 2020 which is outlined in section 4 of this paper.

(b) The Regional Development Strategy 2035 (RDS)

- 2.6 The Regional Development Strategy 2035 was published in March 2012. It provides an overarching strategic planning framework to facilitate and guide the public and private sectors and ultimately shall influence Council decisions and investments for years to come. The RDS aims to protect and enhance the environment for current and future generations. It recognises that Northern Ireland's environment is one of its greatest assets which benefits in terms of the economy and quality of life. All new plans and planning policies must take account of the RDS. The following Regional Guidance (RG) in the RDS is relevant to this paper:
- 2.7 RG 4 – Promote a sustainable approach to the provision of tourism infrastructure by:
- Promoting a balanced approach that safeguards tourism infrastructure while benefiting society and the economy;
 - Improving facilities for tourists in support of the Tourist Signature Destinations, including The Mournes and the St. Patrick and Christian Heritage Trail, as identified in the former Department for Enterprise, Trade and Investment's draft Tourism Strategy 2010;
 - Encouraging environmentally sustainable tourism development.
- 2.8 RG 11 – Conserve, protect and, where possible, enhance our built heritage and our natural environment – which are key assets for attracting tourism and would continue to make a valuable contribution to our Tourism economy, as well as to the wider environment and society.
- 2.9 The spatial framework of the RDS identifies The Mournes, Strangford Lough and Coast and the Ring of Gullion as Strategic Natural Resources. It identifies Newry as a main hub and as the South Eastern City gateway due to its land border with the ROI and the major port of Warrenpoint which it has potential to cluster with. It also has potential to cluster with Dundalk given that both are located on the Belfast-Dublin corridor.
- 2.10 The RDS also recognises Downpatrick as a key tourism centre of regional significance due to its historical and archaeological interest largely connected to St Patrick. It notes it has potential to cluster with Newcastle which, with its surrounding natural landscape, has year round activity based tourism opportunities for walking, climbing, fishing, cycling and golf. However, it notes that Newcastle's location positioned between 2 Special Areas of Conservation, the Eastern Mournes and Murlough National Nature Reserve means that any development in and around the town needs to take account of the potential environmental impact.
- 2.11 The RDS also recognises that the expansion of rural tourism and associated development that is both sustainable and environmentally sensitive should be encouraged as it can provide further jobs and opportunities in rural areas (SFG13).

(c) Strategic Planning Policy Statement (SPPS)

2.12 The Strategic Planning Policy Statement for Northern Ireland (SPPS) was published on the 28th September 2015. The SPPS reduces 20 separate planning policy statements to one. This provides the policy on key issues including tourism.

2.13 The Regional Strategic Objectives for tourism are:

- Facilitate sustainable tourism development in an environmentally sensitive manner;
- Contribute to the growth of the regional economy by facilitating tourism growth;
- Safeguard tourism assets from inappropriate development;
- Utilise and develop the tourism potential of settlements by facilitating tourism development of an appropriate nature, location and scale;
- Sustain a vibrant rural community by supporting tourism development of an appropriate nature, location and scale in rural areas; and
- Ensure a high standard of quality and design for all tourism development.

2.14 In preparing Local Development Plans (LDPs) the SPPS recommends that Councils should consider how best to facilitate the growth of sustainable tourism in their areas and bring forward a Tourism Strategy. This will be tailored to the needs and assets of their local area and informed by early engagement with relevant stakeholders. Such a strategy should reflect the wider Government tourism initiatives (e.g. Signature Destinations) and may address the following: how future tourism demand is best accommodated; safeguarding the key tourism assets; identification of potential tourism growth areas; environmental considerations; and contribution of tourism to economic development conservation and urban regeneration.

2.15 The SPPS states that policies to safeguard tourist assets will be contained in the LDP, together with policies for tourism development such as tourism accommodation, amenity facilities, and holiday parks, and the criteria for consideration of such proposals. There should be a general presumption in favour of tourism development within settlements.

2.16 In the countryside there is a need, in the interests of rural amenity, and wider sustainability objectives, to manage the level of new build for tourism purposes. The guiding principle should be to facilitate tourism development where it supports rural communities and promotes a healthy rural economy and tourism sector.

(d) Planning Policy Statements (PPSs)

2.17 Planning Policy Statement 16 Tourism (PPS 16) was published in 2013 and is the main planning policy document relating to tourism development. It aims to manage the provision of sustainable and high quality tourism developments in appropriate locations within the built and natural environment and shares the objectives of the

SPPS. PPS16 allows for: appropriate tourism development in settlements; tourist amenities in the countryside where it is in association with a particular tourism attraction or the activity itself requires a countryside location; hotel, guest house and tourist hostels in the countryside where it replaces an existing rural building or new build on the periphery of a settlement; major tourist development in the countryside in defined exceptional circumstances; and self-catering accommodation in a number of scenarios.

- 2.18 Due to the importance of our natural and built heritage assets in relation to the tourism industry both Planning Policy Statement 2 Natural Heritage (PPS 2) and Planning Policy Statement 6 Planning, Archaeology and the Built Heritage (PPS 6) are frequent key policy considerations in planning applications for tourism. Other Planning Policy Statements that provide scope for tourism development in the countryside are Planning Policy Statement 8 Open Space, Sport and Outdoor Recreation (PPS 8) and Planning Policy Statement 21 Sustainable Development in the Countryside (PPS 21).

(e) Newry, Mourne and Down District Council Corporate Plan

- 2.19 The Council's mission as detailed in the Corporate Plan 2015-19 is to lead and serve a District that is prosperous, healthy, as well as sustainable from an economic, environmental and social perspective. The Council's responsibilities in relation to the environment will also play a key role in contributing to the tourism success of the District as well as making it an attractive place to live. The Corporate Plan recognises that the tourism potential is enormous in this district with three Areas of Outstanding Natural Beauty in Strangford & Lecale, Slieve Gullion, and the Mourne, numerous Blue Flag beaches, and an unrivalled link to St Patrick. The Council's challenge is to increase visitor numbers, dwell time and spend as part of an overall economic growth plan.

- 2.20 The Corporate Plan places a strong emphasis on tourism with a key strategic objective being:

"By 2019 we will have become one of the premier tourism destinations on the island of Ireland". Achievement of this ambitious objective depends, not only on the Council, but also on a wide range of businesses, organisations and individuals within the local area, and on statutory agencies that operate in the area.

- 2.21 The Council's 'Economic Regeneration and Investment Strategy 2015-2020' identifies tourism as one of five integrated themes. The tourism objectives of this strategy are to become the destination of choice in NI, to become NI's premier outdoor/ adventure destination and to become one of NI's finest events destinations.

(f) Newry, Mourne and Down District Council Draft Community Plan 'Living Well Together'

- 2.22 Community Planning came into operation on 1st April 2015 as part of the full implementation of local government reform. The new duty of community planning requires councils as the lead partner to be responsible for making arrangements for

community planning in their areas and it requires statutory bodies to participate in the process. The Council, statutory bodies and local communities will develop and implement a shared vision for promoting the well-being of the area, promoting community cohesion and improving the quality of life of its citizens.

- 2.23 The Community Plan is to be the overarching strategic plan for integrated planning and delivery of services in Newry, Mourne and Down. It provides a framework for the other strategies and plans the Council will put in place to contribute towards the outcomes in the community plan and it is based on a detailed analysis of future risks and opportunities for Newry, Mourne and Down.
- 2.24 A key outcome for the draft Community Plan is that all people in Newry, Mourne & Down benefit from prosperous communities. The level of tourism revenue in the District has been identified as indicator for achieving this outcome with the level of overnight visitors, average spend per trip by visitors and hotel occupancy level being used to measure progress.
- 2.25 The Local Government Act (2014) introduced a statutory link between the community plan and a Council's Local Development Plan. The preparation of the LDP must take account of the community plan. It is intended that the LDP will be the spatial reflection of the community plan and that the two should work in tandem towards the same vision for a council area and its communities and set the long term social, economic and environmental objectives for an area.

(g) Newry, Mourne and Down Draft Tourism Strategy 2017-2021

- 2.26 The Council published its Draft Tourism Strategy for the District in December 2016. It is a 5 year strategy that sets out the strategic direction for the tourism industry within the District. The draft strategy aims to build upon the strengths and opportunities of the district and overcome the challenges by:
- developing EPIC (Experiential, Personalised, Iconic and Immersive and Creative) moments,
 - Building a unified and entrepreneurial industry that is customer focused,
 - Ensuring the development of tourism is undertaken sustainably and contributes to the enhancement of social, cultural and environmental values.
- 2.27 The vision of the draft strategy is: *By 2021 'NMD is a premier, year-round mountain and maritime destination in Ireland recognised for its EPIC experiences in outdoor adventure, its rich tapestry of cultural heritage, myths and unique stories, and its authentic local life'.*
- 2.28 The strategic framework of the draft strategy seeks to target the GB and overseas market segments that are identified as the best prospects for international tourism growth at NI level and within NMD ie. the 'Culturally Curious', 'Great Escapers' and 'Social Engineers' with the development of the area as a 'destination under the headline of 'Mountains, Myths and Maritime'.

2.29 The Destination Experiences are:

- The Mourne- Gullion Experience- catalyst projects include applying to UNESCO for Geopark designation for Mourne, Slieve Croob AONB and Gullion AONB; Newcastle uplift facility to higher Mournes; Lift assisted access for mountain biking and expanding training facilities and capacity; The Newry Canal 'Blueway' opportunity to open the canal to small boats and canoes between Pontzpass and Lough Neagh (21miles); and connecting with the Great Eastern Greenway to link Newry and Carlingford (approx. 13.8miles).
- The Mourne Coastal Experience- catalyst projects include improving access to water and a focus on coastal flavours.
- Gateway Communities- the strategy recognises the role of towns and villages in the creation of the destination. It identifies Downpatrick, Newcastle, Newry, Warrenpoint/ Rostrevor and Crossmaglen as gateway and hub communities. It aims to build upon the existing masterplans for these communities (which, with the exception of Crossmaglen, are outlined in section 3 below). The draft strategy notes Crossmaglen is a strategic gateway into NMD from South Armagh and has a stronger association with the 'Story of Ireland' and its myths and legends than many other established destinations in NMD or indeed Ireland. It aims to continue to build the local arts, culture and heritage along with outdoor recreation and water based activities.

3.0 Area Plans and Master Plans

3.1 The Ards and Down Area Plan 2015 and the Banbridge/Newry and Mourne Area Plan 2015 are the current statutory plans for the District and provide the framework against which to assess development proposals.

The Ards and Down Area Plan 2015 (ADAP)

3.2 The ADAP recognises the District has excellent growth potential which rests firmly on the beauty of the landscapes and variety of interests and heritage features to be enjoyed. One of the Plan's principal objectives was to encourage the development of the District's tourism potential however no specific plan policies with regards to tourism development were included. It refers to the signature projects of St Patrick/ Christian Heritage and The Mournes and identifies Strangford Lough as a growth opportunity. The principal attractions of the District were listed as follows:

- Strangford Lough/St. Patrick's country
- The Lecale Coast
- Slieve Croob and the Mourne Mountains

The Banbridge/Newry and Mourne Area Plan 2015 (BNMAP)

3.3 The BNMAPs overall Tourism Strategy includes the promotion of the development of sustainable tourism. This means facilitating tourist development in suitable locations without adversely impacting on environmental and man-made assets

which attract tourists. The Plan has not generally sought to designate local policy areas for tourism as proposals for tourism development will be considered in accordance with the prevailing regional policies. The plan offers no specific plan policies with regards to tourism development in the area. It does however note cross border trade and shopping as a growth opportunity. It also notes development opportunity sites were identified to accommodate tourist and leisure facilities in towns.

- 3.4 Newry City and the five main towns within the District also have their own Town Centre Masterplans which were completed by the former Department for Social Development (DSD) in conjunction with the local government and concerned with urban regeneration initiatives in each respective town centre.

Downpatrick Masterplan

- 3.5 The Downpatrick Masterplan was published in July 2010. The Masterplan focuses on achieving the agreed vision for the town by 2030, which is that *"Downpatrick will be rejuvenated as an energetic, vibrant and forward-thinking Town in which all its residents can take pride. Its unique historic environment, particularly its early Christian heritage, will be leveraged and complemented by exemplary development, establishing Downpatrick as a special visitor destination. The Town and surrounding area will also take advantage of its natural setting. Its buildings, streets and spaces will be attractive, safe and friendly, providing a focus for community life and an attraction to the increasing numbers who visit"*.
- 3.6 The Masterplan states that Downpatrick has an immensely rich heritage and is also blessed with substantial qualities in its natural environment. As such it considers the Town to have enormous potential to become one of the leading tourist destinations in the UK and Ireland. However, it noted that analysis found that visitors stay for very short periods of time and do not explore the historic Town beyond the Cathedral and Saint Patrick Centre. The limited hotel accommodation in Downpatrick was identified and it was deemed necessary to address this to encourage longer visits from tourists. The evening economy was also noted as being in need of improvement.
- 3.7 The Masterplan states that tourism development will be comprehensively supported through the development of the Town's heritage offer as well as wider environmental, transport and retail developments. It intends that tourism should be the primary driver of the rejuvenation of the Town Centre. It recognises that making the most of the Town's rich cultural and historic assets to grow a sustainable visitor economy will be a challenge and it sets out an ambitious plan to achieve this.
- 3.8 The main proposals in the Downpatrick masterplan included:
- A major new retail development in the Grove area to create a first class shopping environment in the heart of Downpatrick;
 - New people friendly streets to improve linkage throughout the town;
 - Continued support for public realm improvements and development opportunity sites;

- Redevelopment of the Gaol site for schools and a hotel;
- A Quoile River Country Park. This will introduce a network of walking and cycling links between key destinations such as St Patrick's Centre, the Mound of Down and Inch Abbey with wetlands, boardwalks, greenways and linear parks;
- An extension of Quoile wetland and open water;
- Protection and enhancement of the Downpatrick and County Down Railway (NI's only standard gauge heritage railway) with extended railway lines, and;
- A range of proposals to reduce traffic congestion to make the town centre more accessible.

3.9 The Masterplan also notes that Downpatrick is well situated within a wealth of tourism opportunities many of which are located within Newry, Mourne and Down district including the St Patrick's Trail, Strangford Lough and the Mourne Mountains. It recognises the potential to capitalise more fully on this location.

Ballynahinch Masterplan

3.10 The Ballynahinch Masterplan was published in October 2014. Like many towns and villages across Northern Ireland, Ballynahinch faces certain challenges such as difficult town centre trading, a lack of high quality public open space and town centre vehicular congestion. On the other hand, the strong sense of community, rich history, attractive main streets and wonderful surrounding landscape presents significant opportunities for this historic town.

3.11 The Masterplan was commissioned to help address these challenges and identify opportunities. It provides the format for taking a fresh look at the town in a holistic manner so that key aspects of its social, physical and economic character can be understood and appreciated.

3.12 Ballynahinch has a relatively limited tourism market. The pivotal focus of the town is the market square and market house which was built in 1795. A £2million Public Realm upgrade project completed in 2015 included the upgrade of the Square which plays a vital role within the Town.

3.13 Further development and expansion of the popular farmer's market provides an opportunity in tourism and food sectors and could attract more visitors and extend dwell time within the town with the promotion of the Town as a premier food destination. The evening economy within Ballynahinch is also somewhat limited.

3.14 The masterplan recognised the importance of conserving the built heritage and enhancing Ballynahinch's character. It identified the opportunity provided by the Drumlin landscape to provide public access and create a high quality parkland and a unique visitor attraction.

3.15 The main proposals included:

- Providing access to the Drumlins to create a high quality parkland and a unique visitor attraction,
- Refurbish historic buildings and monuments such as the Old Mill and ruins of the Old Windmill and co-ordinate themed events from them.

- Bypass to reduce congestion,
- Develop and promote an events programme promoting the history of the Town (Battle of Ballynahinch, The historic market and the old railway) to increase footfall and potential spend.
- Improved public realm and frontage improvements,
- New street and river park
- LOTS (living over the shop) to increase vibrancy and occupancy, and;
- Proposes exploring the merit of designating a Town Centre Conservation Area.

Newry City Masterplan

- 3.16 The Masterplan for Newry was published in October 2011 and is a key reference for regeneration and development decisions relating to Newry City Centre over a 10 – 15 year period. It sets out short, medium and long term actions that will enable the City to achieve its aims and objectives. Tourism is key to a number of these including: realising Newry’s potential as an international tourist destination as a hub to explore the wider area; capitalising upon its role as a gateway to the island of Ireland from the sea and to NI via its land border; keeping the city centre as vibrant as possible, and; sustaining its role as a retail destination.
- 3.17 It recognises that Newry’s location and surrounding rich landscape is ideally suited to tourism. It has excellent transport connectivity with Belfast and Dublin (and their three airports) with both being accessible by road and rail within almost an hour. Warrenpoint Harbour immediately to the south is also becoming an increasingly important freight terminal (following the publishing of the masterplan the port has also been docked at by three cruise ships). While it is set within a particularly attractive landscape with the Mourne, Gullion and Cooley Mountain ranges all within close proximity, along with the dramatic Carlingford Lough a few kilometres to the south. It also notes that the city performs relatively well in retail benefitting from its cross border catchment area.
- 3.18 However, it also noted the city faces a number of challenges such as the survival of independent retail alongside high street chains, the successful accommodation of vehicles whilst maintaining environmental quality and the means by which to prevent its older buildings falling into disrepair.
- 3.19 The Masterplan proposals for the city centre included:
- Creating a world class waterfront by capitalising on the Clanrye river and the Newry canal that runs through the city centre. This was to include the re-opening of the Newry Canal to boat traffic as part of a national connection between Lough Neagh and Carlingford Lough with a view to bringing an influx of visitors and building upon the success of the canals towpath which is recorded as one of Ireland’s most visited attractions;
 - Nurturing a unique, creative quarter for the arts and culture around the Town Hall, Basin Quay and the Arts Centre;
 - Regenerating Newry’s primary streets including Hill Street and Abbey Way with public realm upgrades and improving the connections from attractions such as Bagenal’s Castle and St Patrick’s Cathedral with the rest of the city centre;

- Revitalising key areas through health and education at Monaghan Street and Upper Edward Street;
- Establishing a new network of city parks to include commissioning archaeological works at Heather Park with a view towards a potential tourist attraction based on its location on Gallows Hill where public hangings traditionally took place;
- Integrating the Buttercrane and the Quays into the city centre as evidence suggests visitors fail to visit other parts of the city centre, and;
- Developing a new flagship city quarter comprised of high-quality mixed-use development in the Albert Basin.

3.20 Other city wide proposals included:

- Developing a policy to afford a degree of protection to the setting of Newry's City Centre from inappropriate development given the visual prominence of the valley slopes;
- Newry super greenway to link the majority of Newry's neighbourhoods with each-other and the city centre, and;
- A number of initiatives aimed at reducing congestion in the city e.g the Southern Relief Road to link Warrenpoint Road and A1 bypass, city centre gateway car parks and additional signage.

South East Coast Masterplan

3.21 The Masterplan for the South East Coast was published in January 2013. It provides guidance on the future strategic development of the South East Coast as well as specific guidance on the location and form of development in the Town Centres of Newcastle, Kilkeel and Warrenpoint over the next 20 years.

3.22 The South East Coast Masterplan vision is *"to become an area with a strong national and international reputation for being a high quality coastal landscape of great scenic, natural, historic and leisure value; and an area that provides an enjoyable place to live, to work, to explore, and to play in"*.

3.23 The delivery of this statement is to be achieved by enabling the key towns of Newcastle, Kilkeel and Warrenpoint to collectively and individually embrace and prosper from their association with both their coastal setting and the wider character of the Mourne Mountains as an Area of Outstanding Natural Beauty. It takes account of the Mourne Coastal Trail which is part of the Northern Ireland Tourist Board and former DETI's strategic approach to developing the Mournes as a signature destination and aims to develop a distinctive proposition for each of the centres to entice visitors.

3.24 The proposals included:

- In Newcastle, the plan proposes to build on the success of the new promenade by expanding the range of beachside activities available, showcasing local arts and crafts talents, introducing new play areas and establishing a programme of annual events; all of which will be designed to encourage overnight stays and extend the tourism season. It also notes the

development of the proposed 'Donard Gondola', as a premier tourist attraction will allow all visitors to explore and enjoy the Mourne Mountains.

- In Killeel, home to one of the largest fishing fleets on the island of Ireland, the plan proposes to promote the working harbour as an attraction for tourists to visit and experience the fish market for themselves. The redevelopment of the Nautilus Centre which incorporates a seafood cookery school, a maritime visitor attraction and tourist office will be complemented by the promotion and development of the profile of Killeel's seafood to international recognition. Creating a new improved state of the art play park and improved esplanade and access points to the beach will help to drive year round interest in the town.

The masterplan also references 'Sustainable Killeel 2020' that identifies new opportunities for fishing and engineering sectors. It states that developments in the fishing, renewable energy and aquaculture sectors should take account of Killeel as a centre for tourism and help the region develop as a centre for eco-tourism.

- In Warrenpoint, the plan seeks to promote and develop the town's reputation as a hub for watersports and activities, utilising its location on Carlingford Lough. Developing a marina would be a major attraction for the town as it would support boat trips and visiting cruise ships. While extending the promenade would link the Town Square and retail hub to the water's edge. The plan also seeks to revitalise the public spaces within the town centre, creating event space and making it more attractive, people friendly and less car dominated.

3.25 The town centre initiatives detailed in the Masterplan include shop front improvement schemes, retail performance programmes, development of vacant and derelict sites, introduction of town centre markets, restore projects, town centre revitalisation projects, urban development grants, vacant unit animation schemes, and a purple flag programme focusing on entertainment and hospitality.

3.26 The potential of the proposed Narrow Water Bridge to open up the entire South East corner for tourism was noted as significant while the potential for additional cross border tourism generated from plans for a new car ferry from Greencastle, Co. Down to Greenore, Co Louth was noted.

4.0 Departments, Agencies and Organisations with roles regarding tourism

(a) Department for Enterprise, Trade and Investment (DETI) now Department for the Economy (DfE).

- 4.1 The Department for the Economy is the key player in the formulation and delivery of economic development policy in terms of tourism in Northern Ireland as it hosts Tourism NI (trading name of the NI Tourist Board). In February 2010, it published 'A Draft Tourism Strategy for Northern Ireland to 2020'. The aim was to provide strategic direction and targets for the development of NI's tourism experience to the year 2020 and a targeted Action Plan to deliver it. At the core of the strategy was the intention to grow income from visitor numbers with tourist revenue increased from £536 million in 2010 to £1 billion by 2020.
- 4.2 The Draft and associated Action Plan set out priorities for action under three pillars of People, Product and Places, and Promotion along with a cross-cutting theme of Partnership through a multi-stakeholder approach to lead and partner each action.
- 4.3 The Draft Tourism Strategy for Northern Ireland to 2020 identified nine key tourism destinations, two of which are applicable to the District:
 - Mourne Mountains
 - Strangford Lough (St. Patricks Trail)

Each of these destinations also has a Management Plan. Both '*The Destination Mourne Mountains Management Plan 2013 – 2018*' and '*The Destination Strangford Lough Management Plan 2013 – 2018*' objectives are to maximise the potential to attract and encourage visitors to stay longer and spend more, by strengthening tourism performance and appeal across the whole of the plan areas.

- 4.4 The Draft Tourism Strategy for NI to 2020 was due to come into effect on 1st April 2011; however, it has not yet received clearance from the Executive due to the instigation of the Hunter Review- an independent review of the NI Tourist Board and wider tourism structures commissioned by DETI.
- 4.5 The Hunter Review was published in June 2014 which resulted in a rebranding of the NITB has since been rebranded to Tourism NI. The Review made a number of recommendations which fell into 3 themes:
 - i. Setting the strategic direction for tourism
 - ii. Building closer relationships within the tourism sector; and
 - iii. Closer alignment with Invest NI.
- 4.6 It was anticipated that Tourism NI will have a much greater presence at local level, developing strong relationships and increasing its knowledge of the needs of local tourism partners particularly in light of the recent changes in local government which has seen Councils assume increased powers and responsibilities for Community Planning and Local Development Plans, including local economic development. Collaborative working with the new Councils and the establishment of

strong partnerships are considered essential ingredients for Tourism NI in order to maximise the tourism potential of each of the 9 Key Tourism Destinations.

(b) Department for Agriculture and Rural Development (DARD) now Department of Agriculture, Environment and Rural Affairs (DAERA).

- 4.7 Other Government Departments also play an important role in Tourism Development. DAERA is the overarching body responsible for the Forestry Service of NI and the Loughs Agency, each of which hold a role in the promotion of tourism in Northern Ireland through their management of important natural assets.
- 4.8 Forestry Service encourages access to, and the use of, forests within Northern Ireland, while at the same time protecting and conserving them and associated areas of special natural and heritage interest. Such uses include the sustainable use of timber but also includes maintenance of open access to forests for both recreational and tourism purposes.
- 4.9 DAERA also manage the Rural Development Programme (RDP) 2014 – 2020. The latest Rural Development Programme for Northern Ireland will run from 2014 – 2020 and a budget of up to £623 million has been agreed with the Northern Ireland Executive for its implementation. The RDP evaluates the current economic and social situation within the rural areas of Northern Ireland and as a result the document identifies key areas for support. One such area that is deemed worthy of support is the promotion of economic growth in rural areas by supporting rural businesses and rural tourism. This should be enabled by the observation and support of the following priorities as indicated in the RDP:
- Encouraging farm diversification in rural areas as a way of stimulating further income generation. The incidence of diversification is considerably lower in NI (10%) than is the case for England where, using a similar definition, about 18% of farms were found to have some diversified activity in 2010 (Source: DARD 2007 EU Farm Survey).
 - Encouraging tourism in rural areas.
 - Increasing recreational access to woodland.
 - Help preserve the cultural and social uniqueness and beauty of rural villages.
 - Promoting social inclusion, poverty reduction and economic development in rural areas.

(c) Department of the Environment (DoE) now Department for Communities (DfC) and DAERA.

-NIEA

- 4.10 The Department of the Environment (DoE) was responsible for the Northern Ireland Environment Agency (NIEA) which has a role to play in regards to tourism given

their role in the protection of our monuments and built heritage which are important tourism assets. This responsibility has now transferred to DfC while others noted below have transferred to DAERA.

- 4.11 The District has more than 280 scheduled sites and monuments protected under planning policy for their historical value. In addition, there are 42 State Care Monuments that are maintained for both public amenity and conservation. Monuments and sites in both urban and rural environments are a tangible link to our past; they hold information on how our predecessors lived. For this reason, they are fascinating places that we need to protect and cherish for future generations.

In Newry, Mourne and Down, these sites include:

- Ballykeel Dolmen and Cairn
- Slieve Gullion Passage Tomb
- Jordan's Castle, Ardglass
- Ballynoe Stone Circle
- Dundrum Castle
- Inch Abbey
- Narrow Water Castle
- Struell Bath Houses and Wells
- Loughinisland Churches

-Northern Ireland Biodiversity Strategy (NIBS)

- 4.12 The DoE's Northern Ireland Biodiversity Strategy (NIBS) 2005–2009, set out the Executives commitment to conserve and enhance Biodiversity whilst striving to halt Biodiversity Loss by 2016. The NIBS 2002 set out three recommendations for the Tourism Sector in Northern Ireland in regards to setting and impact on Biodiversity assets. These were;

- Prepare and implement integrated rural development, tourism development and environmental conservation strategies, where wildlife interests and tourist potential coincide.
- Implement Integrated Sensitivity Zones and carrying capacity estimates into all strategic and area planning

- Ensure that the impacts of recreational activities are well understood and that these impacts are ameliorated through the development of codes of conduct for individual recreational activities or bylaws.

4.13 The DoE published a new Biodiversity Strategy for Northern Ireland in July 2015. The mission statement of the strategy is *'To make progress towards halting overall biodiversity loss, establish an ecosystem approach and help business and society in general have a greater understanding of the benefits that nature can bring to everyday life in Northern Ireland'*. A number of the associated actions are due for completion by 2016 therefore the intention is to review the strategy following this. The review will look at what has been achieved, what has been successful and changing circumstances. It will identify key challenges and any new initiatives or threats that have emerged. Newry and Mourne Council published a Biodiversity Plan in 2009 and Down District Council published a plan in 2012.

4.14 The District contains a plethora of environmental assets. Among these assets are the Mourne, Strangford and Lecale and Ring of Gullion Areas of Outstanding Natural Beauty, the sand dune landscape at Murlough Nature Reserve and the wetland habitats and species found on Carlingford Lough. With 62 Areas of Special Scientific Interest, this region contains some of Northern Ireland's most precious natural environment features, habitats and wildlife. There are many more valuable assets located throughout the district, including those that are not given special protection. Magnificent beaches, such as Murlough, sensitive coastal habitat, forests like Tollymore – these and the area's many other open spaces all require similar attention so that we sensitively manage and utilise these assets to their full potential.

- Outdoor Recreation NI

4.15 The NIEA also supported (through competitive Natural Environment Fund Grant Programme) Outdoor Recreation NI, an umbrella organisation for Walk NI, Mountain Bike NI, Canoe NI and NI Orienteering to deliver a number of activity tourism projects which adds to the quality of the regions reputation as an activity holiday destination.

(d) Department for Culture, Arts and Leisure (DCAL) now Department for Communities (DfC)

4.16 The former Department of Culture, Arts and Leisure (DCAL) was the Government Department responsible for arts and creativity, museums, architecture and built environment policy and through its role in these fields has a direct hand in influencing cultural tourism to Northern Ireland and also through its role in the organisation of festivals and events. Many of its responsibilities have now transferred to the Department for Communities. The District benefits from facilities such as The St. Patrick's Centre in Downpatrick and Bagenals Castle in Newry,

which each have a dedicated Visitor Centre providing information about opportunities to explore the heritage and culture of the region and wider afield.

(e) Department for Social Development (DSD) now Department for Communities (DfC)

- 4.17 The former Department for Social Development (DSD) now Department for Communities (DfC) has strategic responsibility for urban regeneration and community and voluntary sector development amongst other roles. The Regional Development Office, a Department within DfC, is responsible for developing, promoting and implementing programmes to help regenerate towns and villages outside Belfast and the North West. Its responsibilities include town centre reinvigation including comprehensive development schemes and environmental improvement schemes.

(f) Department for Employment and Learning (DEL) now Department for the Economy (DfE)

- 4.18 The Department for the Economy is responsible for the promotion of learning and skills in Northern Ireland and for policy in Further to Higher Education, Training and Employment Rights. The Department has a direct role in the provision of employees and employment opportunity in terms of appropriate skills and training, which in turn directly influences all aspects of the economy, including the Tourism Sector.
- 4.19 In recognition of the growth in the tourist sector, DEL established a "Future Skills Action Group" which brought together key stakeholders from the industry, to identify current and future skill trends and growth requirements for the industry. In April 2010, the "Hospitality and Tourism future Skills Action Group Review" was released. This document sets out an action plan to increase skills and training relating to tourism employment within Northern Ireland.

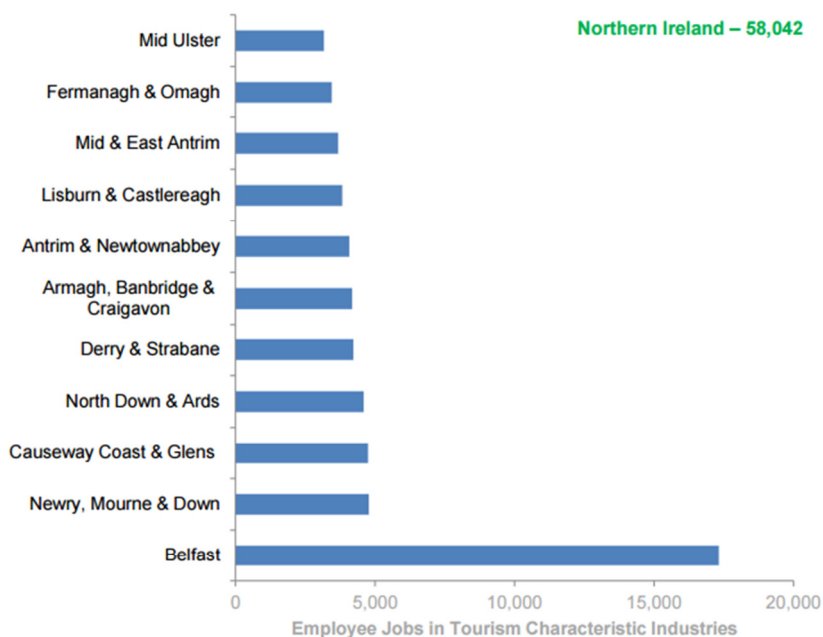
(g) National Trust

- 4.20 The National Trust is a conservation organisation with charitable status that works to preserve and protect historic places and spaces in the public interest. The Trust owns a number of heritage properties including historic houses, gardens and estates. It is one of the largest landowners in the UK, owning many beauty spots, many of which are open to the public free of charge. The Trust owns a number of properties in the District- Rowallane Gardens, Castle Ward, Strangford Lough, Murlough National Nature Reserve, The Mourne, and Derrymore House. (Additional information on these properties is included in Appendix 1).

5.0 Northern Ireland and Newry, Mourne and Down Tourism Industry

- 5.1 With a population of around 171,500 and a coastline of approximately 100 miles, the District is the third largest Council area in Northern Ireland. Although primarily made up of the former Newry & Mourne and Down District Council areas, the new Council also includes the electoral ward of Ballyward which has transferred from the former Banbridge District Council area.
- 5.2 The District is an area rich with tourism assets, natural beauty and cultural heritage. The juxtaposition of the Mourne Mountains and the sea is unique. The area also contains many of the provinces main tourist attractions; including the Mourne Mountains, Ring of Gullion, Slieve Croob, Kilbroney Park and Strangford Lough/St. Patrick's country.
- 5.3 The District has a great variety of places to visit including forest parks, historic houses and gardens, historic monuments and visitor centres. These offer opportunities for touring and diverse individual and recreational activities. As a result tourism within the area is based on both the natural and built heritage, which ranges from countryside, forest and coastline to conservation areas, historic buildings and ancient sites.
- 5.4 Tourism is an integral part of the local economy with the sector generating £54m in 2014 and £47.7m in 2015. In 2013 there was an estimated 4,780 tourism related jobs across the District accounting for 9.3% of total employee jobs within the District. Figure 1 below shows how this compared to the other Local Government Districts (LGDs) with the District being second only to Belfast in terms of the number of jobs in Tourism Characteristic Industries.

Figure 1: Employee Jobs in Tourism Characteristic Industries in LGD's 2013



Source: NISRA

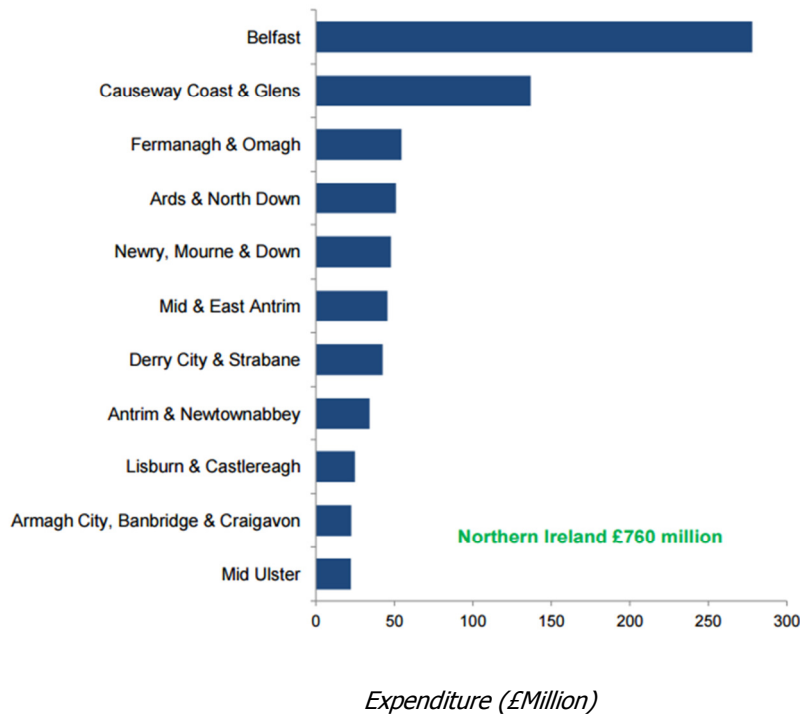
- 5.5 Figures released by the Northern Ireland Statistics & Research Agency (NISRA), coupled with Tourism NI research, show that 2015 was positive for the tourism sector. In 2015 there were 4.5 million overnight trips in Northern Ireland. This figure includes trips to Northern Ireland by external visitors and domestic trips taken by local residents. The number of overnight trips shows no change on 2014. Expenditure associated with these trips was £760million, up 1% on 2014. In 2015 overnight trips to Northern Ireland by external visitors stood at 2.3 million. This is the highest number on record and a 5% increase on 2014.
- 5.6 More than 400,000 visitors from overseas came to Northern Ireland during the first quarter of 2016, according to Tourism Ireland. The figures were compiled by NISRA and represent an 8% growth on figures from the same period last year. As well as the increase in overseas visitors, there has been a marked increase of 10% in revenues, which meant that £93m was brought into the local economy.
- 5.7 The strength of the tourism market in the District can be measured in terms of the number of trips, nights and spend. Figure 2 (below) shows the number of overnight trips, nights and expenditure in the District for 2012-2015. It shows that expenditure from overnight trips accounted for £47.7m in the District in 2015. Figure 3 (overleaf) shows how this compared to the 11 Local Government Districts (LDGs) with the District being ranked fifth. It also accounted for 6% of the overall spend in Northern Ireland. However, the average spend per overnight trip in the District was £118.03 compared to the Northern Ireland average of £168.60. As a result the District ranked last of the 11 Local Government Districts in terms of overnight expenditure per trip (NISRA, 2015). This suggests that the District attracts lower spending markets. Figure 4 (overleaf) shows that the District performed well in terms of the number of overnight trips with it being ranked third of all LGDs. However, despite having a high number of trips the average length of the trips at 2.6 nights is lower than NI average of 3.25 nights.

Figure 2: Estimated no. of Overnight Trips/ Nights & Expenditure in Newry, Mourne and Down and Northern Ireland 2012-2015

	2012		2013		2014		2015	
	NI	NMD	NI	NMD	NI	NMD	NI	NMD
Trips	4,024,505	454,092	4,069,440	453,109	4,513,136	571,000	4,531,618	404, 442
Nights	13,857,763	1,424,090	14,393,835	1,464,543	15,082,371	1,488,281	15,470,769	1,056,896
Spend	£686.3m	£64.8m	£715.2m	£49.8m	£744.9m	£54m	£764.1m	£47.7m

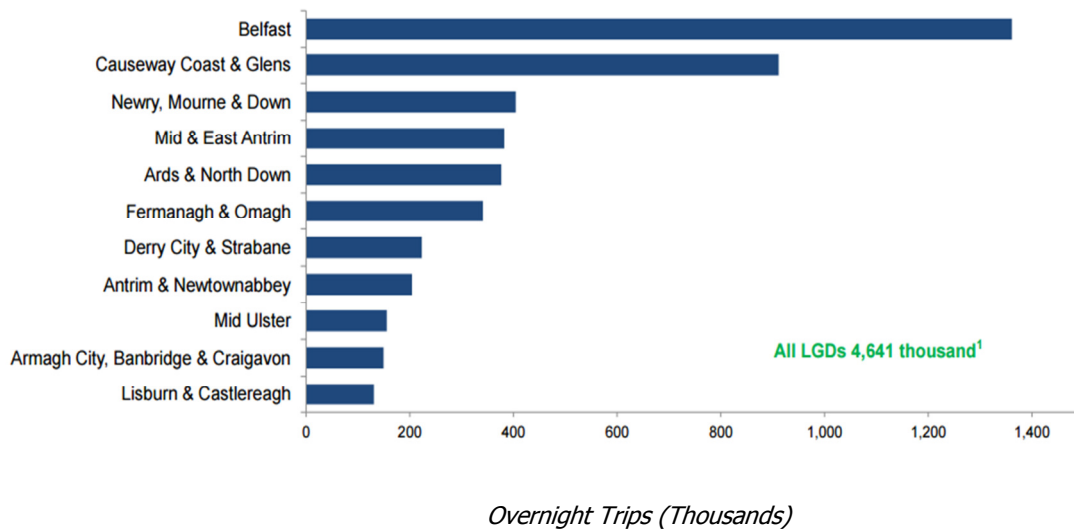
Source: Northern Ireland Passenger Survey

Figure 3: Expenditure (£) on Overnight Trips by Local Government District, 2015



Source: Local Government District Tourism Statistics 2015, NISRA

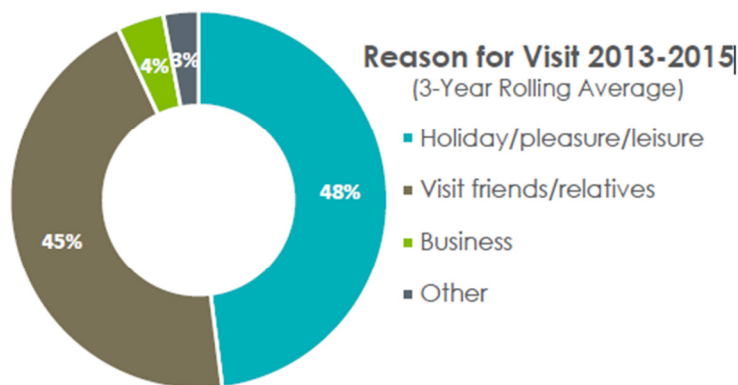
Figure 4: Overnight Trips by Local Government District (thousands), 2015



Source: NISRA, Northern Ireland Passenger Survey 2015

5.8 Figure 5 below shows the breakdown of the trips taken in the district and the reason for them. It shows that the top reason for an overnight stay in the District was for holiday/pleasure/leisure purposes with 48% of people visiting the District between 2013 and 2015 staying for this reason. This was above the Northern Ireland average of 44%. The second biggest reason for visiting was visiting friends or relatives at 45% again above the Northern Ireland average of 41%. The figure also shows that the District had a lower than the NI average number of people visiting for business purposes with only 4% of overnight trips being for this purpose compared to the NI average of 9%.

Figure 5: Reasons for visiting in Newry, Mourne and Down, 2013-2015



Source: NITB

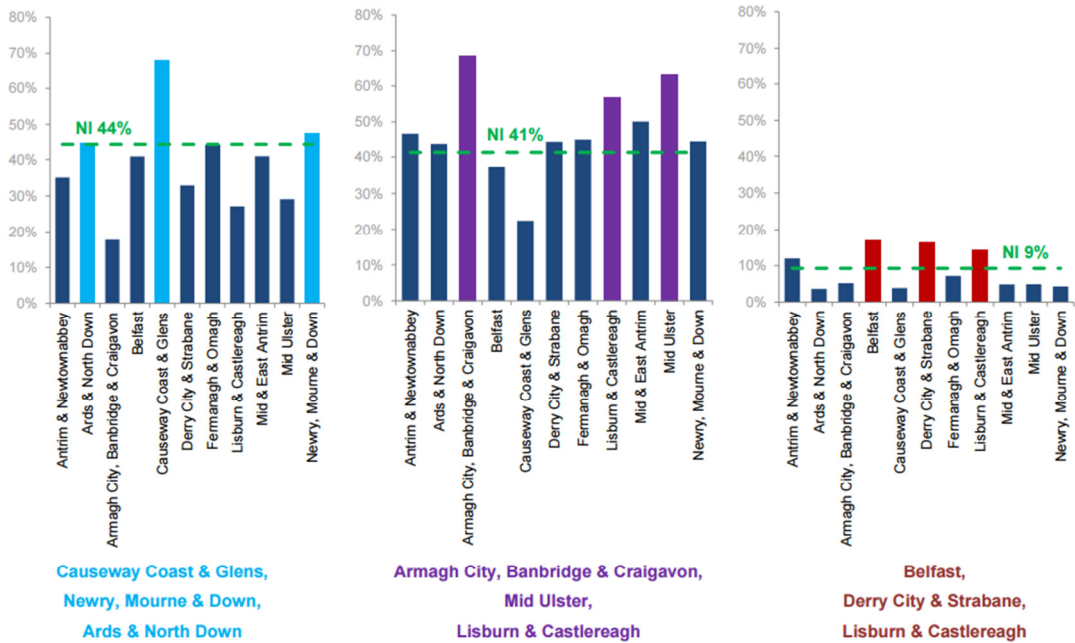
5.9 The graphs overleaf (Figure 6) show the breakdown of the trips taken and the reasons for them for the 11 LGDs. It shows that the region is clearly a popular destination with people visiting for holiday/ pleasure/ leisure purposes with the district being ranked 2nd only to Belfast in this category. It also shows the district is ranked 7th and 9th respectively for the number of trips taken for visiting friends/relatives and business purposes.

Figure 6: Reason for Overnight Trips in Northern Ireland within Local Government District (3 year rolling average)

Holiday/Pleasure/Leisure

Visiting Friends/Relatives

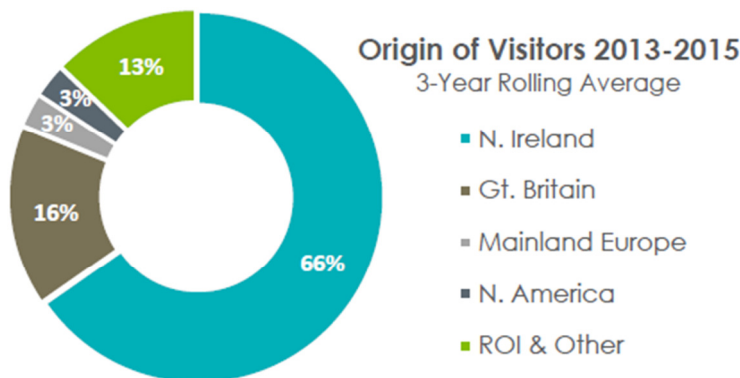
Business



Source: Local Government District Tourism Statistics 2015, NISRA

5.10 As shown in Figure 7 below tourists from within NI account for the majority of the tourism market in the District with 66% of visitors during the period 2012-2015 coming from NI. It also shows 16% coming from GB, 13% from ROI and the remaining 6% share being from mainland Europe and North America combined.

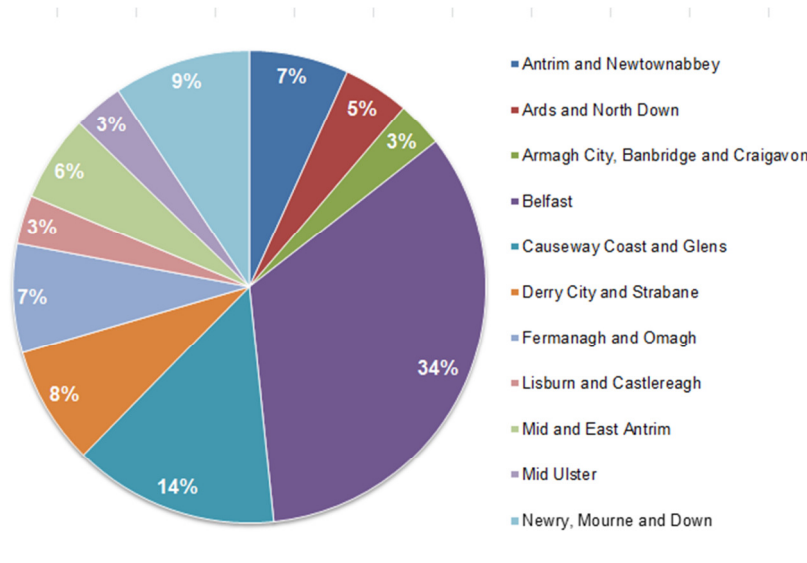
Figure 7: Origins of visitors to Newry, Mourne and Down, 2013-2015



Source: NITB

5.11 The availability of commercial accommodation is an indicator of the supply side of tourism. Figure 8 below shows that Belfast accounted for the highest share of accommodation rooms with 34% of the rooms stock in Northern Ireland. Causeway Coast and Glens accounted for the second highest room stock (14%) with Newry, Mourne and Down third (9%).

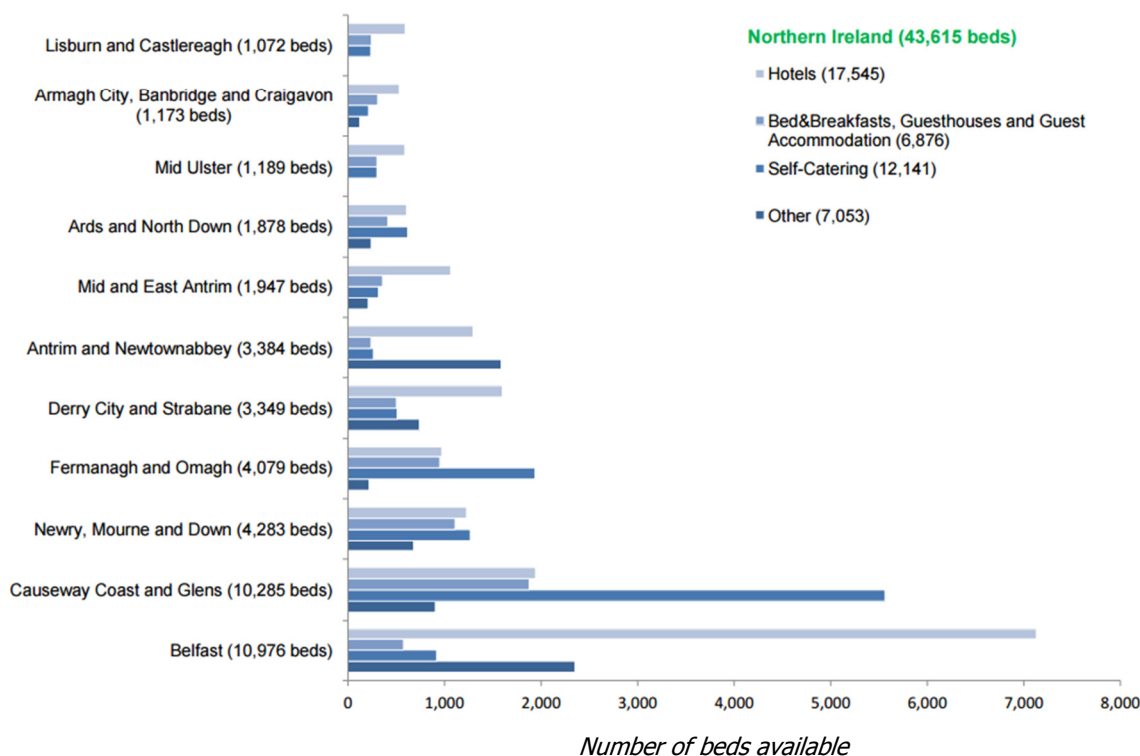
Figure 8: Room Stock within Local Government Districts, 2015



Source: Local Government District Tourism Statistics 2015, NIRSA

5.12 Figure 9 (overleaf) shows the number of beds available in licensed accommodation by type for the LDGs. It shows that the District has the second highest number of beds available in Bed and Breakfasts, Guesthouses and Guest Accommodation of all Government Districts. Using the figures in the graph below shows that the District accounts for 9.8% of the total number of beds available in licensed accommodation in NI in 2015.

Figure 9: Number of Beds available in Licensed Accommodation by Accommodation Type and Local Government District, 2015



Source: Local Government District Tourism Statistics 2015, NIRSA

- 5.13 Accommodation occupancy rates are an indicator of the demand for accommodation in the District. The average annual hotel room occupancy rate for the District in 2015 was 55% and in 2014 it was 52% (NISRA). During 2015, the demand for hotel bedrooms in the district was broadly on a par with the Northern Ireland average in the summer season (May to September). However, outside of these months, the demand for bedrooms in the District lags some way behind the benchmark results. There was a significant decline in bedroom demand in the District, such that the average annual occupancy rate was 55% as against 67.3% across Northern Ireland.
- 5.14 Figure 10 (overleaf) shows the breakdown of accommodation stock in the District by type up to the end of 2015.

Figure 10: Accommodation Stock by type in the District- Year End 2015

NEWRY, MOURNE AND DOWN DISTRICT COUNCIL	TOTAL	UNITS	ROOMS	BED-SPACES
HOTELS				
5 STAR/4 STAR	3		358	827
3 STAR	2		37	87
2 STAR	1		18	49
1 STAR	1		16	33
UNCLASSIFIED	5		100	231
TOTAL	12		529	1,227
GUESTHOUSES				
GUESTHOUSES	16		147	349
BED & BREAKFASTS	81		246	534
SELF-CATERING	173	254	625	1,267
HOSTELS	10		177	645
GUEST ACCOMMODATION	17		92	227
BUNKHOUSE	2		7	34
TOTAL	311		1,823	4,283

Source: NITB

5.15 The Council commissioned an Accommodation Needs Analysis Study (September 2015) in which consultations were carried out across the District with current accommodation service providers, attractions, Council senior management, DETI, Tourism NI, Tourism Ireland and selected Tour operators, along with an assessment of current visitor trends. The following accommodation recommendations were made based on the findings on this report:

- More licensed guest inns required
- Mid-market hotel – Downpatrick with Spa
- Killeavy Castle, Hotel and wellness Centre – Ring of Gullion
- Multi-choice accommodation options (i.e. in forest parks)
- Budget hotel in Newcastle or upmarket hostel
- Possible budget hotel in Newry

5.16 The accommodation needs analysis and the recommendations are important to identify where gaps exist in terms of accommodation provision and to assist, where possible, in order to provide the right conditions for people to set up businesses in terms of planning, locations, job creation, rates, and incentives to encourage people to invest in the area.

6.0 Newry, Mourne and Down Tourism Assets

6.1 The potential to attract tourism and to sustain interest and investment has been historically based on a mixture of both private and public interests and investments. Natural and built heritage resources are often deemed to be the key players in the ability to generate and attract tourism and revenue; however the ability to attract visitors through cultural tourism such as the hosting of events and activities also plays an important role. This section of the paper will provide an overview of the districts tourism assets and growth areas.

-Activity Tourism

6.2 Activity Tourism was identified by the NI Tourism Strategy as a key target market. It is estimated to be worth £90-100million per annum in revenue for NI tourist businesses (Source: Activities Tourism-Sharing Success, NITB 2011). It covers a range from active holidays involving canoeing, climbing, horse riding and mountaineering, to the less physical, yet still activity-focused areas of nature walking, food trails, or local culture and heritage trails. DETI and Tourism NI identify Activity and Special interest breaks as a key target market worthy of support in NI. Activities include golf, angling, walking and cycling amongst others. A number of these activities will be further investigated below. First it is important to note that the country parks, parks and forests in the district have an important role to play in the provision of activities and as an attraction for visitors. NISRA (2015) showed that country parks, parks and forests accounted for 43% of all visitors in NI 2015. Delamont Country Park which features an adventure playground, walking trails, boat trips, a shop, bbq area and visitor centre had 212,000 visits in the same period meaning it was one of the top 10 visitor attractions in this category in NI. (Additional information on this and other parks and forests in the district is included in appendix 1).

-Golf

6.3 The Tourism Strategy for Northern Ireland 2020 highlights the opportunity for growing golf tourism nationally and internationally to position NI as a premier golf destination. There are currently eleven Golf Courses in the District; Ardglass, Downpatrick, Kilkeel, Warrenpoint, Royal County Down, Cloverhill, Mayobridge, Bright Castle, Crossgar, Spa and Ashfield.

6.4 Tourism NI developed a golf tourism strategic plan in March 2015 focusing on the success of golfing in Northern Ireland which aims to maximise the potential of Golf Tourism in NI by 2020. Golf tourism currently generates £33m a year for the economy, but the Tourism NI Golf Strategy aims to boost that figure by at least £17m.

6.5 The Dubai Duty Free (DDF) Irish Open, hosted by the Rory Foundation, returned to Royal County Down, Newcastle in May 2015 for the first time in 76 years. This is a prime example that demonstrated that Newry, Mourne and Down Council, in partnership with others, have the capacity to host major events within the District.

6.6 The Irish Open in Newcastle had an audience of over 100,000 and was seen by an estimated 400 million people around the world. It generated over £11 million into the local economy, particularly into the hospitality sector. By providing a visitor experience, which included accommodation, food and drink, culture, a quality natural environment and local hospitality, the District experienced increased visitor numbers as a result of hosting this professional golfing tournament.

-Angling

6.7 Angling represents a key product to deliver growth and competitiveness for tourism in Northern Ireland and the District. Angling is the 6th biggest sport in the UK according to the "A Strategic Review of Angling in Northern Ireland, 2013" commissioned by DCAL. Although angling does not have the visibility of many other activities, such as walking and cycling, based on the number of licences issued, the number of visiting anglers from outside NI appears to be slowly increasing. Evidence shows that the visiting angler is as valuable to the NI economy as a visiting golfer, walker, cyclist or horse-rider and all these groups spend more than the average 'non sporting' visitor.

6.8 The District has some of the country's best waters for angling which places it in a prime position to avail of the tourism opportunities that angling can bring. The main beneficiaries of increased angling tourism in the District would be service providers including pubs; restaurants; hotels; holiday lets; and B&Bs. With some notable exceptions there is a lack of awareness among these providers of the potential opportunities to service visiting anglers which would attract new summer business and also extend their season.

6.9 Fishing communities in Kilkeel and Ardglass received a major boost in October 2015 through a Maritime Heritage Tourism initiative with the project providing benefits such as Heritage guide training, signage, seating, information panels, free Wi-Fi and media Apps. The aim of the project was to attract and retain visitors who will bring revenue into the ports and their wider communities.

-Hiking and Walking

6.10 The district offers numerous locations and opportunities for hiking and walking while enjoying the distinctive landscape. The most well-known location within the district is likely to be the Mourne which contains 12 peaks and includes Slieve Donard, NI's highest mountain. The area is partly owned by the National Trust and sees a large number of visitors every year for hiking, cycling and rock climbing. Walk NI identifies the Mourne Mountains as one of six top walking destinations in NI. (Strangford Lough is also identified making the District particularly popular for this activity).

6.11 The Mourne tourism profile is made up mostly of day visitors and visitors from within NI with 61 % of visitors being families while 21% are couples and 30% of all those visiting participates in hiking/ walking.

- 6.12 The Destination Mourne Mountains Tourism Management Plan 2013-2018 aims to achieve the vision of the Mournes as 'The Outdoor Playground for the North of Ireland'.
- 6.13 Tollymore Forest Park is an example of how parks are important in the provision of activities. There are four official walking trails within the forest. All trails start and end in the car park. They offer a range of distances and difficulties from the Arboretum Path which is half a mile long to the Mountain and Drinns Trail which can be combined to a total of 8.5miles. The Ulster Way also passes through the forest.
- 6.14 An example of a tourism project in the District is Bunkers Hill, Castlewellan. Bunkers Hill is a small, recently felled forest at the edge of Castlewellan Town. In November 2014 a new 2km multi-use trails and play trail was officially opened at Bunkers Hill Forest. The project was developed by Outdoor Recreation NI on behalf of Down District Council. The new trail is designed for use by the local community and visitors from further afield, and takes in the most glorious views of Dundrum Bay, Slieve Croob and the Mourne Mountains.

- Mountain biking

- 6.15 Mountain biking and cycling generally is experiencing a surge in popularity. There are now approximately 100km of official purpose built mountain bike trails across Northern Ireland with an estimated visitor usage of some 100,000 people a year. (Source: "Mountain Biking Guide" as produced by NITB in January 2013).
- 6.16 Two of Northern Ireland's three National Mountain Bike Trails are located in the District; Rostrevor Mountain Trails which offer a 27km red trail and 19km black loop, both packed full of technical trail features and panoramic views of mountains and coast; and the Castlewellan Mountain Trails which offer 9km red trail and a 4km green trail, 4.5km blue and purpose-built pump track making it the ideal destination for all ages and mountain biking abilities. There is also a Regional Trail located in Castle Ward as well as a local facility based in Tollymore.

-Watersports

- 6.17 With over 100 miles of coastline the District is home to Strangford Lough, Carlingford Lough and a number of beaches that offer water-based activity opportunities. Strangford Lough is the largest sea lough in the British Isles, covering an area from Angus Rock to the sand flats at its northern end, some 20miles (33km) away. It is one of only three Marine Nature Reserves in the UK and is a popular tourist destination offering activities such as leisure sailing, kayaking, fishing, bird watching and diving. It is one of nine canoe trails in NI (Source: Canoe NI) and covers 80 nautical miles taking in the beautiful surroundings, heritage and wildlife. The District also benefits from the South East Coast Canoe Trail.

- 6.18 Beaches are popular tourist attractions as they offer family friendly activity. Beaches in the District include Murlough, Cranfield, Tyrella, Warrenpoint and Newcastle. (Additional information on these beaches is included in Appendix 3). Murlough is the most visited beach in the District with 241,000 visitors in 2014 making it one of the top 10 tourist destinations in NI (excluding country parks, parks and forests, NISRA 2014). The blue flag beach is 5 miles in length and is a key attraction that is popular for swimming, sunbathing and other forms of recreation. The beach is backed by ancient sand dunes that are designated as a National Nature Reserve.
- 6.19 There are a number of other water-based activities that are available at the other beaches for example kayaking, banana boating, jet skiing, pier jumping and canoeing.
- 6.20 The inland rivers and lakes also provide opportunities for water based activities such as wet bouldering, open canoeing, kayaking and canyoning.
- 6.21 Access to Strangford Lough, Carlingford Lough and a number of beaches in the District is limited and as a result prevents the potential for activities such as boating and yachting from being fully realised.

-Activity Centres

- 6.22 There are numerous facilities within the District offering a wide selection of activities in the Mourne and Ring of Gullion area. These range from climbing, coastering and bouldering, high ropes and zip lines to mountain biking, 4 x 4 off road driving, zorbing, paintballing orienteering and archery. These facilities offer activities to youth/ sports groups, hen/ stag groups and corporate team building. (A list of popular facilities can be found in Appendix 4).
- 6.23 The District has plenty on offer to suit children and families. With many activities throughout the District, suitable for all age groups, such as canoeing, climbing or kayaking there are also centres that cater for children and families. (Additional information on some of the facilities available is in Appendix 5).

-Cultural tourism

- 6.24 Cultural tourism has been described by the Organisation for Economic Co-operation and Development as 'one of the largest and fastest growing global tourism market... [it is] increasingly being used to promote destinations and enhance their competitiveness and attractiveness'. Cultural tourism is said to include movements of people 'to specific cultural attractions such as heritage sites, artistic and cultural manifestations, arts and drama outside their normal place of residence (Richards, 1996). Some examples of the districts cultural tourism assets are noted below.

-built heritage

- 6.25 Built heritage refers to Listed Buildings, Monuments, Parklands, Gardens, Demesnes, Conservation Areas and Local Landscape Policy Areas. The district has an abundance of built heritage assets which are a strong attraction for outside visitors to come to the area. There are a total of 2016 archaeological sites and monuments, 643 listed buildings, 35 historic parks, gardens and demesne, 924 industrial heritage sites, 33 Areas of Significant Archaeological Interest/ Areas of Archaeological Potential, 10 Conservation Areas, 27 Areas of Townscape Character and 216 LLPAs in the district.
- 6.26 Examples include the National Trust estate of Castle Ward House and Demesne which is located on the Shore of Strangford Lough. It includes an eccentric 18th Century mansion and estate with 820 acres of landscaped gardens, a fortified tower, Victorian laundry, theatre, restaurant, shop, saw mill and a working corn mill. The estate was the No. 1 destination in the District in 2015 (NISRA, 2015) which demonstrates the importance and draw of built heritage assets in generating visits.

-natural heritage

- 6.27 The District enjoys a wealth of natural assets, many of which have special designations afforded to them to protect their distinctiveness and quality. As previously noted the Mourne Mountains and the Strangford Lough (St Patrick Trail) were identified as two of the nine key destinations within the Draft Tourism Strategy for NI to 2020. The Mourne Mountains, Strangford Lough and the Ring of Gullion were also identified as Strategic Natural Resources in the RDS 2035.
- 6.28 In addition to these there are a number of sites that are significant in terms of their natural heritage value and as a result have various designations in order to protect their distinctive character. These designations are noted in more detail in the Environmental Assets preparatory Environmental Assets paper. In brief they include 3 Special Protection Areas (SPAs), 11 Special Areas of Conservation (SACs), 4 Ramsar Sites, 62 Areas of Special Scientific Interest (ASSIs), 2 National Nature Reserves, 5 Nature Reserves, 1 Marine Conservation Zones (MCZs) (Strangford Lough), 1 proposed MCZ (Carlingford Lough) and 3 Areas of Outstanding Natural Beauty (AONBs).
- 6.29 The ability of natural heritage to attract visitors is evident in the number of visits to some of the Districts assets. For example Murlough National Reserve which is a fragile 6000 year old sand dune system at the edge of Dundrum Bay and the Mourne Mountains was the No. 1 attraction in the District in 2014 (NISRA). It consists of a network of paths and boardwalks through the dunes, woodland and heath. It is an excellent area for walking and bird watching due to its spectacular location.

-Christian Heritage

- 6.30 The District enjoys an unrivalled link to St Patrick and Christian heritage which offer significant tourism potential. The St Patricks Trail is a 92 mile signed tourist driving trail that connects the key sites with strong links to St Patrick's life, landscape and legacy. It is an excellent way of telling the story of St Patrick's journey and is identified as one of five signature destinations identified by Tourism NI as offering the best opportunities for tourism growth and to create world class excellence for Northern Ireland. The attractions along the Saint Patrick's Trail for the District area include;
- 6.31 St. Patrick's Centre is a permanent interpretative exhibition centre featuring interactive displays on the life and story of Saint Patrick, the patron saint of Ireland. It provides the only permanent exhibition centre in the world devoted to Saint Patrick. In the exhibition, entitled *Ego Patricius*, Saint Patrick's own words are used to illuminate the arrival of Christianity in Ireland and its development through his mission. It also reveals the artwork and metalwork which were features of the Early Christian period, as well as the major impact of Irish missionaries in this period in Europe. The St Patrick centre acts as a hub for tourism in the area, and a focal point for a wide range of educational, religious and cultural interest.
- 6.32 Down Cathedral is a Church of Ireland cathedral located beside the St Patrick Centre. It stands on the site of a Benedictine Monastery, built in 1183. St Patrick's remains are buried in the graveyard. The Cathedral hosts major festivals and services for the Diocese, the highlight being the annual St Patrick's Day celebrations on 17th March.
- 6.33 Down County Museum is located in the restored eighteenth century County Gaol of Down. The museum collects, conserves and interprets those objects which best illustrate the history, culture and environment of County Down. Every year the museum also organises, a range of special exhibitions on a variety of topics. The museum also has an extensive education programme with activities for school and community groups.
- 6.34 Inch Abbey and Quoile Pondage. Inch Abbey is a large, ruined monastic site situated on the edge of the Quoile River with the buildings mainly dating back to the 12th and 13th centuries. Quoile Pondage, where the river joins Strangford Lough, is a freshwater nature reserve with a visitor centre next to the ruined Quoile Castle.
- 6.35 Struell Wells is a remarkable complex of holy wells, set in a secluded rocky valley along the line of a flowing stream. Though known as St Patrick's Wells, the association is traditional rather than historical, arising from their nearness to Saul, 1.5 miles away. The waters were believed to have curative powers and the site has a ruined church, 2 bath-houses (one for men, one for women) and two roofed wells, all fed by the stream.

- 6.36 Saul Church is a restoration building on the site to commemorate the 1500th anniversary of the landing of St Patrick and was opened on All Saint's Day 1933. Throughout the year visitors and pilgrims, intrigued by the history and beauty of this locality are welcomed. The high point each year is the celebration of St Patrick's Day on 17th March when the Church welcome visitors of all Christian backgrounds to worship.
- 6.37 Bagenal's Castle is a sixteenth century fortified house and adjoining nineteenth century warehouse located in Newry. The legacy of Patrick's work can be found in Bagenal's Castle. It was at this site, in 1157, that the Cistercian abbey was founded. Little remains of the abbey today, but excavations have revealed human remains, pottery and a 12th century slab of granite bearing a Celtic cross. In 2015 Bagenal's Castle were awarded a Silver Award in the Green Tourism Business Scheme.

-Festivals and Events

- 6.38 Festivals and events are very useful tools to help drive tourism, extend the tourism season and enhance the District's profile; they are also good at facilitating networking and links with global brands. The showcasing of events, such as home-grown festivals, to major international events such as the Irish Open 2015 is a major driving force at attracting visitor numbers to an area. In terms of the impact of the economy, there is a direct correlation between the ability to attract visitor numbers to the generation of increased spend. In terms of lasting legacies and social impact, such forms of tourism also provide platforms for the visitor to interact with the local culture, local people and explore our scenic landscapes and settlements.
- 6.39 The district delivered an extensive programme of events last year (2016) with highlights including the staging of the Skiffie World Rowing championships on Strangford Lough, the annual Festival of Flight in Newcastle and a new 'Wake the Giant' event in Warrenpoint based on a myth of a sleeping giant reposing on the Cooley Mountains.
- 6.40 The season of 'Giant Adventures' also played host to a number of other music and cultural gatherings across the district including the Mourne International Walking Festival, Fiddlers Green International Music Festival, Blues on the Bay, Soma Arts and Cultural Festival, Lur Cinn Fleadh, Rostrevor Choral Festival, Ballynahinch Game and Harvest Festival, Hans Sloane Chocolate Festival and Hallowtides. (Additional information on some of the festivals and events held is included in Appendix 6).

-Food Tourism

- 6.41 Food is a vital part of the tourism experience for visitors coming to Northern Ireland. In 2008, the Northern Ireland Passenger Survey indicated that more was spent on food and drink than on any other category, including accommodation with 33% of the £540 million spent by overseas and domestic tourists being spent on food and drink. Actions have already been taken to boost food tourism with the launching of the Mourne Food Cycle Trail, the Strangford Lough and Lecale Partnership' Seafood Report and the work of the Mourne Seafood Cookery School.
- 6.42 Tourism NI has sought to benefit from the growth of this category by designating 2016 as the NI Year of Food and Drink. As part of this campaign the District showcased its fantastic range of local food and drink through its own 'Taste Junction' Initiative.

-Screen

- 6.43 According to statistics published by DCAL in 'Experience of the arts by adults in Northern Ireland 2013/14', the most popularly attended art form in NI was to a film at a cinema or other venue (58% of respondents).
- 6.44 There are two multi-screen cinemas in the District, namely at Downpatrick and Newry. There is also a voluntary run non-profit led cinema based in Newcastle that screens lesser known films and older movies.
- 6.45 The District has also provided a number of filming locations for the Game of Thrones (one of the most popular and successful fantasy TV series ever made) including Leitrim Lodge, Tollymore Forest, Inch Abbey, Quoile River, Castle Ward and Audrey's Field. Guided and self-guided tours now operate and act as a draw to these and to other filming sites throughout NI.

-Theatre

- 6.46 Theatre is Northern Ireland's most popular art form, accounting for 60% of all ticket sales from 6,661 art form performances in NI in 2010-2011. The Arts Council of NI annual contribution to the entire arts sector is approximately £13 million a year. Theatre, as one part of that sector, annually accounts for ticket sales revenue in excess of £10 million.
- 6.47 The District has several hubs for theatre activity which include;
- The Down Arts Centre and Down County Museum;
 - Sean Hollywood Arts Centre;
 - Newry Town Hall;
 - Warrenpoint Town Hall; and
 - Newry & Mourne Museum.

6.48 These venues are host to various arts, drama, music, theatre and dance programmes and performances as well as being a centre for arts and craft workshops. Unlike other sectors of the Creative Industries, Professional Theatre and Performing Arts, make a further economic contribution to night-time economies.

-Literature

6.49 Literature was identified as one of seven sectors of significance by Tourism NI. C.S Lewis is possibly the most well know author to have connections to the District. He is believed to have found the inspiration for his Narnia depicted in 'The Lion, the Witch and the Wardrobe' from the Mourne Mountains. He is also reported to have said 'that part of Rostrevor which overlooks Carlingford Lough is my idea of Narnia' (source: Discover NI). This connection is built upon with the Narnia Trail through Kilbroney Forest Park in Rostrevor where the story of Narnia is brought to life in a short family loop trail. The trail is entered like the magical world itself, through a Wardrobe, and leads to several interpretative stations with themes including The Tree People, The Beavers' House, the Citadels and many more.

-Pubs and Nightclubs

6.50 The night time economy of the Districts larger towns are largely fuelled by the popularity of pubs and nightclubs in the region. The Purple Flag project was initiated in Northern Ireland by Pubs of Ulster and the Association of Town Centre Management with funding support through NITB's Tourism Innovation Fund. Purple Flag is a new accreditation scheme that recognises excellence in the management of town and city centres at night. Purple flag status is similar to Blue Flag for beaches. Purple flag towns and cities must be welcoming to everyone, offer safe ways for visitors to travel home, provide a good mix of venues and be appealing in the evenings.

6.51 Newry was granted Purple Flag status in December 2013 and joined the four other Northern Ireland towns and cities of Belfast, Enniskillen, Bangor and Derry-Londonderry. Newry was particularly recommended for their approach to planning and policy, as it has implemented a shared data based planning tool which allows all of the different partners in the community, including local businesses and the Council, to feed into the planning tool and identify opportunities for collaboration. The centre was also commended for having an excellent dining offer, late night venues, high levels of co-ordination between partners and clear leadership.

-Visitor Information Centres

6.52 Visitor Information Centres (VIC) provide access to a wealth of detailed, up-to-the-minute information, as well as numerous useful services such as accommodation and tour bookings. All the offices perform to national and regional standards and offer free help and advice from trained tourism experts. There are a number of important VIC's found in the District:

- Newry VIC is situated in Bagenal's Castle, a 16th century house and adjoining 19th Century warehouse sympathetically restored to house the Museum and the VIC.
- Downpatrick VIC is situated in the St Patrick Centre, Market Street. In addition to providing visitor information the centre is also a local distributor of DAERA Fishing Licence & Permits.
- Newcastle VIC is located on Central Promenade in the centre of the town.
- Kilkeel VIC is located in the Nautilus Centre which also houses the Mourne Maritime Visitor Centre, Tracing your Mourne Roots Exhibition and the Mourne Seafood Cookery School.

7.0 Key Findings and Conclusions

7.1 Below is a summary of the key findings that will be used to inform the Local Development Plan.

The District:

- benefits from a wealth of built, natural and cultural heritage assets including an unrivalled link to St Patrick which are strong incentives in attracting visitors.
- is a popular destination but primarily with domestic visitors from NI who visit the area for holiday/ pleasure/ leisure purposes.
- experiences a high number of visits however, a lower than average number of nights are spent per stay and the lowest average spend per trip of all LGDs.
- ranked second of all LGD in terms of the number of jobs in tourism characteristic industries in 2013.
- is recognised for its adventure and outdoor based recreation and its world renowned golf courses and further potential for growth exists particularly as this is a highly seasonal market.
- has the potential to grow boating and yachting opportunities that are currently limited by poor access to waterways and coastline.
- is strategically located between Belfast and Dublin and has port access at Warrenpoint which has further potential to attract the cruise market.
- accounts for 9.8% of available beds in licensed accommodations in NI and although it experiences lower than the NI average occupancy research has indicated that there is a need for additional accommodation in the District including a hotel in Downpatrick to enable visitors to stay and explore the Town and surrounding area.

7.2 These key findings will be used to inform the preparation of the LDP. The LDP will also take account of the Council's Community Plan and Tourism Strategy that are currently in draft form.

7.3 As previously noted the LDP, in line with the SPPS, will contain policies to safeguard tourist assets, together with policies for tourism development such as tourism accommodation, amenity facilities, and holiday parks, and the criteria for

consideration of such proposals. It can also give consideration to identifying potential growth areas.

7.4 In accordance with the RDS 2035 the LDP will promote a sustainable approach to the provision of tourism infrastructure to conserve, protect, and where possible enhance the District's natural environment and built heritage.

7.5 There are many benefits to be gained from adopting a more sustainable approach to tourism:

Environmental Benefits:

- Safeguarding the resource for the benefit of future generations, and
- The protection and enhancement of the special landscapes and features that together form much of Northern Ireland's appeal to visitors.

Community Benefits:

- Real opportunities for community involvement in tourism and the creation of a better climate for development.
- Supporting the local economy and local services – for example, helping to support local transport systems in rural areas.
- Creating new business opportunities.

Benefits to the Tourism Industry:

- Enhanced appeal of Northern Ireland for visitors from those market areas which have a high proportion of discerning and ecologically aware consumers, for example North European countries.
- Opportunities for the development and promotion of environment friendly activity tourism such as cycling, walking, birdwatching, many water based activities, and newer interests including conservation holidays.

Benefits to the Visitor:

- The development of a quality tourist service;
- Better relationships with the local community, and
- Closer involvement with, and better understanding of, both the people and the holiday destination.

(Source: NITB - A Sustainable Approach)

7.6 Proper management and conservation of the resources of the District in a sustainable way is vital if future generations are not to be denied the opportunity to use and enjoy them. This is of particular relevance in the context of sensitive landscapes such as the Ring of Gullion and other locations, which are being threatened by a combination of visitor pressure and an associated demand for

development. The District contains some of Northern Ireland's most dramatic scenery, and has a rich natural and man-made heritage. If the potential of these resources is tapped successfully, there could be a substantial spin-off to other sectors of the local economy.

Appendix 1: National Trust Assets

Rowallane Garden

- A1.1 Rowallane Garden is located immediately south of Saintfield, County Down. The gardens are a mix of formal and informal spaces with many unusual vistas and unique plants from across the world. The Garden, of some 50 acres in total, features a walled garden, a natural Rock Garden Wood, wildflower meadows, a Farmland Walk (taking in the summit of Trio Hill) and a Woodland Walk, as well as a tea-room in the old farm stables, which features a bell-tower. The estate house is the headquarters of the National Trust in Northern Ireland.

Castle Ward

- A1.2 Castle Ward is an eccentric 18th-century mansion and estate looking out over the tranquil waters of Strangford Lough. Castle Ward is open to the public and includes 332 hectares (820 acres) of landscaped gardens, a fortified tower house, Victorian laundry, theatre, restaurant, shop, camping pods, saw mill and a working corn mill. It has a shore on Strangford Lough. Castle Ward was the Winner of Highly Commended Best Visitor Experience, NI Tourism Awards 2014. Events held at Castle Ward include: Pumpkinfest, International Bread Festival, Santa's Grotto and many various Craft Fairs.
- A1.3 Castle Wards sprawling medieval walls and castle gate entrance together with stunning surrounding landscapes have attracted many Hollywood film production companies to film onsite, namely; Game of Thrones TV show, Dracula Untold movie and Frankenstein Chronicles TV show.

Strangford Lough

- A1.4 The largest sea lough in the British Isles, covering an area from Angus Rock at its mouth on the Irish Sea, to the vast sand-flats at its northern end 20 miles (33 kilometres) away. It is one of only three designated Marine Nature Reserves in the United Kingdom. Strangford Lough is a popular tourist destination noted for its fishing and scenery. Strangford Lough is used for activities of leisure - sailing, kayaking, bird watching and diving. There are canoe trails in place and a 'Strangford Lough Activity Map' has been launched as a part of a series of maps produced by the Ordnance Survey of Northern Ireland.

Murlough National Nature Reserve

- A1.5 Murlough National Nature Reserve is a fragile 6000 year old sand dune system located at the edge of Dundrum Bay and the Mourne Mountains. It consists of a network of paths and boardwalks through the dunes, woodland and heath. It is an excellent area for walking and bird watching due to its spectacular. In 2014, Murlough attracted 241,000 visitors making it the No. 1 visitor attraction in the Newry, Mourne and Down Council area. There are two car parks at Murlough, one public with no facilities and the other owned by the National Trust. The National Trust car park includes a toilet block and café. Although a very popular destination,

the National Trust's priority for the site is conservation and consequently there are no plans to increase the site's facilities. The existing facilities provide a welcome destination and point of interest for walkers.

The Mournes

- A1.6 The Mourne mountains contain twelve peaks and include Slieve Donard, Northern Ireland's highest mountain. The area is partly owned by the National Trust and sees a large number of visitors every year. The Mournes are visited by many tourists, hill walkers, cyclists and rock climbers. The Mournes are also one of the nine designated destinations within Northern Ireland.

Derrymore House

- A1.7 Derrymore House is an 18th-century thatched cottage and estate located in Bessbrook. Derrymore is surrounded by unique parkland of magnificent oaks and is full of history, beauty and enchantment. Part of the Ring of Gullion waymarked trail, there are a number of walks to enjoy and breath-taking vistas of the Newry Viaduct and the Mourne Mountains.

Appendix 2: Country Parks, Parks and Forests

Slieve Gullion Forest Park, Adventure Playpark and The Giant's Lair

- A2.1 Slieve Gullion Forest Park covers an area of 2500 acres. The Forest Park offers walking trails, a scenic drive, an Adventure Play park, Giant's Lair children's story trail and Courtyard with coffee shop. The area has some of the best biodiversity in the region and has a multitude of protected areas and visitors have the chance to see wildlife on the Red Squirrel Safari.
- A2.2 The Slieve Gullion Forest Adventure Park provides award winning play facilities for children and young people and has also attained the 'Green Apple Environment Award' and 'NITB Best Tourism Partner Initiative Award'.

Also located within the forest park is The Giant's Lair. The Giant's Lair is an innovative magical living storybook. The Trail takes visitors on a journey of intertwined fairy house and arts features creating a fantastical childhood land of mystery, dragons, giants, witches and fairies. The art in the Giant's Lair is all inspired by the rich tapestry of local legend and mythical folklore on over a mile of woodlands within the Forest Park.

Kilbroney Park

- A2.3 Kilbroney Park is 92 acres in area and offers a wide range of facilities and services, which includes tennis courts, children's play area, playing fields, an arboretum, barbeque and picnic areas and cafe and a well serviced caravan and camping site. There are three waymarked trails, which vary in length from two kilometres to seven kilometres, and take the visitor to various areas within the forest to enjoy the many magnificent views and beauty of the woodlands.
- A2.4 These trails in Kilbroney Park bring to life the story of Narnia and other stories, myths and legends associated with this special area of the Mourne. The Narnia legends are interpreted along a short family loop trail, entered like the magical world itself, through a Wardrobe, and leading the visitor to several interpretative stations with themes including, The Tree People, The Beavers' House, The Citadels and many more. A more challenging walk has been created to the legendary Cloughmore Stone, linking another important legend - that of the Giant Fionn McCumhaill - to the Narnia theme.
- A2.5 The Council produced a draft Masterplan (August 2015) for the park which identifies proposals for the development of Kilbroney Park and Rostrevor Forest. The Masterplan draws focus on projects which have a spatial dimension and sets out how different areas of Kilbroney Park and Rostrevor Forest will work together to provide an enhanced resource for local people and a compelling experience for visitors.

Donard Forest Park

A2.6 There are currently no facilities for recreational activities provided in Donard Forest but the public are welcome to visit this forest on foot. Donard Forest was planted in 1927 and consists of scots and corsican pine, with herbaceous plants and woody shrubs hidden below the tree canopy. This area is the habitat for the Holly Blue butterfly and a wide range of bird species. The Glen River Bridge provides a picturesque viewpoint for the many cascades and waterfalls. Nearby are some ornamental trees including monkey puzzle and giant red wood.

Tollymore Forest Park

A2.7 Tollymore Forest Park was the first state forest park in Northern Ireland, established on 2 June 1955. Tollymore Forest Park caters for many outdoor activities including walking, caravanning/camping, horse riding and orienteering and the park has designated areas for camping and caravans.

A2.8 There are four official walking trails within the forest each marked with different coloured sign posts. All the trails start and end in the main car park. The blue trail (Arboretum Path) is half a mile long and passes through the arboretum. The red trail (River Trail) is three miles long and follows the Shimna River up one side as far as Parnell's bridge and then back along the other side. The black trail (Mountain Trail) is five and half miles long and the black trail 1 (The Drinns Trail) adds another three miles to the black trail by passing behind The Drinns (two forested hills) and following the boundary wall. The Ulster Way also passes through the forest.

A2.9 In March 2015 Tollymore opened a new Nature Play Space for the kids called the 'Big Deer' which is designed for four to eleven year olds. It consists of an impressive wooden play space featuring a giant timber Fallow Deer, castle turret, folly tower and hollow tree all connected through a series of rope-bridges, tunnels, spider webs, basket swings and slides. There are also picnic facilities available.

Castlewellan Forest Park

A2.10 Castlewellan Forest Park caters for many outdoor activities including walking, caravanning and camping, horse riding, orienteering and many others. The park offers camping and caravanning sites with tarmac and grass pitches for the caravan or camping enthusiast.

A2.11 One of the Forest Park's key attractions, the Peace Maze, is one of the world's largest permanent hedge mazes, representing the path to a peaceful future for Northern Ireland. Planted in 2000 with community involvement, it is maturing quickly and visitors attempt to solve their way to the peace bell in the centre of the maze.

A2.12 A brand new play structure has recently been installed in the forest park (March 2015). 'Animal Wood' is designed for four to eleven year olds and is located beside the Peace Maze. Featuring a short path, Animal Wood provides lots of opportunities for playing on wild woodland animals including a badger and its den, a red squirrel and a giant spider. In addition it boasts a wooden play structure with a tower in the image of The Moorish Tower where children can enjoy the climbing wall, fireman's pole and rope-bridge over to a hollow tree stump slide and Red Kite nest.

Delamont County Park

A2.13 The Park features an adventure playground, walking trails, boat trips, a shop, bbq area and visitors centre. It also features a miniature Thomas the Tank Engine Railway. There are five waymarked walks: Mullagh Walk 1km; Garden Walk 1.2km; Strangford Walk 2km; Corbally Walk 4km; and Longwalk 7km. It also provides all year round events such as Magnificent Birds of Prey Display, Silly Tilly Magic Show, Model Aircraft Display, Medieval Artisan Food & Craft Market and Crossgar Vintage Tractor Club. Statistical figures show that Delamont was rated within the top 10 for Country Park/Park/Forest/Gardens in Northern Ireland, attracting 221,000 visitors in 2014.

Drumkerragh

A2.14 There are currently no facilities for recreational activities provided at Drumkerragh but the public are welcome to visit this forest on foot. Drumkeeragh Forest is seven miles south west of Ballynahinch on the lower slopes of Slieve Croob. The forest has mixed coniferous trees. From the forest there are extensive views across County Down. An extensive forest road system allows walkers to access most of the forest.

Mournes

A2.15 The Mournes are visited by many tourists, hillwalkers, cyclists and rock climbers. The Destination Mourne Mountains Tourism Management Plan 2013-18 was published by the Destination Forum Group made up of public and private stakeholders including the former Down District Council, Newry and Mourne District Council and Banbridge District Council. It outlines a collective vision and set of actions to grow tourism at a local level within the signature destination and also fulfil national targets set out in the draft 2020 Tourism Strategy.

A2.16 The Mournes tourism profile is made up of mostly day visitors and visitors from within Northern Ireland with 61% of visitors being families while 21% are couples and 30% of all those visiting participate in hiking/walking. The Tourism Plan identifies that the Mourne Mountains' strengths are:

- Walking and Climbing,
- Scenery, beautiful landscape and views,
- Mountain biking and cycling,
- Seaside, beaches and Newcastle,
- The Mournes and other mountains,
- Silent Valley and
- Outdoor recreation and activities.

A2.17 Playing on these strengths, the vision for the Mournes is “The Outdoor Playground for the North of Ireland” and the objective is to “maximise the Mournes potential to attract and encourage visitors to stay longer and spend more”.

To achieve this vision, key actions are listed under 4 strategic themes:

1. Investment & Infrastructure,
2. Marketing & Promotion,
3. Distinct Visitor Experiences and
4. Building Business Engagement & Sustainability.

A2.18 Key locations in the Mournes Signature Destination are;

- Newcastle
- Silent Valley and Ben Crom
- Tollymore Forest Park
- Dundrum Castle
- Slieve Croob
- Castlewellan Forest Park
- Slieve Donard Resort & Spa Slieve Donard
- Rostrevor Forest
- Tollymore Mountain Centre
- Dundrum Bay Murlough
- Nature Reserve
- Kilbroney Forest Park

Appendix 3: Beaches

Murlough National Nature Reserve

- A3.1 This 5 mile stretch of golden sands is still a key attraction and is hugely popular for swimming, sunbathing and other forms of recreation. In 2014, there were 241,000 visitors to Murlough, a drop of 33% on the previous year figures. However, as detailed in section 6.18, Murlough is still the current most popular beach in County Down and is also rated in the top 10 tourist destinations within Northern Ireland in the NISRA 2014 statistics.

Cranfield Beach

- A3.2 Cranfield beach is an attractive sandy beach with Blue Flag status. Due to the estimated 4000-5000 caravan users who stay in the area over the summer, the beach, the café and local amenities are well used. On many days in the summer Cranfield struggles to cope with the number of visitors. East Coast Adventure host outdoor activities at Chesnutt Caravan Park every summer at the weekends but this is open to the public as well as people staying in the caravan park. Tourists regularly walk from Cranfield to Greencastle on an informal path but few go north towards Kilkeel.

Tyrella Beach

- A3.3 Tyrella Beach is a small, enclosed beach within Dundrum Bay, Downpatrick, County Down. It is a wide, flat, sandy beach two kilometres long and backed by 25 hectares of mature dunes in a conservation area offering scenic walks and an insight into the habitat of local flora and fauna. Tyrella Beach has been awarded the prestigious Seaside Award annually since 1997 and has also maintained the Blue Flag award in 2011 due to the management and cleanliness of the beach. It has also retained its Green Coast Award since 2008. An ideal destination for locals and visitors alike, the clean waters invite water sport enthusiasts and the beach provides a safe haven for families and groups who wish to picnic in a clean environment. The beach boasts a car free zone, off-beach parking facilities and a lifeguard on duty for safe bathing in the summer months and holidays. There is also a tourist information centre nearby offering advice to visitors on the immediate and surrounding area.

Warrenpoint Beach

- A3.4 Warrenpoint Beach is located alongside the Mourne Mountains on the shores of Carlingford Lough. It is a gently sloping shingle beach with well-developed facilities that include shopping and a promenade popular with all types of walkers. It is host to a range of activities including Kayaking, Banana Boating, Jet Skiing, Pier Jumping and canoeing. It is also home to a large salt water swimming pool, one of the last remaining in Northern Ireland.

A3.5 A planning application, LAO7/2015/0369/F, was submitted on 29th May 2015 for the proposed refurbishment of the saltwater swimming pool. The proposal includes the restoration of the Edwardian kiosks with a new public event space, units for a café, additional space for water sport activities and modernised changing facilities. No decision has been made on the application but it is currently recommended for approval (correct as of 9th January 2016).

Newcastle Beach

A3.6 Newcastle Beach is a popular tourist destination located on the South Down coast. Newcastle Beach comprises of sand, pebbles and larger stones and is approximately 2.5 km in length. The major part of Newcastle Beach is backed by a promenade and the seaside town of Newcastle, which has lots of shops, amusements and other attractions. The beach has a very gentle slope with the Mountains of Mourne in the background.

Appendix 4: Activity Centres

East Coast Adventure Centre

- A4.1 East Coast Adventure Centre has a mountain centre nestled just outside the village of Rostrevor, a water sports centres on the shores of Carlingford Lough in Warrenpoint, a Mountain Bike Hire and Uplift service located at the Rostrevor MTB Trails in Kilbroney Forest Park and a Driving Range, Archery and Zip Line Centre located on the grounds of Mourne Park, Killeel.

Tollymore National Outdoor Centre

- A4.2 Tollymore National Outdoor Centre is Sport Northern Ireland's National Outdoor Centre. It offers a range of one day and weekend courses in rock climbing skills, learning to lead and multi pitch climbing, Canadian canoeing, kayaking and sea kayaking, mountain biking, orienteering and coasteering. The centre also offers accommodation.

Acton Adventures, Poyntzpass

- A4.3 Acton Adventures was established in 2005 to open the game of paintball to the people of Northern Ireland. However over the past number of years it has expanded and now offers a full range of corporate and team building activities. Action Adventures offer packages for clubs and team, stags and hens, corporate events and group of friends. Catering and accommodation can also be provided.

Greenhill Y.M.C.A. National Centre

- A4.4 Greenhill YMCA is an outdoor education and residential centre set in a 17 acre site on the slopes of Slieve Donard. Greenhill deliver programmes for schools, colleges, youth groups, cross community groups and church groups and have been established for over 100 years. Activities take place either in the extensive grounds on site or the surrounding area: i.e. The Mourne Mountains, Castlewellan Forest Park and Lake and Tollymore Forest Park. Greenhill has been awarded the Adventure Activity Associations 'Adventuremark' which is awarded only to those Activity Centres that have been inspected and proven to have met the necessary standards for the safe delivery of Adventure Activities as defined by the Adventure Activities Industry Advisory Committee. Accommodation can also be provided within this centre.

Life Adventure Centre, Castlewellan

- A4.5 Life Adventure Centre provides activities such as canoeing and Kayaking, Hill Walking and Rock Climbing, Trail and Mountain Biking, Wet Bouldering and Coasteering, Archery and Clay Pigeon Shooting, Raft Building and Team Quests and camping. The Centre is an 'Adventure Mark' accredited provider, members of the

Institute of Outdoor Learning, affiliated to the 'Association of Mountaineering Instructors' and Silver Recipients in the 2015 'Irish Responsible Tourism Awards' for Best Adventure Provider. They have also been awarded Gold in the Green Tourism Awards 2014.

26 Extreme, Warrenpoint

- A4.6 26 Extreme specialise in the planning of some of the largest outdoor events in Ireland including the Causeway Coast Marathon, The Mourne Way Marathon and the Coast to Coast Multisport Race across Ireland.
- A4.7 On 12th June 2016, the Council in association with 26 Extreme, presented a new Mountain Bike event 'In the Red' for the Rostrevor Trails, as part of the Northern Ireland Festival of Cycling 2016.

Rock and Ride Outdoors, Kilcoo

- A4.8 Rock and Ride Outdoors is Ireland's leading outdoor company providing Mountain Biking, Rock Climbing and Mountaineering courses, coaching and qualifications throughout Northern Ireland and beyond. It is located in Kilcoo and is comprised of three of Ireland's most qualified instructors, Rock and Ride Outdoors offers programmes for anyone from total beginners looking to start a new sport to aspiring instructors looking to make their living in the outdoor industry.

Flagstaff Adventures, Newry

- A4.9 Flagstaff Adventures provides the following Outdoor Activities located in the beautiful Ring of Gullion. It is set on a 120 acre site offering activities such as 4 x 4 Off Roding, Clay Pigeon Shooting, Archery and Paintballing. The centre provides these activities for Large Youth / Sports Groups, on a Hen or Stag parties, or Corporate or Team Building activities from work.

Clearsky Adventure Centre

- A4.10 Clearsky Adventure Centre is an outdoor pursuits centre located in the medieval 'Old Castle Ward' area of the Castle Ward Estate on the shoreline of Strangford Lough. A vast range of outdoor activities are on offer at the activity centre for schools, groups, family fun days, businesses & individuals. These activities include; archery, rock climbing, raft building, laser clay pigeon shooting, orienteering, climbing and abseiling, coasteering, Kayaking and safari boat tours are also on offer. The Centre has recently been awarded the 'Adventuremark' Accreditation.

Appendix 5: Children and Family

Sheepbridge Family Entertainment Centre, Newry

- A5.1 Sheepbridge centre has a state of the art children's indoor play area, called Cheeky Monkeys with a 4 tiered climbing frame, ball pools, bumper boats, battery operated go karts and slides. There is also a Space Quest laser tag arena and the centre has the only bowling alley in Newry and the surrounding area with 10 state of the art, glow in the dark lanes and a retro bowling theme.

Newcastle Rock Pool

- A5.2 The Rock Pool in Newcastle has been open for more than 80 years and is the last open-air sea water swimming pool in Ireland. The pool is open for eight weeks during the summer months.

Coco's Adventure Playground, Newcastle

- A5.3 Coco's consists of an adventure playground, sports court, snake slide, Free Fall, tube slides, assault course and toddlers area including bouncy castle. Coco's is open all year round and is popular for hosting kids birthday parties.

Funky Monkeys, Downpatrick

- A5.4 Funky Monkeys combines a fun playground with a yummy "healthy-eating" cafe offering stay and play, birthday parties and weekly educational classes. The centre is specifically for children aged 0-8 years old, and has an arts and crafts area, and a separate toddler area too.

Funny Farm Adventures, Castlewellan

- A5.5 Funny Farm Adventures is a park with a 6 acre themed Maize Maze, which is the only one of its kind in Northern Ireland. Also available, Mini Digger, Football Wall, Rope Maze, Garden Games, Barrel Train, Laser Clay Shooting, Archery etc.

Mourne Archery Centre, Castlewellan

- A5.6 A place where you can learn the sport of archery with the help of trained archery leaders.

Seaforde Gardens and Tropical Butterfly House

- A5.7 The Tropical Butterfly House is set in beautiful grounds, with hundreds of free flying tropical butterflies, also parrots, reptiles and insects. There are avenues of mature trees, a maze set in the middle of an old walled garden and a children's play area.

Formula Karting: Indoor Grand Prix Kart Racing, Newry

A5.8 Formula Karting, Newry is one of the biggest indoor karting track in Europe. It has tracks on 2 Levels available for racing with overpasses, tunnels, underpasses, ramps, bridges and banked corners. Suitable for teen parties, kids parties, youth or school groups, family day out or just an evening out with friends.

Appendix 6: Festivals and Events

B/E Aerospace Festival of Flight

- A6.1 The B/E Aerospace Festival of Flight is one of the major highlights in Northern Ireland's event calendar, attracting many thousands of visitors. The Festival is a full programme of events in Newcastle that take place in August. The airshow is the centre piece of the Festival where the crowds watch as the sky over Dundrum Bay is filled with the roar of engines.

St Patrick's Day

- A6.2 St. Patrick has been identified as a key signature destination by Tourism NI that will give stand out for Northern Ireland in out of state tourism markets. Downpatrick has been identified as a core hub for this project. Downpatrick boasts a seven day programme of events for the St Patrick's Celebrations including the St Patrick's Day Cross-Community Carnival Parade which attracts over 30,000 spectators. With over 50 events to choose from and a wealth of free entertainment on offer, Downpatrick's St Patrick's Celebrations has something for everyone including a range of concerts, exhibitions, sporting and family events. Tourism NI has recently agreed to award 3 years financial assistance in connection to the St. Patricks festival to the District, in partnership with Armagh, Craigavon and Banbridge Borough Council.
- A6.3 St. Patricks Day in Newry also provides family entertainment with live music, street entertainment, street theatre, comedy, and street performances of Irish Dancing.

Kingdom of Mourne Festival, Kilkeel

- A6.4 This is a two-week festival that is held annually mid-July and mid-August. This festival improves local community relations and it is also a major attraction for holidaymakers. Events include sheep dog trials, street hockey, children's fancy dress, sand castle competitions, vintage vehicles, live open air & pub entertainment, tennis coaching, exhibitions and demonstrations, fishing competitions and a fireworks display.

Warrenpoint Blues on the Bay Festival

- A6.5 The Blues on the Bay Festival takes place in Warrenpoint over the last bank holiday weekend in May. It attracts Blues & Jazz performances and includes many acts throughout the weekend in the selected bars. Music workshops also feature throughout the weekend.

Walking festivals

- A6.6 The Mourne International Walking Festival in June and the Wee Binnian Walking Festival in September offer a wide variety of walks ranging from excellent road and track walks to guided mountain rambles and hikes.

Fiddler's Green Festival, Rostrevor

- A6.7 Fiddler's Green Festival is a family-established annual celebration of Irish music and culture with an international flavour, which takes place in the village of Rostrevor. The Festival includes the annual Hall of Fame award, presented to the person or group who has made a significant contribution to Irish music or culture. The nightly folk club features the best of Irish & International Folk performances.

Hallowtides

- A6.8 Hallowtides is a programme of events with both private and public organisations getting behind the successful and popular festival. It runs in both Newcastle and Downpatrick. The programmes include live music and entertainment, fancy dress completions, pumpkin contests and fire work displays.

Warrenpoint International "Maiden of the Mourne" Festival

- A6.9 This is a two-week festival that happens somewhere between mid-July and mid-August. This festival offers something for all the family, with a range of events including band concerts, outdoor entertainment, sporting events & top celebrity performances, parades, children's events and The Maiden of the Mourne Competition featuring entrants from across the world.

Felie Chamlocha

- A6.10 The South Armagh village of Camlough hosts an action packed festival of music, dancing, storytelling, as well as a series of fun events for all including a tug-of-war, waiter races, duck derby, and of course a fancy dress donkey derby. There are also traditional music workshops, children's art workshops, bus trips, and street parties and are lots of sporting events, including soccer & GAA tournaments, lake swims, road bowls, fishing and shooting contests.

Annalong Harbour Hooley

- A6.11 Annalong Harbour Hooley is a weekend festival beginning mid-August. The main event is the Mackerel Massacre (a fishing competition), followed by a raft race, street theatre, vintage car show, talent competition for children and the Solid Gold Show. This event attracts people on a local and national basis.

Sticky Fingers Festival 'A celebration of Arts for Early Years'

A6.12 Sticky Fingers Annual Festival based in Newry runs throughout the month of October and offers a whole month full performances, workshops and music. The Festival is offered to children from 0 to 12 years old and it has become a landmark event.

Boley Fair Hilltown

A6.13 The Boley Fair celebrates rural traditions and aims to bring rural skills and past-times of a bygone era to a wide audience of local people and visitors alike. Over the five-day period, fair goers can participate in a wide variety of events including music, dancing, sports, traditional skills and family events. The annual festival is centred on the Sheep Show that traditionally takes place on the second Tuesday in July.

Kilbroney Vintage Show

A6.14 The Kilbroney Vintage Show has been running since 1985, and is now recognised as the premier event of its kind in Ireland. Over 1,500 old vehicle enthusiasts descend on Kilbroney Park with their vehicles; there is also a funfair and novelty shows for children, including Clowns, Magic Shows and Face Painters. 2015 marked the 30th Anniversary of the Kilbroney Vintage Show.

Circuit of Ireland

A6.15 In March 2015, Downpatrick held the launch of the Circuit of Ireland, one of the top five sporting events in Northern Ireland. Large crowds gathered to see off the 140 rally cars in the morning followed by rally competitors arriving in St Patrick Square. There was a full programme of entertainment, including a bouncy castle, face painters, balloon modellers, live music and a climbing wall.

Ballynahinch Harvest and Country Living Festival

A6.16 This event, set up to celebrate the pig, potato and pageantry, which Ballynahinch town was once popular for gives children the chance to get up close and personal with their favourite animals. Visitors are entertained by live music, street performers, and face painting. This year's festival took place on Saturday 19th September 2015, and included The Great Ballynahinch Bake Off which saw baking enthusiasts compete for the best apple tart and scones in town.

International Clowns Festival, Downpatrick

A6.17 This event has been held in different locations all over Europe in recent years but this is the first time it has come to Ireland and arrived in Downpatrick for 2015. More than 40 acclaimed clowns descended on the town, entertaining locals and visitors. In addition to the clowns, there were also be pantomimes, jugglers,

magicians, puppeteers, acrobats, bubble artists, stilt walkers, balloon sculptors and face painters.

A6.18 Herring Gutters Festival, Harbour Inn, Newcastle

This local festival is suitable for all the family and runs for one weekend over the summer months July or August. The entertainment includes, The Big Wheaten Bread Bake-off, craft stalls, car treasure hunt, Irish dancers and live traditional folk music.