Newry, Mourne & Down

Tourism Strategy Framework for Discussion

August 2016
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Newry, Mourne and Down District Council is developing a Tourism Strategy for the period 2016 – 2020. This document sets out a discussion framework for the strategic direction of the visitor economy, and the role of the District Council and industry in achieving sustainable growth.

Why is there a need for a Tourism Strategy?

1. Tourism is a key economic sector within the District and was worth £47.7 million to the local economy in 2015.

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 in the country, and the area is already a highly popular destination within Northern Ireland – attracting external markets is now a key challenge.

3. The Review of Public Administration in 2015 resulted in new political boundaries, and the Local Government Reform Programme has strengthened Council’s new roles in relation to local development planning, tourism and economic development. These changes need to be taken into consideration when looking at the future potential of tourism within the area.

4. Strengthening tourism is a high priority for the Council and it has set the goal of the District becoming one of the premier tourism destinations on the island of Ireland. This strategy is designed to be the road-map to achieve this goal.

5. Tourism priorities are being redefined for Northern Ireland as a whole – a new strategy for NMD ensures that the District is firmly in alignment and in a strong position to leverage these priorities.
Market and industry trends

There are a range of factors and trends that are impacting tourism within the destination. Many are global in nature and not unique to NMD. Nevertheless, they need to be taken into account in planning and will invariably shape the priorities to be identified.

1. **Increase in demand for experiences.** Visitors today are seeking deeper, authentic and memorable experiences that allow them to connect emotionally with the local destination and community culture.

2. **A growth in themed tourism.** Themes can differentiate a destination, highlight its unique selling propositions, provide a framework for experience development, clustering, packaging and marketing, and have become increasingly important in positioning and branding a destination.

3. **Changing demographics and generational trends.** There are certain demographic characteristics associated with key cohorts – particularly the Baby-Boom Generation and the Millennials that influence preferences and trip planning behaviour.

4. **Customer segmentation** research has provided a further understanding of travel values and preferences, and has assisted in identifying niche segments that are likely to have an interest in visiting NMD.

5. **Technology and technological innovation** continues to have an impact on the creation of compelling experiences, and how visitors participate in these experiences or select tourism products.

6. **Volatility of global affairs,** such as fluctuations in currency exchange, and issues impacting traveller security and well-being are all factors that can cause unexpected changes in market trends, and need to be fully understood. Brexit is a prime example of events that can have an immediate effect on visitation trends.
The national strategic context – tourism in N. Ireland

2015 Performance

- **4.5m trips**
  - No change on 2014 on total overnight trips in NI.
  - Domestic visitors fell by 4% and external visitors rose by 5%.

- **15.4m nights**
  - Total overnight trips in NI rose by 2%.
  - Domestic overall nights fell by 5%, while external visitors rose by 6%.

- **£760m spend**
  - An increase of 1% on 2015.
  - The domestic market fell by 8% in its value while external visitors’ expenditure rose by 5%.

Supports 58,000 jobs

Place of origin 2015

- NI - Domestic, 49%
- Great Britain, 29%
- ROI, 7%
- Outside UK & Ireland, 15%


The strategic emphasis

**GOAL: grow tourism to a £1 billion export industry by 2025**

- A **visitor-centric approach** that is based on a strong understanding of visitor expectations and motivations.
- A **partnership-based model for the delivery of tourism** that creates a high level of synergy through the effective collaboration of the public and private sectors, with government continuing to play a key enabling role.
- A particular **focus on strategic export markets**, which in turn will require a commitment to quality and to leveraging unique attributes that differentiate the destination.
- An emphasis on **ensuring longer-term relevant skill-sets**.

Tourism NI and the Department for the Economy are currently in the process of developing a NEW ten-year tourism strategy for NI. The vision for the country is that it will become an internationally competitive and inspiring destination.

Anticipated areas of strategic emphasis include:

- The **need for a major proposition** that will have high international appeal and can readily complement the three key propositions in the Republic of Ireland – The Wild Atlantic Way, Ireland’s Ancient East, and Dublin.
- The **importance of developing unique and compelling experiences** that will align with the major proposition and are rooted in a ‘sense of place’.
The NMD policy context

The corporate context

Tourism has been clearly identified by NMD District Council as a key area of focus within the Corporate Plan 2015-2019.

This commitment is further emphasised in the Economic Regeneration & Investment Strategy 2015-2020 where tourism is both a standalone and an integrated theme – one of five. The overarching tourism related objectives are:

1. To become the destination of choice in NI
2. To become NI’s premier outdoor/adventure destination
3. To become one of NI’s finest events destinations

This Tourism Strategy will provide the framework for progressing these goals.

The enabling context

The overarching national and regional strategic planning context is one that supports the sustainable development of tourism through a myriad of policies and programmes. The Background Report prepared by TEAM and NMD’s Tourism Position Paper both provide comprehensive summaries of this context, and the range of departments, agencies and organisations that have the potential to strengthen the development of tourism.

Policies of particular relevance include;

- The Draft Programme for Government Framework 2016-2021 emphasising the importance of nurturing tourism as a high-performing export-led sector. A greater emphasis on co-designing and co-delivering the Programme and securing strategic alignment between outcomes at all levels is anticipated.
- The Strategic Planning Policy Statements for NI published in 2015 that facilitate sustainable tourism development, safeguard tourism assets, support its role in growing the regional economy, and promote a high standard of quality and design.
- The Regional Development Strategy 2035 which provides the strategic planning framework, and the Regional Guidance statements.
- The Rural Development Programme supporting an enhanced level of tourism infrastructure in rural areas to assist in diversifying rural economies.
- A series of local Area Plans and Masterplans, many of which highlight proposals designed to strengthen local and regional tourism assets.
# Overview of strategic context

<table>
<thead>
<tr>
<th>NATIONAL</th>
<th></th>
</tr>
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<tbody>
<tr>
<td>Programme for Government Framework 2016-21 (Draft) – recognises the economic importance of tourism and the potential to grow the tourism industry into a high-performing export-led sector</td>
<td></td>
</tr>
<tr>
<td>Tourism 2015 – forthcoming ten-year strategy for tourism in NI: GOAL – <em>grow tourism to a £1 billion export industry by 2025</em> (i.e. a target growth rate of 6% per annum)</td>
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<tr>
<td>Rural Development Programme + enabling policies – e.g. Strategic Planning Policy Statements</td>
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<tr>
<td>Sector plans and policies – NI Forests, golf, cycling, food tourism, literature and screen tourism</td>
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<tr>
<td>NI Visitor Information Plan 2016-2020 (Draft)</td>
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<tr>
<th>NMD CORPORATE</th>
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<tr>
<td>NMD Corporate Plan 2015-2019 – ... goal of becoming one of the premier tourism destinations on the island of Ireland</td>
<td></td>
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<tr>
<td>NMD Economic Regeneration &amp; Investment Strategy 2015-2020</td>
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<tr>
<td>1. To become the destination of choice in NI</td>
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<tr>
<td>2. To become NI’s premier outdoor/adventure destination</td>
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<tr>
<td>3. To become one of NI’s finest events destinations</td>
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<tr>
<th>Newry, Mourne and Down Community Planning Framework (underway)</th>
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<tbody>
<tr>
<td>• We are a confident, welcoming outward looking society to visit and invest</td>
</tr>
<tr>
<td>• We are an innovative and creative society</td>
</tr>
<tr>
<td>• We prosper through a strong competitive, regionally balanced economy</td>
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<tr>
<td>• We live and work sustainably – protecting the environment</td>
</tr>
<tr>
<td>• We connect people and communities through our infrastructure</td>
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<table>
<thead>
<tr>
<th>REGIONAL - NMD</th>
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<tr>
<td>Regional tourism plans – e.g. Destination Mourne Mountains Tourism Management Plan 2013-2018</td>
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<tr>
<td>AONB and designated landscape plans</td>
<td></td>
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<tr>
<td>Local and regional outdoor recreation and access plans – e.g. Camlough Lake Masterplan</td>
<td></td>
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</tbody>
</table>

| Tourism product development plans – e.g. Mourne Coastal Route draft Masterplan; Maximising the Tourism Potential of St Patrick |
| Feasibility studies – e.g. Slieve Donard Gondola Lift Project |
| Infrastructure studies – e.g. Tourist Accommodation Scoping Study |

| Local area regeneration plans and masterplans – e.g. Downpatrick Town Centre Masterplan; Newry City Centre Masterplan; South East Coast Masterplan |

| Event plans and policies |
Tourism performance & market analysis in NMD District 2015

- NMD accounts for 9% of all overnight trips in NI – this is down 3 points on 2014.
- NMD accounts for 7% of all nights in NI. This is down 3 points on 2014, and represents a 3% decline on NMD nights on the previous year.
- Average length of stay in NMD is 2.6 days (2014 data), which is the lowest in NI.
- Total visitor spend in NMD is £47.7 million representing 6% of all visitor spend in NI.
- In 2015 visitor spend in NMD declined by 12% over 2014, while NI as a whole experienced a 1% increase.
- In 2014 the average spend per night is £36, which is the second lowest for a Local Government District in NI.

Market analysis
- 66% of all visitors to NMD in the period 2013-15 are domestic visitors.
- 48% of the trips to NMD are for holiday/pleasure/leisure and 45% are for the purposes of visiting friends & relatives.

Origin of Visitors 2013-2015
3-Year Rolling Average

- N. Ireland
- Gt. Britain
- Mainland Europe
- N. America
- ROI & Other

Reason for Visit 2013-2015
(3-Year Rolling Average)

- Holiday/pleasure/leisure
- Visit friends/relatives
- Business
- Other

Source: Local government District tourism statistics (additional Tables) NISRA, 2015.
Key target markets

**CULTURALLY CURIOUS**

KEY WORDS – Curiosity, authenticity, insight, independence, immersion in culture, off the beaten track, exploration

FOCUS – Broadening the mind, active sightseeing, historical buildings and attractions, World Heritage sites, events, artisan food and local specialities

**GREAT ESCAPERS**

KEY WORDS – Slow travel, relaxation, rebalancing, getting away from it all, connecting with loved ones

FOCUS – Breath-taking landscapes, ancient sites, remote places, landmarks, restaurants offering fresh, local food, authentic pubs, ease of getting away

**SOCIAL ENERGISERS**

KEY WORDS – Excitement, energy, fun & laughter, adventure, spontaneous, social, the ‘wow’ factor

FOCUS – Entertainment, festivals, contemporary culture and music, clubbing, water sports, the pub experience, shopping, sightseeing

**TIME TOGETHER**

KEY WORDS – Romance, cool nightlife, gentle walking, shopping, relaxation

FOCUS – Good quality food and drink, natural scenery, contemporary cultural experiences, landmarks

**MATURE COSMOPOLITANS**

KEY WORDS – Curiosity, authenticity, insight, exploration, eating out, natural beauty

FOCUS – Relaxation, good quality food and drink, scenic drives, theatre experience, authentic pub experience, good value, key attractions

**FAMILY FUN**

KEY WORDS – Fun, quality time, safe, child orientated attractions and entertainment, memories

FOCUS – Value for money offers, family accommodation, café, activities

**YOUNG & LIVELY** (ROI only)

KEY WORDS – Entertainment, energy, social, urban, cool nightlife, the ‘wow’ factor

FOCUS – City experience, contemporary culture and music festivals, events, the local scene, street animation

Growth prospects

The markets with the most promising fit for what NMD has to offer, are those GB and overseas markets that were highlighted in the DETI workshop for the forthcoming Northern Ireland Tourism Strategy. These are the Culturally Curious, the Great Escapers, and the Social Energisers. In addition, the following ROI segments remain important target markets for this Tourism Strategy.
Appraising the current situation

How was this appraisal undertaken?

To date the planning process has involved:

• Extensive desk research on national, regional and local policies, strategies, and plans relating to tourism, economic development, infrastructure, land-use planning, and additional areas such as heritage and culture.

• Participation in the Department for the Economy/Tourism NI planning process for the forthcoming NI Tourism Strategy.

• Regional industry forum and discussion-presentations with key national and District stakeholders, and with the NMD Tourism Task and Finish Group.

• Extensive one-on-one consultation with national governmental organisations and agencies, and key players within the District.

• Stakeholder electronic survey with 86 respondents.

• Site visits of towns, villages, and attractions.

NMD Strengths

An assessment of the industry and the destination has highlighted significant strengths and a strong basis for building a destination that can compete more effectively in the external markets.

• **Outstanding scenic beauty** with the unique combination of mountains, coast, market towns and fishing villages.

• **An exceedingly rich cultural heritage** with a tapestry of legends and a wealth of authentic arts, culture and music – includes strong literary and film associations (Game of Thrones and Narnia).

• **Maritime, industrial and farming heritage**.

• Strong domestic recognition for **adventure and outdoor-based recreation**, and increasing strengths in mountain biking opportunities. Improved access infrastructure on public lands and recent enhanced cooperation between public land owners.

• World renowned **golf courses**.

• **Strong local government commitment** to facilitate the development of tourism.

• Significant **emphasis on sustainable tourism** and the development of opportunities within a carefully managed framework – particularly within the AONBs.
Strategic issues

In analysing opportunity there is a need to assess it strategically from the consumer’s perspective, and to keep this assessment in alignment with the strategic approach of DfE and Tourism NI. Clearly there is a significant potential to strengthen the competitiveness of the destination and to build on the wealth of natural and cultural assets. However, there are a range of issues and factors that are currently constraining growth and need to be addressed in the tourism strategy.

1. There is an over-dependence on NI visitors and a high degree of seasonality. This is not a unique issue, but it does indicate that the emphasis should be on growing the external higher-yield markets and attracting visitors year-round.

2. NMD is well positioned between two main gateways (Belfast and Dublin) and is approximately one hour from each of these major markets. In translating this advantage into growth, the current situation is one where day visitation dominates and the potential benefits of location have failed to accrue.

3. NMD has significant tourism products and assets but no unified market identity. There is a long list of ‘things to do’, but no cohesive sense of ‘promise’ or strategic positioning which has the effect of a seemingly disjointed destination experience in the market place.

4. There is a wealth of stories and themes that can be utilised for the development of immersive experiences. While there has been an effort to build new experiences (particularly in the upland areas), there has not been a regional approach to developing consensus on the key stories as yet.

6. In the absence of a unified identity the messaging in the marketplace is fragmented, varies in quality, and at times is duplicated. This fragmentation carries over into the digital promotion of the area.

7. Transportation linkages within the District are weak and the lack of sufficient signage in areas is problematic.

8. The planning of countryside infrastructure is not sufficiently integrated to maximise outdoor recreation opportunities. Management remains fragmented.

9. The accommodation base has inherent weaknesses relating to the type, quantity, quality and location. Considerable effort has been put toward identifying accommodation needs, particularly where the absence of adequate accommodation is clearly constraining growth. Downpatrick is a prime example of an area that needs further investment in new room stock.

10. NMD is primarily an ‘outdoor’ destination and there is limited wet weather product. This exacerbates the issues associated with seasonality. Furthermore, the District lacks a strong ‘flagship’ product or experience.

11. The role of towns in driving visitor spend and acting as effective gateway locations is understood in theory, but further emphasis is needed in realising this potential and ensuring that there is a strong sense of place, and an evening economy that aligns with the target markets.

12. Industry is generally characterised by limited effective networking and collaboration, and the absence of a cohesive approach to developing tourism.
VISION 2020 (draft)

Newry, Mourne & Down is a premier, year-round destination in Ireland recognised for its EPIC experiences in outdoor adventure, its rich tapestry of cultural heritage, and its authentic local life. The District’s stories of the past are embraced and the distinctive appeal of the area is highlighted in new stories of fun, challenge and engagement. The entrepreneurial and customer-focused industry works collaboratively to promote and deliver EPIC moments and advance the sustainable growth of tourism.

OUR PROMISE – Delivering EPIC moments

GOALS
1. To focus on developing new and strengthening existing visitor experiences that will deliver ‘EPIC moments’.
2. To enhance the positioning of NMD as a destination that delivers ‘EPIC moments’.
3. To work collaboratively toward assisting NI achieve its targeted growth rate of 6% per annum in overnight expenditure.
4. To build a unified and entrepreneurial industry that is customer-focused.
5. To strengthen industry capacity and community awareness of tourism.
6. To ensure that the development of tourism is undertaken sustainably and contributes to the enhancement of social, cultural and environmental values.
Strategic framework

**OUR PROMISE**

Delivering EPIC Moments

**STRATEGIC DIRECTIONS**

- A focus on experiences and telling the story
- A commitment to game-changing projects and critical infrastructure
- A compelling market presence & position
- A joined up approach – leadership & product

**EPIC – a stretch target for experiences**

- EPIC tales and trails
- EPIC adventure
- EPIC family fun
- EPIC landscapes
- EPIC block buster settings
- EPIC arts
- EPIC events
- New EPIC attractions

**EPIC – a stretch target for industry**

- Customer-focused
  - E = Experiential
  - P = Personalised
  - I = Iconic; Innovative; Immersive; Indulgent
  - C= Creative

**SUSTAINABLE**

- Social, cultural, environmental

- Economic growth

- Supportive community

Rich tapestry of cultural heritage

Collaborative

Customer-focused

Authentic local life

Premier, year-round destination

EPIC experiences in outdoor adventure

Stories of the past....

Today’s stories of fun, challenge and engagement
Tourism is a critical economic driver in NMD. It plays a key role in creating jobs; diversifying the rural economy; ensuring the viability of smaller community businesses; celebrating local cultural heritage values; providing a rational for maintaining the integrity of landscapes and ecosystems; and, a business case for investing in community infrastructure and sense of place.

Achieving the vision and goals will be the basis for realising these benefits and improving the overall well-being of NMD residents. To be successful, however, will require a new mindset – one that sees tourism as everyone’s business, and one that understands the value of tourism to everyone.

An emphasis on collectively pursuing the four strategic directions will create the momentum that is needed to make a difference.

1. A focus on experiences and telling the story
2. A commitment to game-changing projects and critical infrastructure
3. A compelling market presence and position
4. A joined up approach – leadership and product

On first appearances, these strategic directions may not seem to offer a fresh approach. The challenge, however, requires working together to move forward on each direction in an integrated manner. To bring the concept of EPIC to life necessitates thinking, planning, working and delivering in a collaborative and cohesive manner that puts aside any tendencies toward a more parochial approach.

The reconfiguration of Council boundaries offers new opportunities to rethink the role of partnerships within the District, and working relations with agencies and stakeholders external to the District. Identifying and pursuing these opportunities within this strategic framework and in alignment with the forthcoming NI Tourism Strategy is a fresh approach and one that will generate measurable success.
The conversation moving forward

The proposed planning workshops and ongoing stakeholder consultation have an important part to play in determining future priorities. There are clear issues to be addressed and impressive strengths to be leveraged. Advancing the conversation on the four strategic directions, gaining consensus on priorities, and developing ‘ownership’ for a new way forward are critical next steps of the planning process.

The discussions are likely to consider the following:

1. **A focus on experiences and telling the story**
   - Identifying the key stories and themes as the basis for developing new experiences, including events
   - Recognising the need for a stronger thematic/clustered approach to developing the destination
   - Adopting the principle of a hierarchy of experiences and developing key signature experiences that epitomise the strengths of the destination and can act as major ‘hooks’, together with supporting experiences

2. **A commitment to game-changing projects and critical infrastructure**
   - Reaching consensus on game-changing projects and determining shorter and longer-term steps
   - Working with the NMD Council to assist in prioritising existing community and tourism infrastructure proposals
   - Identifying new growth markets on the basis of capital investment in infrastructure

3. **A compelling market presence and position**
   - Exploring how to utilise the concept of EPIC as the basis for strengthening the market position of NMD and its visitor experiences – i.e. the use of the concept to motivate industry in delivering exceptional experiences
   - Determining cost-effective solutions to communicate effectively with visitors – including digital and social media strategies
   - Developing a clear region-wide understanding of the market position
   - Identifying visitor information needs

4. **A joined up approach – leadership and product**
   - Assessing more effective ways of working together to promote and deliver experiences – a joined-up approach relates both to a new collaborative style of working and a new way of defining visitor destinations and destination or sector experiences
   - Evaluating industry capacity to deliver EPIC moments and labour requirements to ensure successful growth

These discussions will play a significant role in shaping the strategy and action plan.
## Appendix: Tourism performance in NMD District 2015

<table>
<thead>
<tr>
<th>LGD</th>
<th>Number of trips</th>
<th>% of NI trips</th>
<th>Total spend</th>
<th>% of NI spend</th>
<th>Av. Length of stay (2014 data)</th>
<th>Av. spend/night (2014 data)</th>
<th>2013-15 % domestic visitors</th>
<th>Hotel rooms + other rooms</th>
<th>Av. hotel room occ.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antrim &amp; N’abbey</td>
<td>204,290</td>
<td>4%</td>
<td>£34.2m</td>
<td>4%</td>
<td>3.6</td>
<td>£51</td>
<td>42%</td>
<td>631+1,788</td>
<td>61%</td>
</tr>
<tr>
<td>Ards &amp; N. Down</td>
<td>376,755</td>
<td>8%</td>
<td>£51m</td>
<td>7%</td>
<td>3.5</td>
<td>£28</td>
<td>52%</td>
<td>299+568</td>
<td>54%</td>
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<tr>
<td>ABC</td>
<td>149,449</td>
<td>3%</td>
<td>£22.5m</td>
<td>3%</td>
<td>3.3</td>
<td>£37</td>
<td>43%</td>
<td>208+266</td>
<td>55%</td>
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<td>Belfast</td>
<td>1,361,193</td>
<td>29%</td>
<td>£278m</td>
<td>37%</td>
<td>3.2</td>
<td>£67</td>
<td>30%</td>
<td>3,386+2,711</td>
<td>77%</td>
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<td>CCG</td>
<td>911,388</td>
<td>20%</td>
<td>£136.8m</td>
<td>18%</td>
<td>3.6</td>
<td>£49</td>
<td>66%</td>
<td>723+4,221</td>
<td>59%</td>
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<tr>
<td>Derry &amp; Strabane</td>
<td>223,172</td>
<td>5%</td>
<td>£42.5m</td>
<td>6%</td>
<td>3.5</td>
<td>£49</td>
<td>38%</td>
<td>659+1,051</td>
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<td>Fermanagh &amp; Omagh</td>
<td>341,051</td>
<td>7%</td>
<td>£54.6m</td>
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<td>2.8</td>
<td>£60</td>
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<td>415+1,360</td>
<td>59%</td>
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<tr>
<td>Lisburn &amp; Castlereagh</td>
<td>130,924</td>
<td>3%</td>
<td>£24.9m</td>
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<td>4.0</td>
<td>£48</td>
<td>21%</td>
<td>255+224</td>
<td>52% (2014)</td>
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<td>MEA</td>
<td>382,224</td>
<td>8%</td>
<td>£45.6m</td>
<td>6%</td>
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<td>£47</td>
<td>52%</td>
<td>479+463</td>
<td>64%</td>
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<td>Mid Ulster</td>
<td>155,708</td>
<td>3%</td>
<td>£22.3m</td>
<td>3%</td>
<td>2.9</td>
<td>£43</td>
<td>51%</td>
<td>238+271</td>
<td>48%</td>
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<tr>
<td>NEWRY MOURNE DOWN</td>
<td>404,442</td>
<td>9%</td>
<td>£47.7m</td>
<td>6%</td>
<td>2.6</td>
<td>£36</td>
<td>66%</td>
<td>529+1,294</td>
<td>55%</td>
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</table>
“All our dreams can come true, if we have the courage to pursue them.” (Walt Disney)

“A dream doesn't become reality through magic; it takes sweat, determination and hard work.”
(Colin Powell, former US Secretary of State)

Please indicate which session you will attend by contacting:
Newry Visitor Information Centre at 028 3031 3170 or newryvic@nmandd.org OR
Newcastle Visitor Information Centre at 028 4372 2222 or newcastle.vic@nmandd.org