



Comhairle Ceantair
Lár Uladh
Mid Ulster
District Council

MID ULSTER

Position Paper Eight

Tourism

2 June 2015

- Purpose:** To provide the Council with an overview of Tourism and implications for Tourism Development in the Mid Ulster Area.
- Content:** The paper provides information on:-
- (i) An overview of the Regional Policy context for tourism;
 - (ii) Identification of the Key Departments, Agencies and Bodies with a tourism role in Northern Ireland and within Mid Ulster and an overview of their related strategies and plan.
 - (iii) An overview of tourism policy within current Area Plans and Masterplans.
 - (iv) An overview of tourism in Northern Ireland and consideration of the tourism sector within Mid Ulster Area.
 - (v) An outline of the Tourism Strategy for Mid Ulster
- Recommendation:** That the Council consider the findings and considers the proposed Tourism Development options for the Mid Ulster Council Area.

1.0 Introduction

- 1.1** The aim of this paper is to inform members on the issues regarding the tourism sector in Mid Ulster and considerations for the new Area Plan. Its purpose is to allow informed choices of strategic options of how tourism will be addressed in the Plan by outlining the needs and assets of the combined Magherafelt, Cookstown and South Tyrone/Dungannon Areas. The paper will also examine the responses from various public bodies with a responsibility for tourism development.
- 1.2** In preparing a Development Plan, due regard should be given to the importance of tourism to the Region's economy and to its potential to assist economic and environmental regeneration. Policy considerations should include those which enable tourism to develop in an integrated and sustainable way and which:

In partnership with other agencies:-

- (i) Identify the various assets and resources necessary for tourism in order to protect, manage and enhance and promote these;

- (ii) Identify, review and introduce management measures for areas and environments which are under pressure from visitors with a view to ensuring that any additional development is compatible with the carrying capacity of the proposed location and where appropriate reducing pressure on designated landscapes by the identification of sustainably located alternative attractions;
- (iii) Improve the quality and range of attractions and accommodation in the region, compatible in scale, design and nature with their setting and minimising traffic.

2.0 Regional Policy Context

2.1 One of the Key Commitments of the Northern Ireland Executives “Programme for Government (PfG) 2011 – 2015” is to increase visitor numbers 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 the people and the environment, build a strong and shared community and deliver high quality services.

(a) Regional Development Strategy

2.2 All new plans and planning policies must be in general conformity with the Regional Development Strategy 2035 which is an overarching strategic planning framework for the whole of Northern Ireland. In devising any strategy, consideration needs to be given to the existing regional wide policies as found within this document.

2.3 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 in the years to come. There are a number of Regional Guidelines (RG) within the RDS which fundamentally seek to guide the long term policy direction that should be undertaken in Northern Ireland. (Regional Guidance (RG) – This applies to everywhere in the region and is presented under the 3 sustainable development themes of Economy, Society and Environment). The following commitments are of relevance:

- Maximise the potential of the Regional Strategic Transport Network (RG2) - Mid Ulster with its central location is ideally suited as a stop- off point or base for undertaking visits to various destinations in the region.
- Promote a sustainable approach to the provision of tourism infrastructure (RG 4) - Promote a balanced approach that safeguards tourism infrastructure, improving facilities for tourists while benefiting society and the economy.
- Conserve, protect and, where possible, enhance our built heritage and our natural environment (RG11) - 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.

- 2.4 The RDS recognises the three service centres of Cookstown, Dungannon and Magherafelt and their position as a cluster close to both Lough Neagh and The Sperrins as providing opportunities in the tourism sector. In addition, Lough Neagh and The Sperrins are recognised as “Strategic Natural Resources” within the rural area.
- 2.5 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).
- 2.6 The RDS has identified Lough Neagh and The Sperrins as strategic natural resources and promotes improving facilities for tourists in support of the Tourist Signature Destinations. The concept of Signature Projects was introduced to align tourism investment to those developments that would act as the catalyst to create international stand out for Northern Ireland. No Signature Projects are located in the Mid Ulster District. Therefore it is important to recognise that the RDS has failed to identify any specific Mid Ulster projects as signature projects.

(b) Draft Strategic Planning Policy Statement (SPPS)

- 2.7 In preparing Local Development Plans 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 wider government tourism initiatives (e.g. *Signature Projects*), and may address the following; how future tourism demand is best accommodated; safeguarding of key tourism assets; identification of potential tourism growth areas; environmental considerations; and contribution of tourism to economic development, conservation and urban regeneration.
- 2.8 The SPPS advises that policies to safeguard tourist assets will be contained in LDPs, 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.
- 2.9 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 this supports rural communities and promotes a healthy rural economy and tourism sector. Farm diversification, the re-use of rural buildings and appropriate redevelopment and expansion proposals for tourism purposes will normally offer the greatest scope for sustainable tourism development in the countryside. Such proposals may occasionally involve the construction of new buildings.

The policy objectives within the draft SPPS for tourism are to:

- 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, location and scale in rural areas; and
- ensure a high standard of quality and design for all tourism development.

(c) Existing Planning Policy Statements

- 2.10** Planning Policy Statement 16 (PPS16) Tourism 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 in itself requires a countryside location; hotel, guest house and tourist hostels in the countryside where it replaces and 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.
- 2.11** Due to the importance of our natural heritage and our built heritage assets in relation to the tourism industry both Planning Policy Statement 2 (PPS2) Natural Heritage and Planning Policy Statement 6 (PPS6) Planning, Archaeology and Built Heritage are frequently key policy considerations in planning applications for tourism development.
- 2.12** As discussed, the Mid Ulster Area benefits from access to two Strategic Natural Resources in the form of Lough Neagh to the east and the Sperrins Mountains to the west. Both areas have numerous forms of site specific zonings and designations which seek to protect their distinctive qualities. Such protections are not solely centred on these two areas alone. Other areas throughout the Mid Ulster Area also benefit from the recognition of a site specific designation (for example a Site of Local Nature Conservation Importance). On the whole, a sustainable approach in protecting such natural assets whilst at the same time allowing appropriate forms of development to occur is the fundamental aim of PPS2.
- 2.13** PPS 6 seeks to protect and conserve our local built heritage in a sustainable and viable way through the implementation of appropriate policies. The document recognises that the cultural and environmental value of features of the archaeological and built heritage can help promote an area as a visitor destination which can generate widespread economic benefits through tourism and leisure; however, it is also recognised that tourism and recreation

development can damage and destroy the assets it seeks to exploit through excessive visitor numbers, inappropriate development and other forms of adverse impact. Again, the role of planning in this instance is to seek a balanced approach, ensuring that the growth and development of tourism based on heritage assets is compatible with proper long-term conservation.

- 2.14** Planning Policy Statement 8 (PPS8) Open Space, Sport and Outdoor Recreation recognises the importance of the countryside for recreation and the contribution it can make to both the rural economy and promotion of tourism. In addition, Planning Policy Statement 21 (PPS 21) sets out planning policies for development in the countryside. There are a range of types of development which in principle are considered to be acceptable in the countryside that will contribute to the aims of sustainable development. Tourism Development which complies with PPS 16 will meet the test for meeting Policy CTY 1 within PPS 21.

3.0 Area Plans and Master Plans covering Mid Ulster

- 3.1** The Area Plans for Dungannon, Cookstown and Magherafelt are the statutory plans for the Mid Ulster District and provide the framework against which to assess development proposals. The three main towns also have their own Town Centre Masterplan which were completed by the Department of Social Development (DSD) in conjunction with the local council and concerned with urban regeneration initiatives in each respective town centre.
- 3.2** Policies within the respective development plans which are related to tourism development are laid out below as well as any relevant information contained within each town centre masterplan.

Dungannon and South Tyrone Area Plan 2010:

- 3.3** The Plan recognises that Tourism in Dungannon and South Tyrone Borough is based predominantly on the area's natural and built heritage, with Lough Neagh and the Clogher Valley providing the major focal points for a range of recreational and tourism activities as well as attractions such as Peatlands Park, Parkanaur Forest Park, and the Grant Ancestral Home. At the time of its publication, the promotion and marketing of tourism was primarily the responsibility of Dungannon and South Tyrone Borough Council which also operated and supported a wide range of tourism-based facilities such as picnic, caravan and amenity sites, e.g., Dungannon Park and Round Lough, Fivemiletown. Other public agencies such as DARD and NIEA have opened up historic and specialist interest sites to the public e.g. Parkanaur Forest Park, Mountjoy Castle and Knockmany Passage Tomb, and provided facilities such as walks, caravan and camping facilities. Most tourism accommodation, such as hotels and self-catering chalets, is provided by the private sector which also contributes to the provision of other tourism and associated facilities such as restaurants, cafes and craft shops. The DSTAP contains two Area Plan specific policies related to Tourism Development;

3.4 *Plan Policy TM 1 – Tourism Opportunity Zones:*

The Area Plan designates two Tourism Opportunity Zones at Mountjoy and Washingbay, both of which are directly located alongside the shore of Lough Neagh. Both sites are located outwith a settlement development limit as designated in the plan and are therefore located within the rural area. The Plan does not discriminate against Tourism development outside these Zones and stipulated they would still be given consideration and determined in line with the provisions of prevailing regional planning policy.

3.5 *Plan Policy TM 2 – Design of Tourism Development:*

This policy states that all proposals for new tourism development in the area will be required to meet a set criteria, including;

- Proposal to respect topography and character of local landscape and features of nature conservation or heritage interest;
- Form, scale, design and character of the development should be appropriate to the locality;
- There should be no significant detrimental impact on the amenities of any adjoining residential properties; and
- The proposal should meet the requirements of people with disabilities or special needs.

Dungannon Masterplan

3.6 The Masterplan focuses on achieving the agreed vision for the town, which is that in 2025 Dungannon will be a vibrant, competitive town with a distinctive and historic character and will compete effectively with other Town Centres in NI. It recognises the importance of tourism and town centre regeneration. It aims to project this vision through the development of existing and proposed opportunity sites, with each one contributing to the overall regeneration of the Town Centre.

3.7 Dungannon Regeneration Partnership (DRP) comprising of representatives from the public, private and community/voluntary sectors was set up and funded by Dungannon and South Tyrone Borough Council to encourage and promote the regeneration, development and prosperity of Dungannon Town. Since the launch of the Dungannon Regeneration Strategy in 2002, DRP in conjunction with the Council has been actively rolling out a number of initiatives and projects to further the social and economic and physical regeneration of the town:

- A new brand identity for the town was developed. The "Dungannon Altogether Better" campaign is aimed at raising awareness of the town's many attractions, particularly as more than one million people live within an hour's drive of the town centre.
- Aim to enhance tourism and recreation product development and promotion. This included Castle Hill Redevelopment and a review of the current cultural / sport programme for the town. Works at the Castle Hill Redevelopment are ongoing however a review of the cultural / sport programme for the town has not yet been completed.
- Emphasis placed on developing the Market Square and Anne and Irish Street in addition to a number of other areas focused on improving the visual

amenity and accessibility of the Town Centre. A number of opportunities, retail / leisure orientated have been highlighted within Market Square, the development of these sites which is ongoing at present is to help improve the function and vitality of the Square and encourage people into the Town Centre. To ensure the future growth of centre as the primary retail core and to develop as the focal point to the Town Centre, providing locals and visitors with a unique public space which is lively and pedestrian friendly.

- Ranfurly House has been developed as an Arts / Heritage / Education Centre, with a rear extension into 'Castle Hill'. Castle Hill is proposed to be developed and preserved as a historic public park (works on-going).
- A number of potential linkages have been highlighted to improve accessibility to and from Castle Hill including the creation of a new pedestrian entrance to the Park to improve the linkage between the Park and the Market Square, and subsequently the rest of the town. The master plan states the, 'historical significance of Market Square should also be promoted by encouraging links with Castle Hill and highlighting its role as part of the Heritage Trail. Focusing the area on retail and leisure uses provides the opportunity to develop the evening economy. This should be complimented by Market Square being the primary area for events within the Town Centre.'
- The Anne Street / Irish Street area should be developed into a 'cultural quarter' whereby particular care should be given to conserving the unique design features of the existing buildings. The area would offer niche retailing, evening entertainment such as bars / restaurants, as well as establishing a café culture.
- Reinforces the Castle Hill redevelopment as a key opportunity, the project will enhance the historic role of the Town Centre, complimenting the heritage trail and building a unique visitor experience, complimented by the promotion of nearby Irish Street as the 'Cultural Quarter', the benefits of which will snowball down to local businesses and the local community.

Cookstown Area Plan 2010:

- 3.8** The Cookstown Area Plan 2010 recognises that Tourism in the area is based predominantly on the area's natural and built heritage, with Lough Neagh and the Sperrins providing the major focal points for a range of recreational and tourism activities. Built Heritage assets such as Wellbrook Beetling Mill, Springhill House and the historic plantation settlement of Moneymore and also recognised for their ability to generate tourism revenue. The plan recognises that a vibrant tourism sector depends on a quality host environment and its expansion must be based on provision of quality tourism facilities and accommodation that contribute to the sustainability of the industry.
- 3.9** According to the CAP, there are four key areas the former local council, through the Local Area Economic Development Strategy, targeted investment for tourism in the area.

1 – the promotion of sustainable tourism based on important features of the districts archaeological heritage such as Ardboe Cross, Beaghmore Stone Circles and Tullaghoge Fort;

- 2 – the development of increased access to the countryside through the provision of a cycle network and public walks, incorporating improved services and interpretation facilities at specific locations across the district;
- 3 – the development of a recreation and amenity centre at Loughry College; and
- 4 – Continuing support for the Sperrin Tourism Partnership and Lough Neagh Tourism marketing initiatives.

3.10 The CAP contains three Area Plan specific policies related to Tourism Development;

Plan Policy TM 1 - Tourism Opportunity Zone:

Tourism Opportunity Zones are designated at Davagh Forest and Curran Quay/Kinturk Road. Within these zones favourable consideration will be given to proposals for tourism and recreational development provided the proposal integrates appropriately with its surroundings, provides adequate infrastructure and will not have any significant detrimental impact on conservation interests. Lough Neagh and the Sperrins are the principal natural assets likely to attract visitors to Cookstown District. However, the important conservation interests of these areas are likely to limit tourism development opportunities. Accordingly, the Department designated Tourism Opportunity Zones within these areas it considered capable of best accommodating sympathetic and sustainable tourist schemes.

3.11 *Plan Policy TM 2 - Tourism Conservation Zone:*

A Tourism Conservation Zone is designated in the Sperrins. Planning Permission will be refused for proposals for new tourism development in this zone with the following exceptions;

- minor improvements to facilitate tourism infrastructure;
- the provisions of tourism accommodation or facilities through the reuse of existing vernacular buildings.
- Such proposals should respect and be sensitive to the character of the local landscape and wildlife heritage interests.

Within the Sperrins the Department designated a zone where the quality and character of the landscape is considered so special and the conservation interests so significant that there will be a presumption against new tourism development proposals. Only minor development or the reuse of traditional buildings where these are sympathetic to the character of the local landscape and heritage interests will be approved. This will assist the promotion of tourism in the area by helping to conserve its key environmental and historic assets.

3.12 *Plan Policy TM 3 - Design of Tourism Development:*

Proposals for new tourism development will be required to promote quality in design and meet all of the following criteria;

- The proposal should respect topography, the character of the local landscape and features of nature conservation or heritage interest;
- The form, scale design and character of the development should be appropriate to its townscape or landscape setting;
- The proposal should make use of materials appropriate to the locality;

- There should be no significant detrimental impact on the amenities of any adjoining residential properties; and
- The proposal should meet the requirements of people with disabilities or special needs.

Cookstown Masterplan

- 3.13** The Cookstown Masterplan does not specifically refer to Tourism or any Tourist Projects. It does however identify “Variety” as one of its key priorities stating:

“Variety – Leisure, entertainment, sporting and recreational pursuits in city and town centres provide other uses for town centres for the local community and visitors to the area. Evening and night time economies are now an integral element contributing to the vibrancy of towns and can work supportively with town centre living”.

- 3.14** It also details 8 regeneration objectives, all of which, if implemented, could encourage Tourists to the Town. The Cookstown Masterplan was informed by a Commercial and Leisure Capacity Study (Tom Phillips and Associates 2010). One of the key findings of this study states that “notwithstanding the tourist and retail role played by Cookstown there is further potential capacity for bar/wine bar, fast food/takeaway and restaurant type facilities in and around the town centre area, whilst cinema, public house, casino and betting office provision would appear to be well catered for at the current time”

Magherafelt Area Plan 2015:

- 3.15** The Magherafelt Area Plan 2015 was published in December 2011 and provides a planning framework for the growth and development of the Magherafelt area. The plan offers no specific plan policies with regards to tourism development in the area, but also acknowledges the strengths of the region in this area rest predominantly with the rich natural environment features and built heritage features to be found there. Specific reference is made to Lough Neagh and its waterways, the Sperrin Mountains and the areas built heritage including historic buildings such as Bellaghy Bawn, and historic monuments such as St. Lurach’s old church in Maghera.

Magherafelt Town Centre Masterplan

- 3.16** The Magherafelt Town Centre Masterplan was published in May 2011 and identifies a range of proposals including public realm improvements, development of opportunity sites and a range of smaller initiatives to be delivered in the short term. A retail capacity survey was carried out for Magherafelt Town Centre in formulating and helped inform and establish the context for the Masterplan.
- 3.17** The Masterplan identifies several projects which could help build upon the leisure and entertainment sector including working towards the ‘Purple Flag’ accreditation, development of a heritage trail and the development of key opportunity sites.

3.18 In general the Masterplan focuses on retail and ‘commercial leisure’. A key objective is that vacant units will be occupied and the Town Centre will further establish itself as a lively leisure hub with a thriving evening economy building on the existing leisure and entertainment offer e.g. dining, ‘night time economy’, ‘café culture’ etc. One opportunity site is highlighted in particular, namely, Fairhill Industrial Estate with the potential of being redeveloped as a large scale entertainment complex. The masterplan includes a commercial leisure assessment which revealed the following key findings:

- The per head leisure goods expenditure in the Magherafelt area is approximately 0.5% higher than the UK average in 2010. The adjusted total leisure goods expenditure in this area will rise from £80.8 million in 2010 to £118.7 million in 2025;
- However, notwithstanding the availability of this leisure expenditure, our qualitative assessment indicates that Magherafelt Town Centre has a limited overall commercial leisure offer;
- The household surveys highlight that there is very little linkage of shopping trips with commercial leisure uses;
- The household surveys also highlight very limited usage of commercial leisure activities in Magherafelt Town Centre by the vast majority of survey respondents. The key exception relates to restaurants;
- Data from the Northern Ireland Tourist Board (NITB) highlights that the Magherafelt Local Government District (LGD) attracts less tourist expenditure than surrounding LGDs; and
- Combined with the high number of vacant outlets in the Queen Street detracts from the overall vitality of the street as a key Town Centre retail location.
- Overall, our findings indicate significant potential for future commercial leisure development in Magherafelt Town Centre area.

3.19 The commercial leisure assessment concluded with two main recommendations regarding Magherafelt:

- *Magherafelt Town Centre should be promoted as the focus for the vast majority of commercial leisure activity in order to help improve the overall commercial attraction of the Town Centre area and to increase the linkage between Town Centre commercial leisure and retail activities; and*
- *However, new development on specific sites should not be considered in isolation from the rest of the Town Centre area. Providing quality linkages are key to integrating further commercial leisure activities in the Town Centre area.*

3.20 The Masterplan identifies several projects which could help build upon the leisure and entertainment sector including working towards the Purple Flag accreditation, development of a heritage trail and the development of key opportunity sites. The ‘Explore Magherafelt’ is beginning to address the promotion of Magherafelt however detailed strategy on developing the ‘Evening and Night Time Economy’ would also benefit the Town Centre. The Masterplan also highlights the need for a comprehensive events strategy and guide – Town

Centre events are crucial to creating a welcoming Town Centre for both the local communities and visitors.

4.0 Departments, Agencies and Organisations with a role regards to Tourism

4.1 The Department of Enterprise, Trade and Investment for Northern Ireland (DETI) is the key player who play a significant role in formulating and delivering economic development policy in terms of tourism in Northern Ireland. DETI act as the host Department for Tourism Northern Ireland (Tourism NI is the trading name of the Northern Ireland Tourist Board-NITB). All of these organisations can contribute to the development of tourism in different ways. The importance of tourism is acknowledged by DETI, who recognise that Northern Ireland has not been as successful as competitor destinations and it has work to do to develop the potential of business tourism.

4.2 In relation to Mid Ulster Tourism NI focuses ultimately on the two major natural assets of “Tyrone and the Sperrins” and “Lough Neagh and its Waterways”. Both of these regions are two of nine destinations as identified in the Draft Tourism Strategy for Northern Ireland 2010 to 2020 (TSNI) which are considered as key areas for attracting visitors.

4.3 A Draft Tourism Strategy for Northern Ireland to 2020 (DETI):

This provides the strategic direction and targets for Northern Ireland tourism and sets out a range of priorities which fall under four key themes – People, Product and Places, Promotion and Partnership. The aim is to provide a vision for the development of Northern Ireland’s tourism experience to the year 2020 and an action plan to deliver it. At the core of the strategy is the intention to grow income from visitor numbers.

Destination Development:

As part of the delivery of the draft strategy, Tourism NI aims to support tourism stakeholders in local regions throughout Northern Ireland in the production and delivery of “Destination Development Plans”. The draft Tourism Strategy for Northern Ireland to 2020 identifies nine key destinations, two of which are applicable to the Mid Ulster Area:

- Tyrone & Sperrins
- Lough Neagh and its Waterways

4.4 Each of these destinations have Management Plans. The Tyrone and Sperrins Tourism Destination Management Plan (Draft released July 2013) identifies the regions underperformance in the Tourism Sector and aims to promote the region as a natural outdoors environment where ancient landscape, adventure and culture can be enjoyed and thereby contribute to the tourism industry. The Lough Neagh and its Waterways Destination Management Plan is in progress and aims to advance the tourism product within the destination area and will be a blueprint to drive the tourism experience in the region. The Lough Neagh Partnership, lead body in this destination, aims to ensure that the tourism and

leisure potential of the Lough is maximised. Lough Neagh's main tourism strength lies in its diversity of water based sports and activities which is a focal point for tourism in the area. These plans promote the Mid Ulster area however there is little identified in the NI Tourist Board Corporate Plan 2011-15 for Mid Ulster.

- 4.5** Other Government Departments have an important role in Tourism Development. The Department of Agriculture and Rural Development (DARD) 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.
- 4.6** 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 the maintenance of open access to forests for both recreational and tourism purposes. Forestry Areas within Mid Ulster include Davagh Forest and Favour Royal which are used for a range of purposes including Camping and Outdoor Recreational Activities.
- 4.7** DARD 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 the North of 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 considerable lower in NI than is the case for England where, using a similar definition, about 18% of farms were found to have some diversified activity in 2010.
 - 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.
- 4.8** The Department of the Environment (DoE) hold responsibility for Departmental Agencies including the Northern Ireland Environment Agency (NIEA) and have a role to play in regards tourism development given their role in the protection of our monuments and built heritage which are important tourist assets.
- 4.9** The DoE supports Outdoor Recreation NI, an umbrella organisation for Walk NI, Mountain Bike NI, Cycle 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.

Tourism Project Example Mid Ulster – “Windmill Wood Project”:

Windmill Wood is a mature woodland on the outskirts of Dungannon. Outdoor Recreation NI was successful in securing funding to complete a trail design for the area from the NIEL Challenge Fund 2014-15. The trail design was due for completion in March 2015 and includes up to 3kms of multi-use walking and family cycling trails for use by the local community and visitors from wider afield.

4.10 The DoE’s Northern Ireland Biodiversity Strategy (NIBS) 2005 – 2009, sets 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 its setting and impact upon 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”.

Findings in the 2005 – 2009 NIBS indicate that the recommendations have not been fully implemented despite some local initiatives. However, the Lough Neagh Advisory Committee, with support from the Lough Neagh Partnership have implemented the second above recommendation in their area.

4.11 The Lough Neagh Advisory Committee, in conjunction with DoE, published the Lough Neagh Management Strategy in June 2002 and recommends 29 objectives to ensure the co-ordinated management and sustainable development of the Lough Neagh Wetlands. In terms of tourism, it is felt that if the recommended objectives are implemented, the area will subsequently become more attractive in tourism terms which will in turn have a beneficial effect on the local economy. The document recommends a balanced approach to ensure that the environmental impact is alleviated through stringent monitoring and management techniques.

4.12 The Department of Culture, Arts and Leisure (DCAL) is 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. The Mid Ulster Area benefits from facilities such as The Burnavon Centre in Cookstown, which has a dedicated Visitor Centre providing information about opportunities to explore the heritage and culture of the region and wider afield. The Centre also provides stage productions and arts events, all of which generate visitor numbers to the region.

Art Council of Northern Ireland “Ambitions for the Arts”: A Five Year Strategic Plan for the Arts in Northern Ireland 2013-2018 (DCAL):

This document sets out key values and principles on which the Arts Council will base its activities until 2018.

One of the Ambitions as laid out in the document is “To Build Partnerships”. In terms of the benefits to the Tourism Sector, the Arts Council works in partnership with the NITB to enhance the ability to generate interest in “Cultural Tourism”. The Strategy makes the Aim of undertaking an economic appraisal for the viability of creating a dedicated gallery for Northern Ireland.

4.13 The Department for Social Development, DSD has strategic responsibility for, amongst other roles, urban regeneration and community and voluntary sector development. The Regional Development Office, a Department within DSD, 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 Reinvigoration - including Comprehensive Development Schemes and Environmental Improvement Schemes outside Belfast & the North West; and
- Lands Service, which oversees the sale of New Towns land and management of the Interim Estate.

4.14 The Department for Employment and Learning, DEL 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.

4.15 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. The document sets out an action plan to increase skills and training related to tourism employment within Northern Ireland.

4.16 The Department of Finance and Personnel, DFP, prioritise the use of resources available to Northern Ireland, to ensure that these are used efficiently and secure the reform and modernisation of public services. DFP are responsible for overseeing grants by the European Sustainable Competitiveness Programme and the European Social Fund Programme which aim to strengthen competitiveness and attractiveness, as well as employment. DFP have been involved, through funding allocations, in the following projects in the Mid Ulster Area:

- Lough Neagh Partnership- part funded by the DFPNI managed Programme for Building Sustainable Prosperity (BSP) grant. In 2003 the Partnership received a funding package of £3.2m under the Programme for Building

Sustainable Prosperity (BSP) for a major regeneration initiative for the entire Lough Neagh area. The Partnership has since allocated all of its funding to projects around the Lough and is now focussing on the promotion and marketing of these projects and the whole of the Lough Neagh wetlands area. The partnership continues to prioritise, amongst other issues affecting the area, the development of a major heritage programme and marketing & promotion of the Lough.

- Natural Resource Rural Tourism Initiative (NRRTI): In 2003 the tourism industry in the Sperrins region received a grant of some £3.4 million from the EU PEACE II programme for Peace and Reconciliation. The main aim of NRRTI was to put in place, within 5 years, some of the tourism infrastructure that would have developed over the last 30 years in the absence of the political unrest and violence which Northern Ireland experienced and which has resulted in the tourism potential of Northern Ireland's natural resources remaining largely untapped.

4.17 Given the changeover to 11 supercouncils following the Review of Public Administration, each Council Area is now currently involved with formulating a new Area Plan for their respective area, under Part 2 (8) and (9) of the 2011 Planning Act. The new Area Plans will therefore impact upon tourism development in the specific District Council areas.

4.18 The Western Regional Tourism Partnership, covering the counties of Fermanagh, Londonderry, Tyrone and the geographical area of the Sperrin Mountains the Western Regional Tourism Partnership (WRTP) seeks to promote the West of Northern Ireland to visitors from both home and abroad. It also works to develop a unified tourism strategy for the region, whilst also taking into account the needs of its constituent bodies. The organisation was formed in 2006 and consists of representatives from the 7 Councils in the West of Northern Ireland, Cookstown, City of Londonderry, Dungannon, Fermanagh, Magherafelt, Omagh and Strabane and from the constituent tourism bodies for the region, Derry City Visitor and Convention Bureau, Fermanagh Lakelands Tourism, Sperrins Tourism and Flavour of Tyrone.

4.19 Dungannon Regeneration Partnership (DRP) was set up and funded by Dungannon and South Tyrone Borough Council to encourage and promote the regeneration, development and prosperity of Dungannon town. The Partnership, which was set up by the council in 2000 which comprises of representatives from the public, private and community/voluntary sectors with a remit to encourage the regeneration, development and prosperity of Dungannon town. Since the launch of the Dungannon Regeneration Strategy in 2002, DRP in conjunction with the council has been actively rolling out a number of initiatives and projects at furthering the social and economic and physical regeneration of the town.

4.20 The Town Twinning initiative is funded by the "Europe for Citizens" program and supports the coming together of two European communities with the aim of facing their problems and developing between themselves closer and closer ties of friendship. Cookstown has been officially linked with Plerin Sur Mer in Brittany, France since 1995. During this time the relationship between the two

towns has strengthened and grown through frequent dialogue and regular exchange visits. Participants in these exchanges have included representatives from the areas of sport, the arts and in particular education.

Between January and August 2005, Cookstown Tourist Information Centre registered 6,342 enquiries, an increase of 1,120 from the same period in 2004. With the tenth anniversary of the twinning committee, a lot of French groups came to Cookstown which accounted for 2 per cent of the enquiries made that year.

4.21 There are various Development Associations and Regeneration Groups in Mid Ulster District which will have a role to play in regards tourism development. It is important that these associations and groups are consulted and are therefore included within the draft Statement of Community Involvement Paper (SCI) which will be presented to the Mid Ulster Planning committee in June 2015.

4.22 The National Trust is a conservation organisation with charitable status which works to preserve and protect historic places and spaces in the public interest. The trust owns many heritage properties, including historic houses and gardens, industrial monuments and social history sites. It is one of the largest landowners in the United Kingdom, owning many beauty spots, most of which are open to the public free of charge.

In the Mid Ulster Area, there are three National Trust held assets, including;

- The Argory: Argory estate and mansion, woods and walks along the River Blackwater.
- Springhill: Springhill House and estate, coach yard and grounds.
- Wellbrook Beetling Mill: The last working water-powered linen beetling mill with associated grounds and walks.

5.0 Northern Ireland and Mid Ulster Tourism Industry

Key assets and tourism resources

5.1 The potential to attract tourism and to sustain interest and investment in this field has been historically based on a mixture of both private and public interests and investment. In line with strategic thinking on the matter, Natural and Built Heritage resources are often deemed to be the key players in the ability to generate and attract tourism and associated revenue. This approach is seen not just in the Mid Ulster Area, but wider afield as a sustainable basis from which tourism and tourism growth should be founded; however it is not the only basis from which tourism attraction is founded. Key segments in the industry also include the ability to attract visitors through the hosting of events and through the activities available in the area.

5.2 According to the NI Tourism Strategy 2020, Northern Ireland will double the income earned from tourism by 2020 by:

- increasing visitors from 3.2 million to 4.5 million by 2020;
- increasing earnings from tourism from £536 million to £1 billion by 2020;
- Progressively accelerating spend by visitors

- targeting specific markets and market segments;
- supporting indigenous high quality businesses to grow; and
- being visitor inspired in all our actions.

The ability to achieve such aims is through supporting the key segments of the tourist industry in its different forms.

- 5.3** The promotion and marketing of tourism in Mid Ulster has principally been the responsibility of the individual borough councils of Magherafelt, Cookstown and Dungannon/South Tyrone, which have now amalgamated into the Mid Ulster Council we have today. The amalgamation of the three areas now presents a new opportunity to pool together the key resources enjoyed by all three and move forward with a wider based, more collaborative approach.
- 5.4** In addition to the Council, other public agencies, such as Department of Agriculture and Rural Development, Forest Service, Department of Environment and NIEA, have cooperated to open up historic and specialist interest sites to the public as well as walks and caravan/camping facilities. Most tourism accommodation, such as hotels and self-catering chalets, are provided by the private sector which also contribute to the provision of other tourism and associated facilities such as restaurants, cafes and craft shops. Appendix one at the end of this Paper outlines in greater detail the various attractions available throughout the Mid Ulster Area.

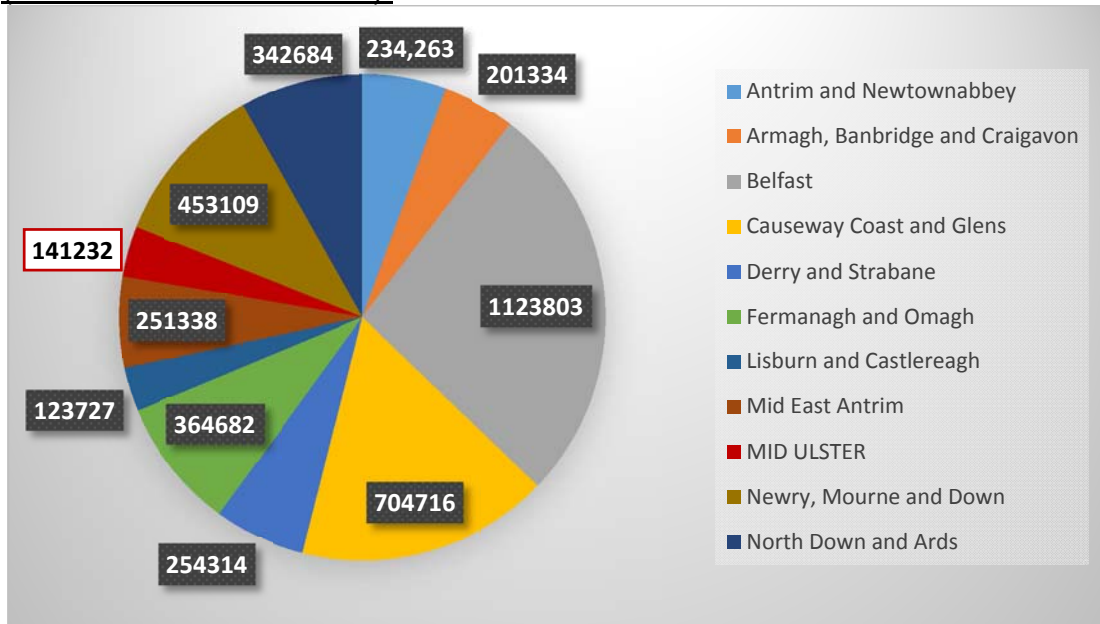
Mid Ulster Tourism Statistics and Performance

Overnight Trips

- 5.5** According to statistics as released under the Local Government District Tourism Statistics Northern Ireland 2013, the Mid Ulster region had the second lowest number of Overnight Trips secured in 2013 (the lowest being in Lisburn and Castlereagh District). The Mid Ulster region also had the second lowest Expenditure on Overnight trips of all the Local Government Districts in Northern Ireland (the lowest being in the Armagh, Banbridge and Craigavon District, despite its ranking as third lowest in terms of overnight trips secured). The latest Local Government District Tourism Statistics 2013 for Northern Ireland were published on 27 November 2014 by NISRA.

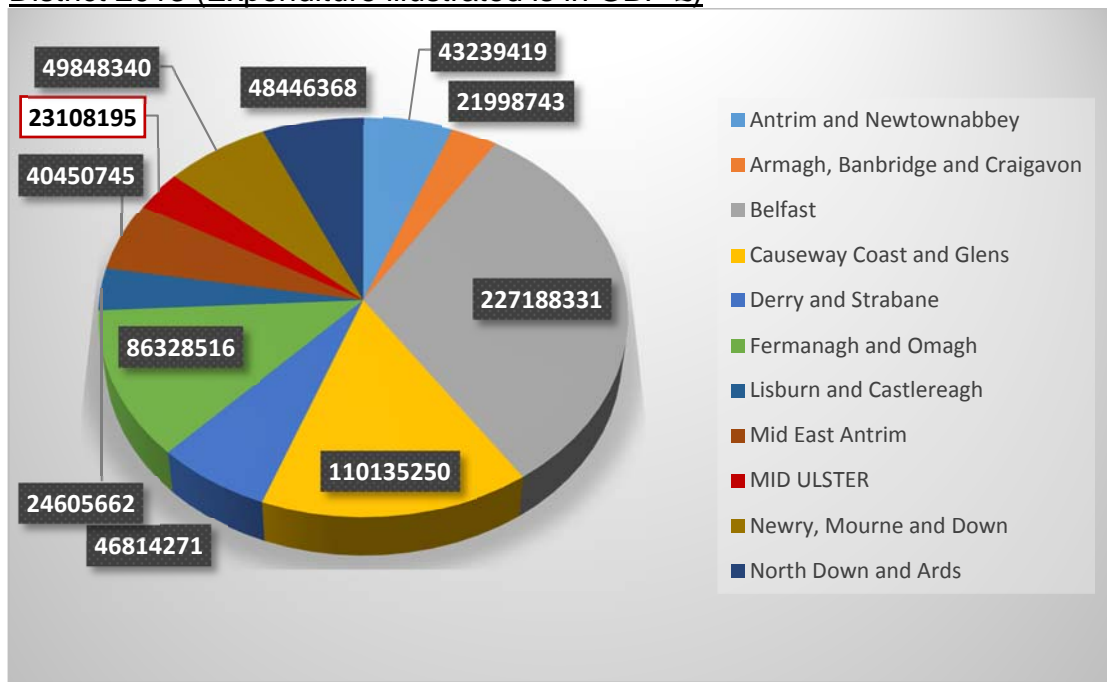
N.B: Headline tourism statistics are measured using standard UN definitions. The UN use the concept of “overnighting”. This is broadly defined as staying away from your usual place of residence for one night or more. This does not need to be for holiday, it can also relate to visiting relatives, business etc. As well as including overnights of visitors to Northern Ireland it also includes overnights of local residents within Northern Ireland. Note overnights excludes day trips, which will be a significant part of the local tourism market.

Figure 1: Estimated Overnight Trips by Local Government District 2011 - 2013 (statistics source – NISRA).



* Source: Local Government District Tourism Statistics 2013, NIRSA.

Figure 2: Estimated Expenditure on Overnight Trips by Local Government District 2013 (Expenditure illustrated is in GBP £)



* Source: Local Government District Tourism Statistics 2013, NIRSA.

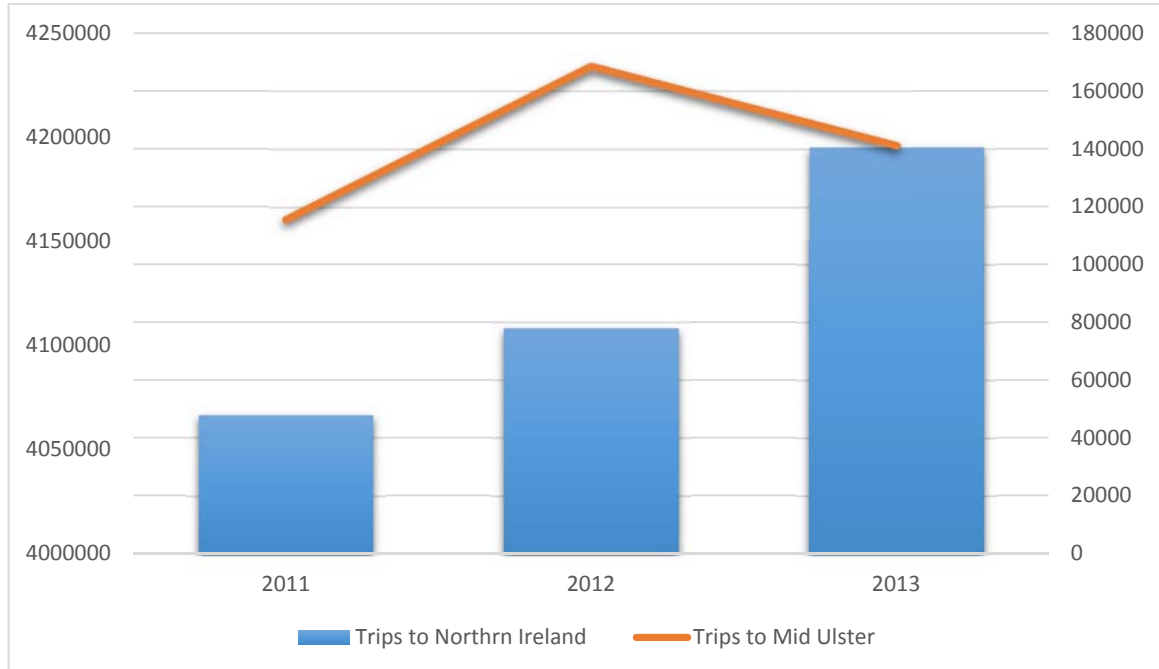
Figure 3: The overall share of Mid Ulster District in Northern Ireland Tourism Market compared to Northern Ireland Average, 2013.

Area	Overnight Trips	Trips %	Expenditure (£)	Expenditure %
NI Total	4,195,200	100	£72,164,563	100
Mid Ulster Area	141,232	3	£23,108,917	3

* Source: Local Government District Tourism Statistics 2013, NIRSA.

5.6 The latest available tourism statistics range for the years 2011, 2012 and 2013 indicate that overall, Northern Ireland has experienced an overall increase in overnight trips secured year on year; however, by way of contrast, the Mid Ulster region has experienced a mixed reaction, with trips increasing in 2012 before declining again in 2013.

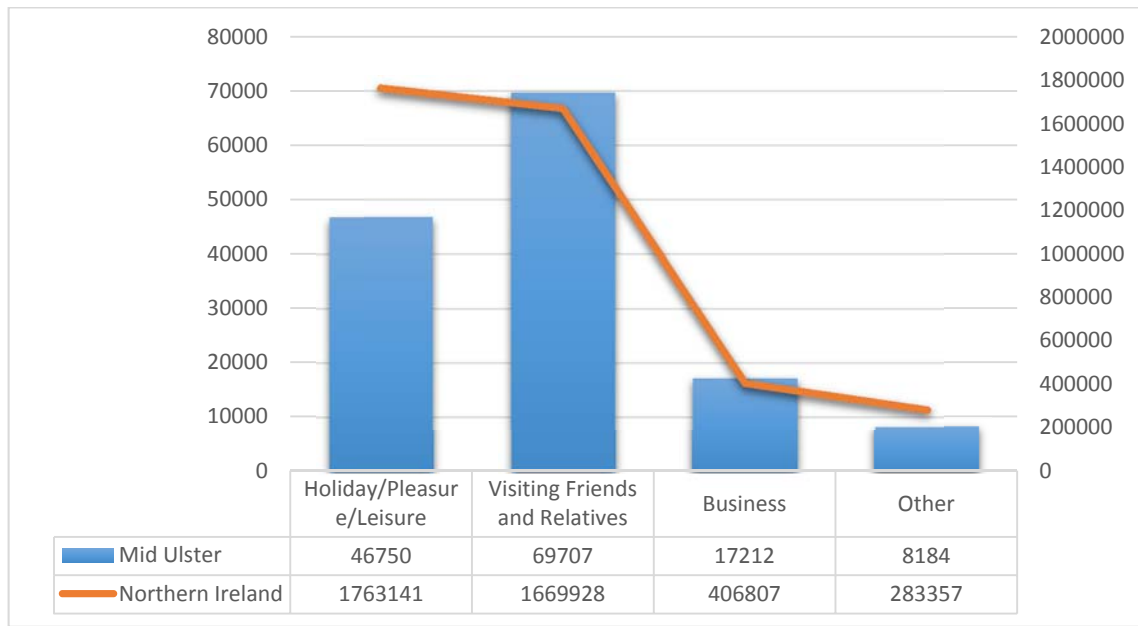
Figure 4: Estimated number of Overnight trips for years 2011, 2012 and 2013 to Northern Ireland and by comparison to Mid Ulster.



* Source: Local Government District Tourism Statistics 2013, NIRSA.

5.7 As shown in Figure 1, Mid Ulster secured the second lowest number of Overnight Trips compared to other Local Government Districts in Northern Ireland for the year 2013. The following chart shows the reasons behind why those visitors made the decision to stay overnight in Mid Ulster.

Figure 5: Estimated number of Overnight trips and reasons for visiting in Mid Ulster 2011 – 2013.



* Source: Local Government District Tourism Statistics 2013, NIRSA.

5.8 According to these statistics, the top reason for an overnight trip in the Mid Ulster District was due to tourists visiting friends or relatives. 49% of people visiting Mid Ulster between 2011 and 2013 came to stay for this reason. This was above the Northern Ireland average of 41%. The second biggest reason for visiting was for Holiday and Leisure Purposes at 33%, but this fell short of the Northern Ireland average for this reasoning, which illustrated a 43% average or overnight trips were for this purpose.

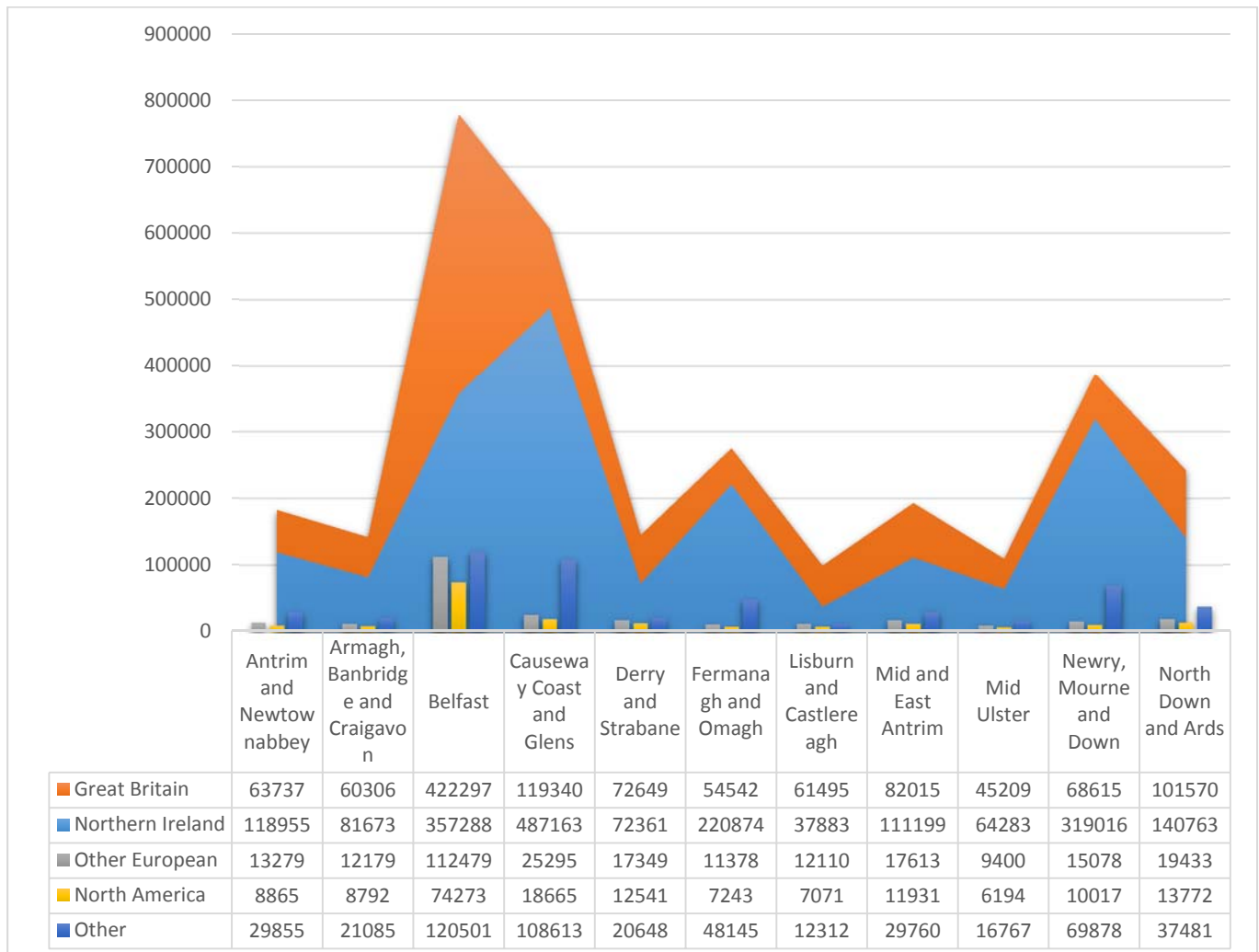
5.9 It is important to note that of all the council regions across Northern Ireland, in terms of percentages, Mid Ulster procures the third highest percentage of visits for the purposes of business across the province at 12%, only being outperformed by Belfast (17%) and L’Derry/Strabane (16%). The Northern Ireland average for overnight trips for business purposes totalled at 10% on average. So, although overall only 17212 in total overnight trips to Mid Ulster were for made for “Business Purposes” (which equates to 4% of the Northern Ireland Average for this time period), it did equate to 12% of the *reasoning* for people staying in Mid Ulster, the third highest draw across the board.

Figure 6: Table to show Estimated Average Overnight Trips in Northern Ireland by Reason for Visit and Local Government District 2011 – 2013.

	Holiday/Pleasure/Leisure			Visiting Friends and Relatives (VFR)			Business			Other			All		
	n	%	LGD	n	%	LGD	n	%	LGD	n	%	LGD	n	%	LGD
Antrim and Newtownabbey	64,212	4%	27%	130,358	8%	56%	20,496	5%	9%	19,625	7%	8%	234,691	6%	100%
Armagh, Banbridge and Craigavon	33,432	2%	18%	114,563	7%	62%	21,103	5%	11%	14,937	5%	8%	184,035	4%	100%
Belfast	425,481	24%	39%	394,096	24%	36%	188,186	46%	17%	79,076	28%	7%	1,086,839	26%	100%
Causeway Coast and Glens	441,373	25%	58%	228,127	14%	30%	32,105	8%	4%	57,472	20%	8%	759,076	18%	100%
Derry and Strabane	63,540	4%	32%	91,083	5%	47%	31,203	8%	16%	9,721	3%	5%	195,548	5%	100%
Fermanagh and Omagh	170,217	10%	50%	138,008	8%	40%	21,383	5%	6%	12,573	4%	4%	342,180	8%	100%
Lisburn and Castlereagh	41,132	2%	31%	71,734	4%	55%	12,519	3%	10%	5,485	2%	4%	130,871	3%	100%
Mid and East Antrim	99,296	6%	39%	122,475	7%	49%	20,172	5%	8%	10,575	4%	4%	252,517	6%	100%
Mid Ulster	46,750	3%	33%	69,707	4%	49%	17,212	4%	12%	8,184	3%	6%	141,853	3%	100%
Newry, Mourne and Down	266,168	15%	55%	148,795	9%	31%	21,931	5%	5%	45,711	16%	9%	482,604	12%	100%
North Down and Ards	111,540	6%	36%	160,983	10%	51%	20,498	5%	7%	19,998	7%	6%	313,018	8%	100%
Northern Ireland	1,763,141	100%	43%	1,669,928	100%	41%	406,807	100%	10%	283,357	100%	7%	4,123,232	100%	100%

* Source: Local Government District Tourism Statistics 2013, NIRSA.

Figure 7: Table to show Estimated Average Overnight Trips in Northern Ireland by Place of Origin and Local Government District 2011 – 2013.

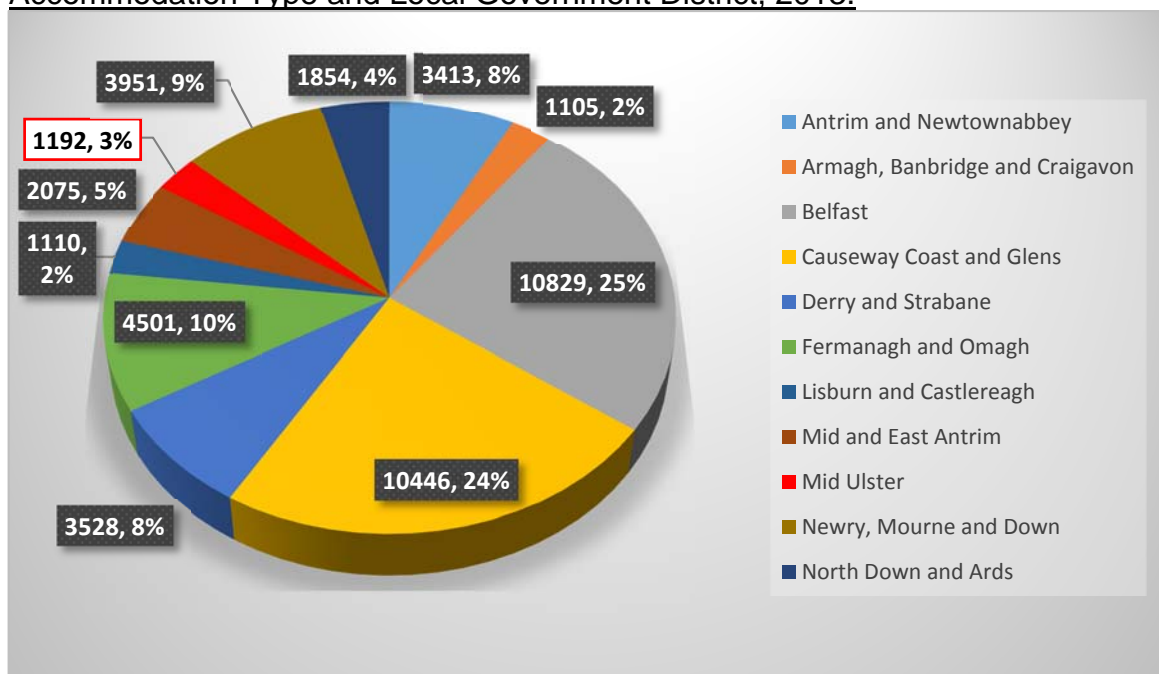


* Source: Local Government District Tourism Statistics 2013, NIRSA.

5.10 According to statistics as indicated in the chart above, the vast majority of overnight trips within Northern Ireland are made by domestic tourists (49%). This figure is similar to Mid Ulster where 45% of overnight trips were made by domestic tourists. Statistically, Mid Ulster had a larger percentage share of overnight visitors from Great Britain (32% as opposed to NI average of 28%) and Europe (7% as opposed to NI average of 6%). Other areas such as North America were on a par with the NI average in terms of percentage share. The statistics appear to illustrate a direct correlation between the fact that the majority of visitors to Mid Ulster are there to visit friends and relatives – the reason that less domestic tourists stay in Mid Ulster is likely due to the fact that Mid Ulster is so strategically placed that many people can simply return home again rather than pay to stay over, whereas visitors from Great Britain or Europe likely stay for longer due to the travel distance.

5.11 In terms of accommodation, Mid Ulster has the second lowest number of hotel bed spaces and the third lowest number of Guesthouse/Guest Accommodation/Bed and Breakfast bed spaces of all the Local Government Districts. There are a number of hotels in the area located on large sites and which have the potential to continue to provide important bed spaces e.g. Glenavon Hotel and Greenvale Hotel in Cookstown. The pressure of the housing development boom is an example of when hotels like this on key large sites within the urban can come under pressure to be re-developed for housing development e.g. the Inn on the Park in Dungannon.

Figure 8: Number of Beds available in Licensed Accommodation by Accommodation Type and Local Government District, 2013.



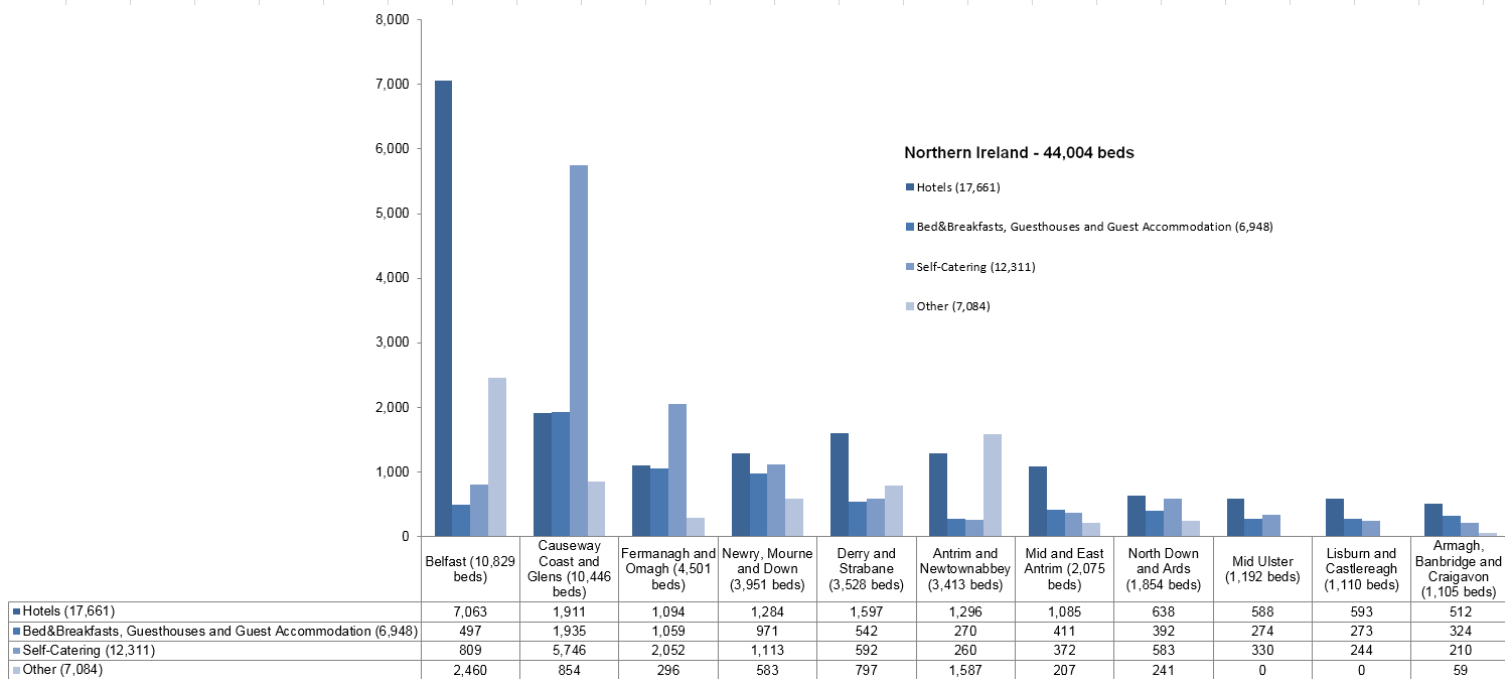
* Source: Local Government District Tourism Statistics 2013, NIRSA.

Figure 9: Table to show accommodation by Local Government District, 2011 - 2013.

2013	Hotels			Guesthouses			Bed&Breakfasts			Guest Accommodation			Self-Catering			Hostel			Bunkhouse			Campus			All			
	Number	Rooms	Beds	Number	Rooms	Beds	Number	Rooms	Beds	Number	Rooms	Beds	Number	Units	Rooms	Beds	Number	Rooms	Beds	Number	Rooms	Beds	Number	Rooms	Beds	Number	Rooms	Beds
Antrim and Newtownabbey	10	632	1,296	6	40	94	27	83	176	0	0	0	16	63	141	260	0	0	0	0	0	0	2	1,539	1,587	61	2,435	3,413
Armagh, Banbridge and Craigavon	7	204	512	5	26	57	32	110	256	2	4	11	27	42	105	210	1	18	59	0	0	0	0	0	0	74	467	1,105
Belfast	32	3,391	7,063	9	71	141	18	88	182	3	87	174	69	190	431	809	8	118	512	0	0	0	5	1,897	1,948	144	6,083	10,829
Causeway Coast and Glens	19	708	1,911	20	203	484	172	621	1,449	1	1	2	719	1,000	3,061	5,746	12	106	450	1	2	12	2	369	392	946	5,061	10,446
Derry and Strabane	11	659	1,597	5	38	93	57	167	441	2	4	8	65	119	269	592	7	43	227	0	0	0	1	566	570	148	1,776	3,528
Fermanagh and Omagh	13	464	1,094	17	122	288	68	212	485	2	109	285	179	352	971	2,052	5	63	256	0	0	0	1	20	40	285	1,961	4,501
Lisburn and Castlereagh	4	255	593	3	26	59	24	75	163	5	23	51	29	55	119	244	0	0	0	0	0	0	0	0	0	65	498	1,110
Mid and East Antrim	13	493	1,085	6	49	112	48	130	299	0	0	0	51	82	194	372	1	9	51	1	7	16	1	131	140	121	1,013	2,075
Mid Ulster	9	238	588	10	63	139	22	58	135	0	0	0	42	61	153	330	0	0	0	0	0	0	0	0	0	83	512	1,192
Newry, Mourne and Down	12	538	1,284	18	143	330	73	239	527	5	52	114	145	222	554	1,113	9	87	569	1	3	14	0	0	0	263	1,616	3,951
North Down and Ards	8	311	638	7	56	123	40	122	263	2	3	6	95	124	293	583	3	53	199	0	0	0	1	18	42	156	856	1,854
Northern Ireland	138	7,893	17,661	106	837	1,920	581	1,925	4,376	22	283	652	1,437	2,310	6,311	12,311	46	497	2,323	3	12	42	13	4,520	4,719	2,346	22,278	44,004

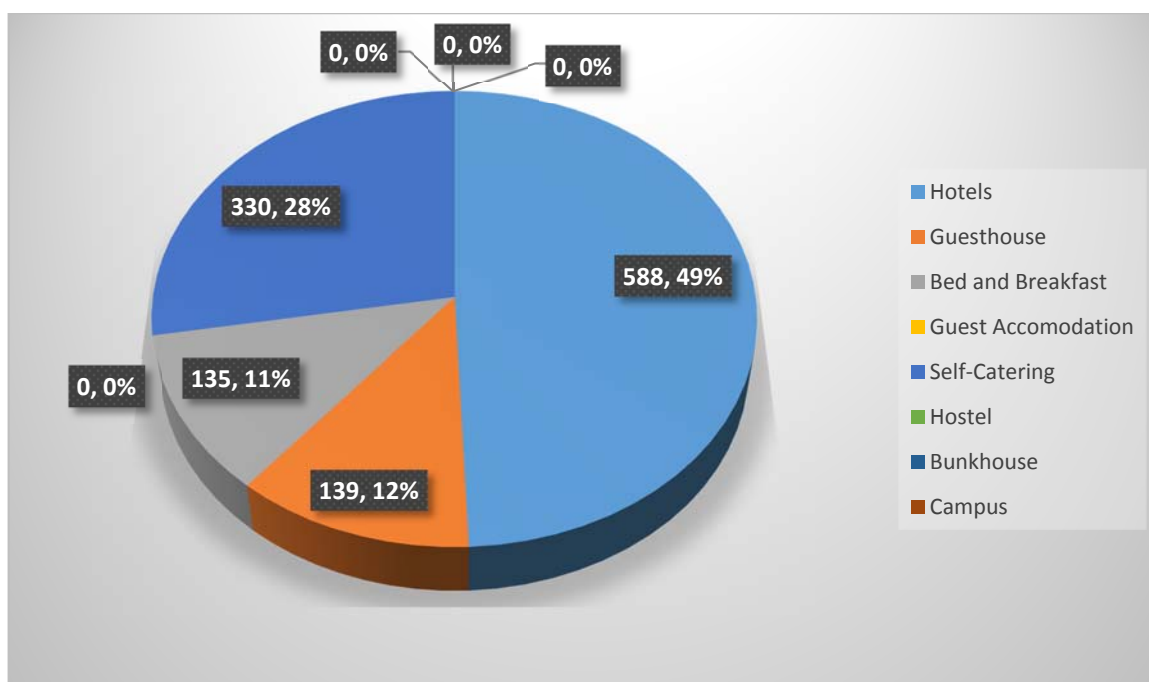
* Source: Local Government District Tourism Statistics 2013, NIRSA.

Figure 10: Number of beds available by accommodation type and Local Government District 2013.



* Source: Local Government District Tourism Statistics 2013, NIRSA.

Figure 11: Mid Ulster Accommodation Stock (Bed no's) by venue type 2013



* Source: Local Government District Tourism Statistics 2013, NIRSA.

Figure 12: Certified hotel, self-catering, guesthouse and bed & breakfast stock by Mid Ulster region, 2013.

Area (Including Former District)	Premises (No.)	%	Room (No.)	%	Bed-Spaces (No.)	%
NI Total	2346	100	17757	100	39282	100
Cookstown	26	1	166	<1	395	1
Dungannon	34	2	234	1	516	1
Magherafelt	25	2	115	<1	289	<1

* Source: Northern Ireland Tourist board Statistics C/O NISRA Tourism Statistics for Local Government Areas, 2013.

Activity Tourism

5.12 The Strategic Framework for Action 2004-07 charted the way forward for tourism, identifying five signature projects and winning themes. Activity Tourism was one of the five winning themes as identified in this document and its importance is reiterated within the successive document, The Northern Ireland Tourism Strategy 2020, where Activity Tourism it is identified as a key target market.

What is Activity Tourism and what forms are available in Mid Ulster?

- 5.13 Activity Tourism covers a range of spheres from “active” holidays involving canoeing, climbing, horse-riding and mountaineering, to the less physical, yet still activity-focused areas of nature watching, food trails, or local culture and heritage trails. DETI and NITB identify Activity and Special interest breaks as a key target market worthy of support in Northern Ireland. Activities include golf, angling, walking, gardens, cruising and cycling amongst others.
- 5.14 Activities tourism figures are not available for NI, but Fáilte Ireland estimated that activity tourists spend 33% more than the average tourist. Based on this, it is estimated that the activities tourism market in NI is worth £55 million in overseas tourist spending. This equates to approximately 16% of overseas tourist spending in NI in 2009. Combined with the RoI and domestic market, the whole market could be worth as much as £90 to £100 million per annum in revenue for NI tourist businesses (Statistics Source: “Activities Tourism – Sharing Success” published by NITB 2011).

Angling

- 5.15 Angling represents a key product to deliver growth and competitiveness for tourism in Northern Ireland and Mid Ulster. Angling is the 6th biggest sport in the UK (source: “The Social and Economic Impact to Northern Ireland, and areas within the Loughs Agency, of Recreational Fisheries, Angling and Angling Resources Report” by PWC as commissioned by DCAL) however by its very nature it is not as readily visible within the public domain as many other activities, such as walking or cycling. There is evidence that angling has the potential to generate economic benefits, particularly in rural areas where job opportunities are limited. Evidence shows that the visiting angler is as valuable to the economy as a visiting golfer, walker, cyclist or horse-rider and all these groups spend more than the average ‘non sporting’ visitor. Based on the number of licences issued, the number of visiting anglers from outside Northern Ireland appears to be slowly increasing (source: “A Strategic Review of Angling in Northern Ireland” published by DCAL in July 2013).
- 5.16 Given its location directly alongside Lough Neagh and its tributaries, Mid Ulster is strategically placed in a prime position to avail of the tourism opportunities angling can bring. Currently, it is possible to obtain boat hire and fishing permits from Ballyronan Marina. Course Fishing is available at Tullygiven Lough, Carrick Lough and Creeve Lough whereas Game Fishing is available at White Lough near Aughnacloy; however all fishing relies on riparian owners (those who own the land bordering a lake or river) to provide access to fisheries.

The main beneficiaries of increased angling tourism in the Mid Ulster area 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.

Canoeing and water sports:

- 5.17 The Mintel UK report ‘Activity Holidays -UK - February 2010’ finds that for canoeing, 16 to 24 year olds were the key age group for participation among

both domestic and RoI tourists to NI. There was very little participation outside of this group and little to no participation of anyone over the age of 49. What was different about canoeing to other activities was in terms of gender participation rates. In terms of dedicated canoeing breaks in NI, women were almost as likely to participate as men. However in terms of participation as part of a wider holiday, men were much more likely to participate than women. This suggests that those with a keen interest in canoeing are relatively evenly split across men and women. The Minstrel guide also indicates that in terms of Activity Types, Canoeing was statically the least popular activity type for both domestic tourists and tourists from the Republic of Ireland to Northern Ireland.

Figure 13: Domestic visitor participation in activities by activity type, Northern Ireland 2009.

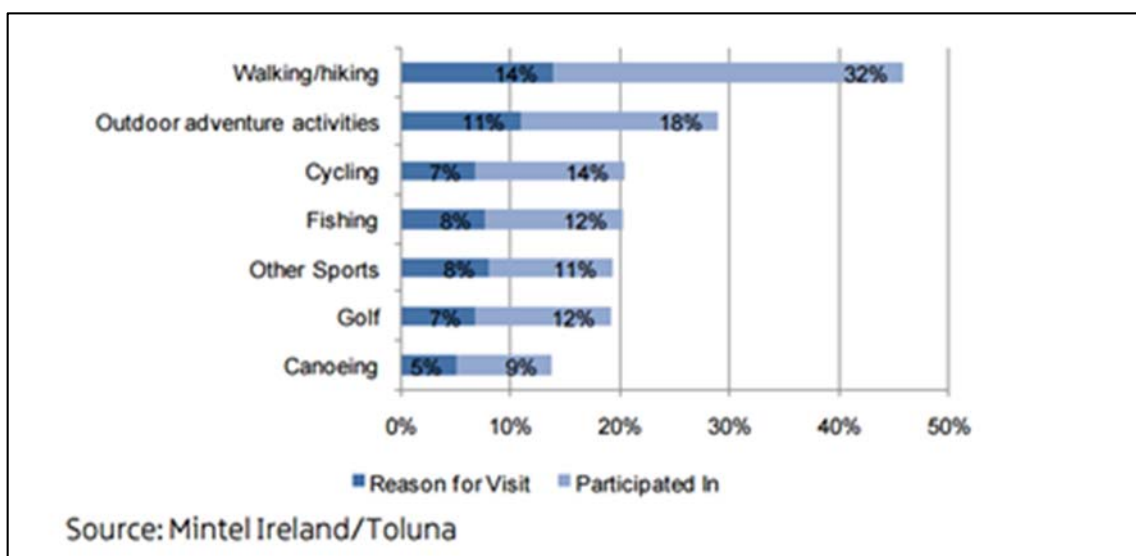
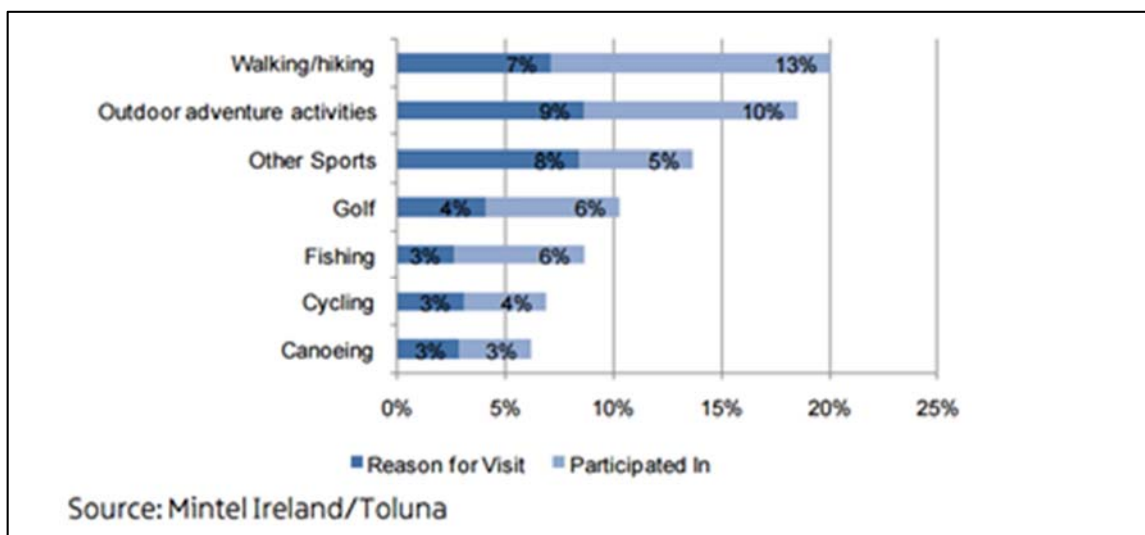


Figure 14: RoI visitor participation in activities by activity type 2009.



- 5.18** There are nine recognised Canoe Trails in Northern Ireland, two of which are directly accessible via the Mid Ulster Area; the “River Blackwater Canoe Trail” and “Lough Neagh Canoe Trail”. The River Blackwater Canoe Trail has nine access points along it (canoe jetties) and progresses from Maydown Bridge, just south of Benburb, all the way to Coney Island in Lough Neagh. The vast majority of the trail progresses through the Mid Ulster District. The Lough Neagh Canoe Trail has many access points along the entire shore circumference of Lough Neagh and can be accessed via nine specific access points in Mid Ulster.
- 5.19** In terms of the wider watersports market, cruising and boat hire is a facility available via Ballyronan Marina on the shores of Lough Neagh. The Maid of Antrim pleasure cruiser can carry 100 passengers and offers several tour packages including Island BBQ trips. This facility also departs from Ballyronan Marina.
- 5.20** Lough Neagh, as the largest freshwater lake in the British Isles, is generally viewed as an underused resource in terms of its potential. According to the “Lough Neagh and its Waterways Tourism Destination Management Plan 204 – 2019” there are 4 main canals linked to the Lough. Currently, these canals are not in full public use and therefore there is no direct boating route through the whole of Northern Ireland. The four canals linked to Lough Neagh are the Ulster Canal, which ran from Charlemont on the River Blackwater to Wattle Bridge on the River Finn, South-East of Upper Lough Erne, the Lagan Canal which ran from Belfast to Lough Neagh through Lisburn. The Newry Canal, which ran from Lough Neagh via the Upper Bann to Carlingford in County Louth and the Coalisland Canal which ran from Coalisland to the River Blackwater. The canals have the potential to strategically link with the development of the Lough and there are a number of important bodies working with Councils and Government Departments to develop and restore the Canals. These include the Blackwater Partnership, The Lagan Canal Trust and the Newry Portadown and Coalisland Inland Waterways Branch.
- 5.21** It should be noted that strategically there is no cohesive strategy for inland waterway development in Northern Ireland. There is undoubtedly a long term need for an NI Inland Waterways strategy which is compatible with the Waterway Ireland strategy with Lough Neagh as its hub. If the waterways were opened up, the tourism potential of Lough Neagh would be transformed significantly. However in the short to medium term it is unlikely that any of the canals will be fully opened and for the purposes of the timescale of this tourism destination plan, priority has been given to the urgent needs of the Lough itself, with the possibility of opening up the Blackwater and Upper Bann rivers through dredging work.
- 5.22** Also within Mid Ulster is Traad Point Local Nature Reserve (LNR) which is not accessible to the general public or local community due to its derelict state and lack of access. TRAAD Point is an Area of Outstanding Natural Beauty that borders on Lough Neagh about 2km north of Ballyronan. It is a relatively flat, triangular point of land projecting into the lough, bordered on the western side by the Shore Road, and on the northern side by the Point Road. A small number

of houses and reclaimed fields occupy land adjacent to both roads. Part of the site is designated an area of special scientific interest (ASSI). The main area incorporates three buildings formerly used by the University of Ulster, School of Environmental Sciences prior to their relocating to the new science park at Coleraine.

Golf

- 5.23** The Tourism Strategy for Northern Ireland 2020 highlights the opportunity for growing golf tourism nationally and internationally to position Northern Ireland as a premier golf destination. There are currently three Golf Courses in the Mid Ulster Area, Dungannon, Cookstown and Moyola Golf Courses. Dungannon Golf Course has the particular prestige of its association with World Famous golfer, Darren Clarke, whom also advised on plans for the recent extension of the course.
- 5.24** NITB commissioned Sports Marketing Surveys Inc to undertake a Review of Golf Tourism in Northern Ireland. The results were published in 2014 and show;
- The Economic Impact of golf tourism for Northern Ireland in 2014 remaining in Northern Ireland is: £33,200,000 up from £27,000,000 in 2013.
 - The number of golfing visitors to Northern number 139,300 per annum, up from 134,268 in 2013.
 - The Economic Impact of golf tourism from non-domestic domestic golfers for Northern Ireland in 2014 is £24,600,000, up from £22,400,000 in 2013.
 - The number of non-domestic golfing visitors to Northern domestic golfing visitors to Northern Ireland is 22,293 per annum, up from 20,484 in 2013.
- 5.25** Such is the potential to obtain strong growth through this market, NITB has undertaken a study, published in December 2014 called “Strategic Review of Golf Tourism in Northern Ireland 2015 – 2020”. The Strategy Aims to, amongst other objectives, grow the value of golf visitation to Northern Ireland to £50 million per annum by 2020.

Cycling and Mountain Biking

- 5.26** Mountain biking and cycling 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 in association with mountainbikeni.com).
- 5.27** Two of Northern Irelands four National Mountain Bike Trails are located in the Mid Ulster District, Davagh Forest Trails to the North West of Cookstown, and Blessingbourne Estate Trail, which is located outside Fivemiletown.

Hill Walking and Orienteering

- 5.28** Walking is a wide reaching activity that can be suited to the most passive of participants such as those simply out for a family walk to those more keenly involved such as Orienteering Club Members. There are many forms of walking trails within Northern Ireland, including paths along Forest or Coastal trails, to recognised Ecotrail and Orienteering Walks.

5.29 The Sperrin Mountains range is the largest in Ireland and offers the best scope for hill walking in Mid Ulster. The Forestry Service of NI also offers scope for walking trails. Walk NI indicate several dedicated walking trails in the Mid Ulster Area. In Mid Ulster, there is one Ecotrail at Parkanaur Manor House however statistics indicate that Parkanaur Manor House only obtained 200 visitors in 2013 (see table below). By way of comparison, Dungannon Park, another popular walking area, obtained 224,060 visitors.

Figure 15: Visitor Attractions and their number of visitors 2011 - 2013.

		2011	2012	2013
Mid Ulster	Bellaghy Bawn	500	477.00	.
	Donaghmore Heritage Centre	.	.	89
	Drum Manor Forest Park	15,500	14,649	10,285
	Dungannon Park	125,000	142,426	224,060
	Grant Ancestral House	.	.	4,000
	Hill of the O'Neill and Ranfurly House Arts and Visitor Centre	.	.	97,873
	Parkanaur manor house	.	.	200
	Springhill House	.	14,000	23,450
	The Bog Museum, Tyrone	.	5800.00	.
	Wellbrook Beetling Mill	.	.	2,000

* Source, NISRA Local Government Tourism Statistics 2011 - 2013.

Horse-riding

5.30 Horse Riding facilities which exist in Mid Ulster are provided by the Private Sector.

Caravanning and camping

5.31 Caravanning and camping facilities in Mid Ulster are available at:
 Ballyronan Caravan Park
 Dungannon Park Caravan and Camping
 Round Lake Caravan Park Dungannon
 Clogher Valley Caravan Park.

Adventure Centres

5.32 There are two award winning Outdoor Activity Centres in the Mid Ulster Area which continue to attract many visitors, Todd's Leap outside Ballygawley and the Jungle NI between Moneymore and Magherafelt. Both are privately owned facilities and offer adventure seeking activities, corporate team building weekends and also weekends to cater for Stag and Hen parties. Relatively new activities such as Zorbing, Paintballing and Off Road Driving are available. Both facilities also offer onsite accommodation in the form of Log Cabins or "Glamping" facilities. Such facilities encompass the ability to attract visitors and retain them overnight by having both entertainment and overnight accommodation all on the same site.

Cultural Tourism

5.33 Cultural tourism is the subset of tourism concerned with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those people, their art, architecture and other elements that helped shape their way of life. The growth of cultural tourism has largely been an urban phenomenon but as culture describes everything that defines a community, it is certainly not confined there. A modern segmentation of the

opportunity would also include rural (tourism) locations and country pursuits, indigenous cultural performances and festivals, contemporary cultural tourism focused on theme parks, shopping, pop concerts, sport and film locations, participation in creative tourism programmes from crafts classes to attending a cookery school as well as heritage tourism (concerned with the 'interpretation & representation of the past') and visits to the theatre, concerts and art galleries, festivals, event and literary sites (arts tourism).

Figure 16: List of Popular Activities involving Cultural Heritage

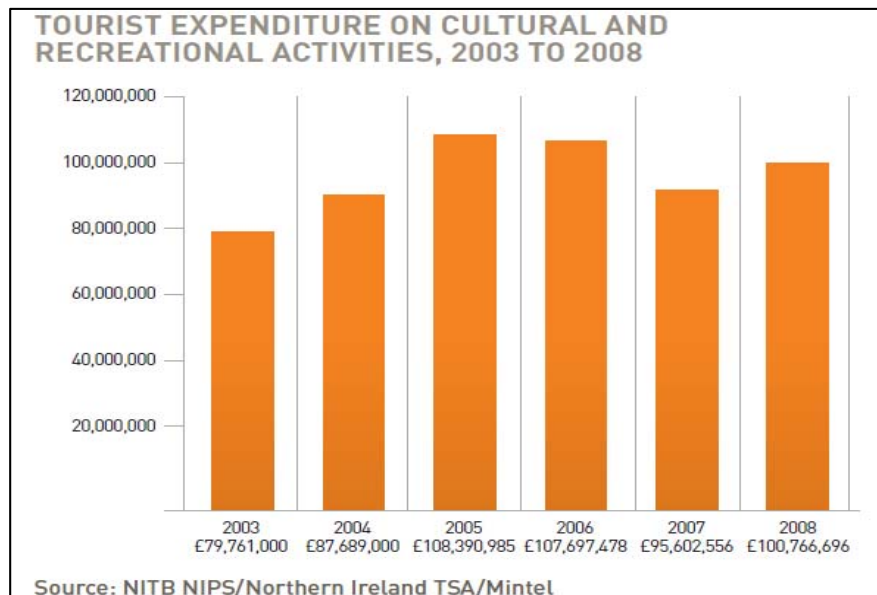
- Cultural Tourism**
- Festivals and events, banquets;
 - Music, theatre, shows;
 - Village life and rural life (e.g. farms, Sunday markets,);
 - Gastronomy, visiting/tasting local products;
 - General sightseeing, village buildings and 'atmosphere';
 - Visiting historic and religious monuments or vernacular buildings, ruins;
 - Famous people in the region.

* Source: European Commission Tourism Unit, (2003)

What forms of cultural tourism are available in Mid Ulster?

5.34 According to Mintel and NITB research, the market size for all recreational and cultural tourism in Northern Ireland was worth over £100 million in 2008. This represented an increase of 5.4% on 2007 figures.

Figure 17: Tourist expenditure on cultural and recreational activities, 2003 – 2008



Music Events

5.35 Foreign and domestic tourists now spend in excess of £100 million on cultural and recreational events in NI each year, with domestic tourists spending over

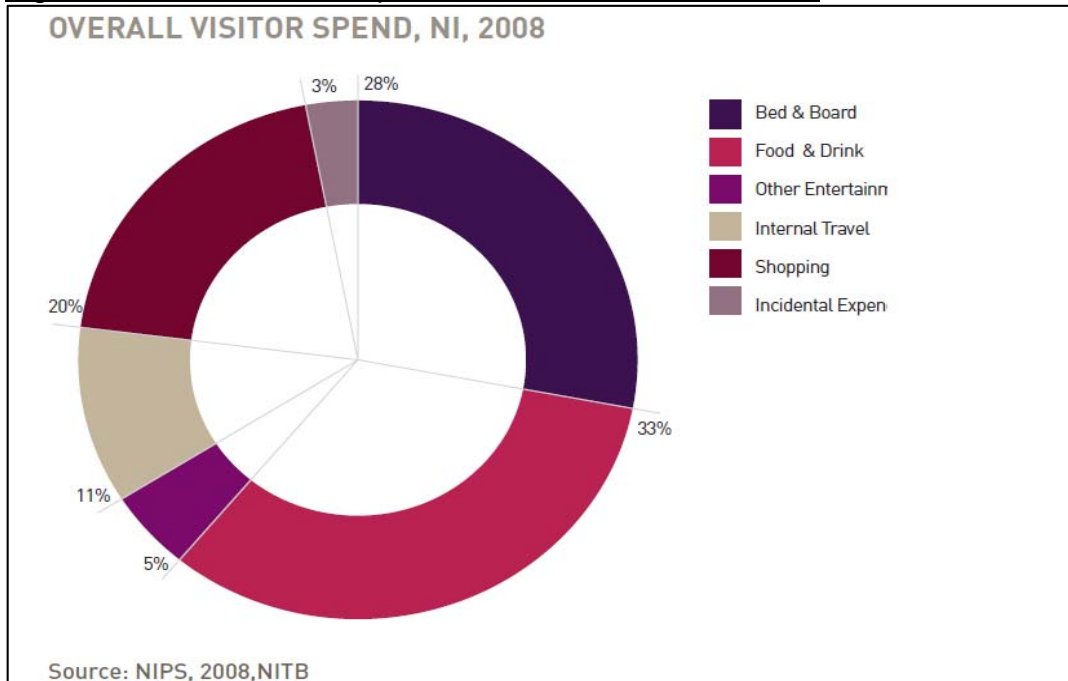
£32 million on tickets to concerts and music festivals. Though individual concerts in larger venues such as the Odyssey and Waterfront draw a significant amount of this income from gate receipts, the advent of low cost travel and lower priced tickets and accommodation in continental Europe means this sector is facing increasing competition. Music festivals, however, present a more unique proposition and draw people from further afield for longer stays in the locality, making a significant impact on the local economy.

- 5.36** According to the 2007 NITB visitor survey, 4% of tourists holiday in NI primarily to visit a concert or event. Broken down by origin, 4% of domestic tourists and 4% of ROI tourists fall under this category while 14% of GB tourists visit specifically to visit a concert or event. Percentages of tourists from Europe and the Rest of the World coming to specifically attend a concert or similar event are much lower. The numbers of tourists visiting NI for other reasons but attending a concert or festival are higher, with over 57% of visitors attending these doing so as a secondary purpose of their visit (Source: “Exploring the Music Festival Tourism Market” Published by NITB in January 2010.)
- 5.37** In Mid Ulster Glasgobury, which is held at Eagle’s Rock in Draperstown, is an example of Music Tourism. It has been running since 2000 and attracted approximately 3,000 visitors in 2009, primarily from the 18 to 25 age group and featured 47 Irish bands. (Source: “Exploring the Music Festival Tourism Market” Published by NITB in January 2010.) Due to the majority of attendees camping on site and the size and location of the festival, the impact on the local economy and particularly on local accommodation services drew revenues of approximately £90,000.

Food Tourism

- 5.38** Food is as vital a part of the tourism experience as accommodation, culture and scenery for visitors coming to experience the real Northern Ireland. In 2008, the Northern Ireland Passenger Survey (NIPS) indicated that, of the £540 million spent by overseas and domestic tourists, 33% of this was spent on food and drink, equalling £178.2 million. This was the largest spend category – (even beating accommodation!) – revealing the importance of food and drink to the visitor.

Figure 18: Overall visitor spend in Northern Ireland, 2008.



5.39 Leveraging our unique, interesting and high quality local produce based food culture is a route to growing earnings for Northern Ireland. Lough Neagh Eels have been awarded EU Protected Geographical Indication (PGI) Status which means that produce is recognised internationally for its quality and uniqueness to a region in the way that Parma Ham or Champagne is.

5.40 In Mid Ulster *Flavour of Tyrone* is an example of a local initiative. *Flavour of Tyrone* is part funded by Invest NI, Dungannon and South Tyrone Council and the private sector. The initiative aims to promote the interests of tourism providers from Tyrone at local, national and international levels and to develop tourism and hospitality throughout the region. The initiative also aims to create a network of links among the tourism providers in Tyrone so that they can encourage the exchange of ideas and work together for the benefit of all involved. *Flavour of Tyrone* is supported by EU Building Sustainable Prosperity and Department of Agriculture and Regional Development as well as the local council.

Literature, Theatre, Screen Tourism

Literature

5.41 Arguably the world’s greatest poet, the late Nobel Laureate Seamus Heaney was raised in Bellaghy and the local area formed much of the basis from which he drew inspiration for his early works. The private sector offers a small number of bespoke tours of the people, places and countryside in and around “Seamus Heaney Country” - the local area in and around South Derry which inspired this world famous poet.

5.42 Laurel Villa Townhouse in Magherafelt is Ireland's only poetry guesthouse and is the starting point for a specialist tour of Heaney Country. The tour progresses from Magherafelt to Mossbawn to retrace the footsteps of the young Seamus

Heaney on his way to school in the 1940s. Other local areas included on the tour are Castledawson, Bellaghy and “The Turf Man”, a life-size representation of Nobel Laureate Seamus Heaney's most famous poem Digging outside Bellaghy Bawn in Bellaghy. The Bawn Library also contains the Seamus Heaney Archive, an exhibit devoted to his work including a number of his manuscripts, books, his old schoolbag from his days at Anahorish Primary School and his entire catalogue of broadcasts and television work.

Theatre

5.43 Theatre is Northern Ireland's most popular art form, accounting for 60% of all ticket sales from 6,661 art form performances in Northern Ireland in 2010-11. The Arts Council of Northern Ireland 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.

5.44 In terms of Theatre productions, the main hubs of activity in the Mid Ulster area are The Burnavon Theatre in Cookstown and the Ranfurly House and Visitors Centre in Dungannon. These venue are host to various arts, drama, music, theatre and dance programs and performances as well as being a centre for Arts and Crafts workshops. Unlike other sectors of the Creative Industries, Professional Theatre and the Performing Arts, make a further economic contribution to night-time economies.

Screen

5.45 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 Northern Ireland was to a film at a cinema or other venue (58% of respondents). This position as primary method of Arts Entertainment participated in has been sustained over the past annual statistic data collections for DCAL.

5.46 There are three cinemas in the Mid Ulster Area, namely at Maghera, Cookstown and Dungannon. In addition to the established cinematic venues, Dungannon has played host to a small number of successful drive-in movie weekends in the recent past, as organised by Dungannon Film Club, a not-for-profit voluntary community organisation. The organisation was recently awarded the Film Society of the Year at the ‘Cinema For All’ awards in Sheffield in September 2014. Their events are not merely movie screenings, but celebrations of film, with comedians, designed sets, dressing-up, live music, and complimentary food and drink all adding to the experience of their nights. The events have proven very popular and continue to be a draw to the area.

Pubs and Night-Clubs

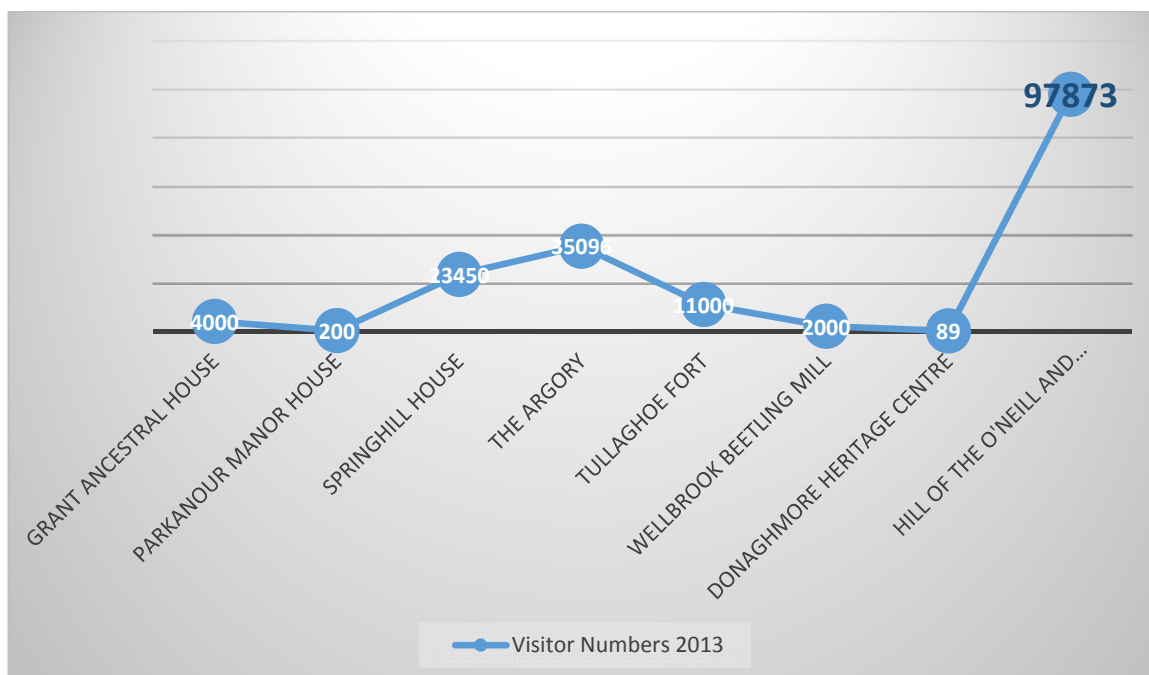
5.47 The night time economy of Mid Ulster's larger towns are largely fuelled by the popularity of pubs and nightclubs in the region. According to the NITB guide “Knowing your customer and growing your business”, the ‘Young and Lively’ market segment represents those seeking experiences that are fun and they are attracted to urban environments looking for pubs, clubs and music. Price is an important consideration as well as easy access to attractions. In terms of accommodation they often favour budget hotels and somewhere near to where everything is going on.

- 5.48** Development of the evening and night time economy in urban centres in Northern Ireland is part of the Draft Tourism Strategy for Northern Ireland to 2020. The *Purple Flag* project was initiated in Northern Ireland by Pubs of Ulster, The Department of Justice and the Association of Town Centre Management with funding support through Tourism NI's Tourism Innovation Fund, which was part-financed by the European Regional Development Fund under the European Sustainable Competitiveness programme for Northern Ireland.
- 5.49** Currently four towns and cities in Northern Ireland have achieved Purple Flag status for offering visitors a great night out - Belfast, Enniskillen, Bangor and Derry-Londonderry. These urban areas have all been recognised for showing evening visitors an entertaining, diverse and safe night out. No area within Mid-Ulster has yet been accredited with the status.
- 5.50** To achieve Purple Flag status, which is similar to the Blue Flag for beaches, 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. Purple Flag towns benefit from more visitors and lower crime and anti-social behaviour.

Built Heritage

- 5.51** Built Heritage refers to Listed Buildings, Monuments, Parklands, Gardens and Demesnes. Gardens are one of the most popular attractions in Northern Ireland. 9 out of 10 National Trusts most popular attractions were gardens.
- 5.52** The Mid-Ulster Area has a wealth of built heritage assets which are a strong incentive towards attracting outside visitors to the area. Such examples include Bellaghy Bawn in the former Magherafelt District, Beaghmore Stone Circles in the former Cookstown District and the Grant Ancestral Home in the former Dungannon/South Tyrone district, amongst others.
- 5.53** The most popular Built Heritage visitor attraction in the Mid Ulster Region in 2013 was the Hill of the O'Neill and Ranfurly House Arts and Visitor Centre. This figure is based solely on attractions who participated in the survey by returning visitor figures. Some attractions opted to keep visitor figures confidential.

Figure 19: Visitor numbers to responding heritage attractions in the Mid Ulster Area 2013.



* Source: Northern Ireland Visitor Attraction Survey (January to December 2013), NIRSA. This table excludes attractions which refrained from returning visitor numbers.

Natural Heritage:

5.54 The major natural assets of the Mid Ulster are that of Lough Neagh and its associated wetlands and the Sperrin Mountains, both of which are recognised as two of nine key destinations within Northern Ireland in the Draft Tourism Strategy for Northern Ireland to 2020 (released by the Department of Trade and Investment in February 2010). There are however a number of other sites which are also significant in terms of their natural heritage value and have specific designations registered upon them to protect their distinctive character. Many of the Natural Assets as contained within the Mid Ulster Area benefit from some form of environmental protection status. The following are of particular note;

- **Ramsar Sites:** Ramsar Sites are wetlands which are designated by the Contracting Parties for inclusion in the List of Wetlands of International Importance because they meet one or more of the Ramsar Criteria. Examples in the Mid Ulster Area include Black Bog RAMSAR and Lough Neagh RAMSAR sites in Cookstown; Ballynahone RAMSAR, Lough Neagh and Lough Beg RAMSAR in Magherafelt; and Lough Neagh and Lough Beg Ramsar and Slieve Beagh Ramsar in Dungannon/South Tyrone.
- **Special Protection Areas (SPAs):** SPAs are designated under the European Commission Directive on the Conservation of Wild Birds (The Birds Directive). Lough Neagh and Lough Beg are designated as SPAs within the area.

- Special Areas of Conservation (SACs): SACs are designated by the European Commission Directive on the Conservation of Natural Habitats and of Wild Fauna and Flora as a means of protecting some of the most seriously threatened habitats and species across Europe. Slieve Beagh, Peatlands Park, Ballynahone, Carn-Glenshane Pass, Curran Bog, Dead Island Bog, Teal Lough, Wolf Island Bog, Black Bog, Owenkillew River, Teal Lough and the Upper Ballinderry River have been designated as SACs.
- Areas of Special Scientific interest (ASSIs): ASSIs are areas of land that have been identified by scientific survey as being of the highest degree of conservation value. Examples include Ballynahone, Lough Beg, Lough Neagh, Carn-Glenshane Pass, Curran Bog, Dead Island Bog, Teal Lough and Slaghtfreeden Bog, Wolf Island Bog, Ballyknock, Ballycomb More, Crockaghole Wood, Drumbally Hill, Moneystaghan Bog, Sruhanleanantaway Burn, Toome, Slieve Beagh, Peatlands Park, Benburb, Black Lough, Cullentra Lough, Derryclooney Lough, Drumcrow Fen, Fardross Stream, Fymore Lough, Glenmore Wood, Lough Neagh, Ballysudden, Bardshessiagh, Lime Hill Farm, Little River Area, Lough Doo, Lough Neagh, Teal Lough and Slaghtfreeden Bog ASSIs.
- Nature Reserves: A nature reserve is defined as an area of importance for flora, fauna or features of geological or other special interest, which are reserved and managed for conservation and to provide special opportunities for study or research. Examples in the Mid Ulster Area include Mullenakill, Annagarraff, Brookend, Killywoolaghan, and Ballynahone and Lough Beg National Nature Reserve.

Events Tourism

- 5.55** Events Tourism is a form of tourism attraction that can drive visitor numbers to an area by the showcasing of events, such as home-grown festivals, to major international events such as the Giro D'Italia 2014. In terms of the impact on 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 cities.
- 5.56** The NITB Events Unit supports the development of the NI Events Industry, in order to grow visitor numbers and visitor spend in line with targets set by the Draft Tourism Strategy. The Events Unit also develops and administers the delivery of the Tourism Event Funding Programme for National and International Tourism Events occurring in Northern Ireland. The Events Industry in Northern Ireland has a major role to play in shaping and delivering the objectives set out by the Draft Tourism Strategy for Northern Ireland to 2020. The main support mechanism available for the Events Industry from NITB is the Tourism Event Funding Programme, an annual funding programme designed to support International and National Tourism Events.

What forms of events tourism are available in Mid Ulster?

5.57 According to statistics, there were 63 local events in 2014 which obtained sponsorship in Northern Ireland by the NITB Events Fund. Of these 63, only 1 was within the Mid Ulster Area, the *Cookstown 100* which was awarded £12,000. In terms of international events, there were 12 events which obtained sponsorship. None of these were within the Mid Ulster Area. In 2013 10 international events obtained sponsorship, again none of these were in Mid Ulster. 33 regional events obtained sponsorship. Only one of these events was in Mid Ulster, the Glasgowbury Music Festival in Draperstown.

6.0 Economic Impact of Tourism in Mid Ulster – Jobs, growth and the role of tourism to the Mid Ulster economy

6.1 Statistically, employment in the tourism industry in the Mid Ulster region rates well below the Northern Ireland national average. Latest results indicate that the Mid Ulster District rates 11th out of the 11 Local Government Districts in this field of employment type.

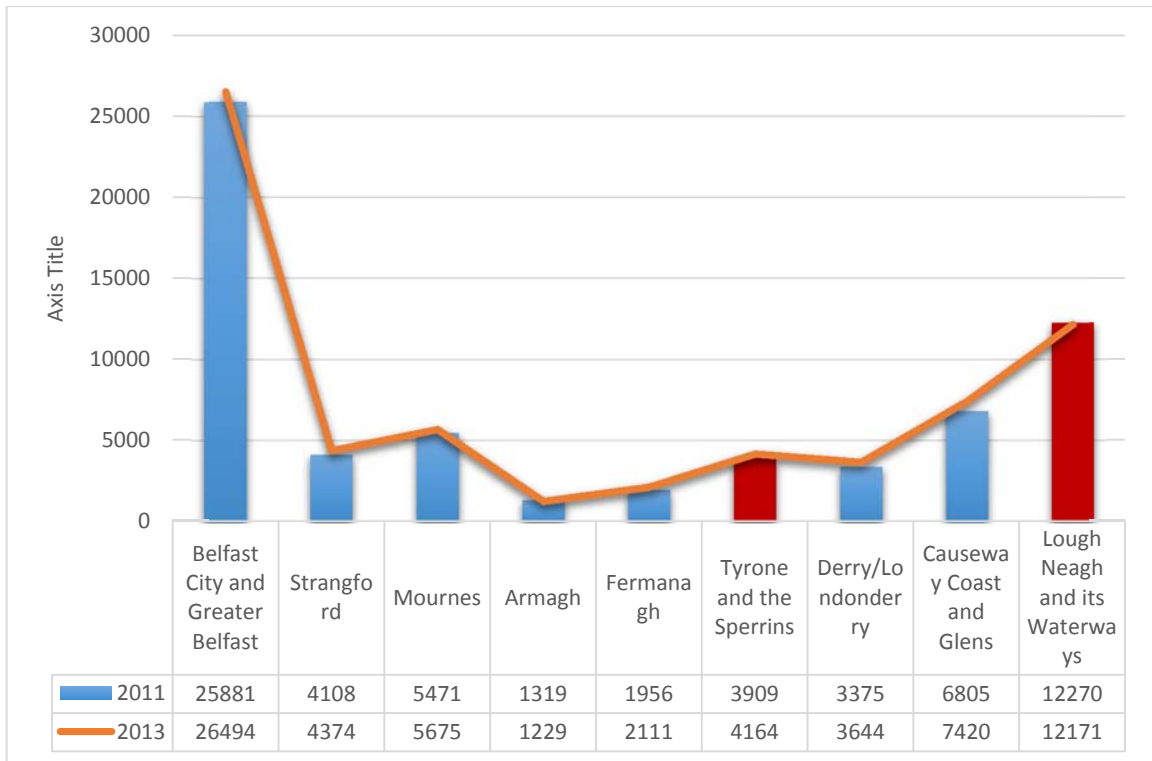
Figure 20: Tourism characteristic employment within the Mid Ulster District compared to Northern Ireland Average, 2013.

Area	Tourism Employee Jobs	% of Total
NI Total	58042	100
Mid Ulster Area	3165	5.5

* Source: Local Government District Tourism Statistics 2013, NIRSA.

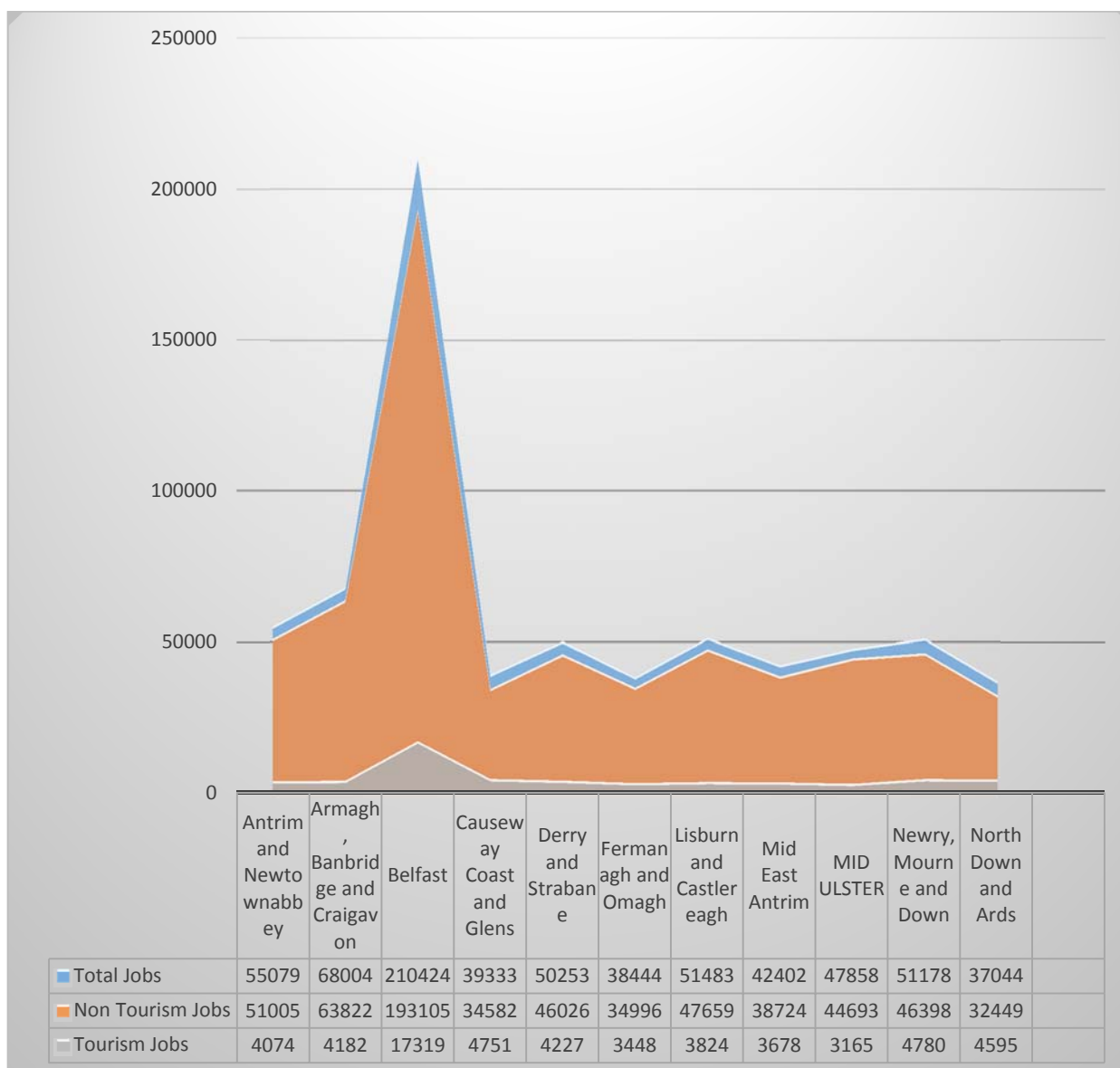
6.2 When analysing the Tourism Characteristic forms of employment by Key Destination Area (the nine separate destination areas as recognised in the NI Tourism Strategy), we see however that the “Lough Neagh and its Waterways” Destination Area employs the second highest number of people in Tourism forms of employment across the province. Analysis from the Census of Employment is based on the location of these jobs, not where the individual employees reside.

Figure 21: Tourism Characteristic Employment Figures by Key Destination Area 2011 – 2013.



* Analysis from the Census of Employment is primarily based on the location of jobs, not the home address of the employees. Statistics NI Census of Employment 2013 via NISRA.

Figure 22: Tourism Characteristic Employment Figures by Local Government District 2013.



7.0 Conclusion and Key Findings

7.1 Mid Ulster is strategically located with close links and good transport networks to other regions within Northern Ireland. As recognised by the RDS tourism can bring economic benefits and therefore appropriate forms of tourism should be encouraged that will enable sustainable development which will enhance the region and provide economic opportunity without detriment to the local environment. Overall, the tourism industry can provide a number of economic and social benefits to the area and whilst there is considerable potential for

future growth of this sector within the Mid Ulster Area, a sustainable approach should continue to be employed to safeguard the environmental assets and key resources the area has to offer. This approach is in line with key Strategic documents on the matter.

7.2 A summary of the key findings are as follows:-

- (i) In 2013 the Mid Ulster area had the second lowest number of overnight trips secured and the second lowest expenditure on overnight trips of all the local government districts;
- (ii) Overnight trips in Mid Ulster for the purposes of business is higher than the rest of Northern Ireland and the area has a higher percentage share of overnight visitors from Great Britain and Europe when compared to the rest of Northern Ireland;
- (iii) Mid Ulster has the second lowest number of hotel bed spaces and the third lowest number of guest house/bed and breakfast bed spaces in all of the local government districts;
- (iv) Activity tourism focusing on angling has the potential to create important economic benefits particularly in the rural area;
- (v) Water sport activities, including that based on connections to Lough Neagh, have important tourist potential;
- (vi) Mid Ulster has a wealth of built heritage assets which are a strong incentive towards attracting visitors to the area;
- (vii) The major natural assets of the area are very important in terms of their natural heritage value. Furthermore, Lough Neagh and its associated wetlands and the Sperrin Mountains, are which two of the nine 'key destinations' identified in the Draft Tourism Strategy for Northern Ireland 2020;
- (viii) Tourism characteristic forms of employment in the Mid Ulster area rate well below the Northern Ireland average.

7.3 Mid Ulster has significant tourism potential and any *Tourism Strategy* for the area has to be bedded in what is realistic to achieve through the local development plan. It is suggested that there are three options open to the Council in how they can approach tourism within Mid Ulster:

Option One: Maintain the Status Quo

The three current area plans for the region in total provide only 4 tourism opportunity zones (at Mountjoy and Washing Bay along the shore of Lough Neagh, at Davagh Forest and at Curran Quay/Kinturk Road) in addition to a tourism conservation zone in the Sperrins. Given the findings of this position paper, with Mid Ulster having the second lowest number of overnight trips secured and the second lowest expenditure on overnight trips of all local

government districts in 2013, it is clear that maintaining the status quo is not desirable or where we wish to be. By maintaining the status quo and having no interaction by way of the local development plan we would potentially lose the opportunity for growth in the region. This is not a desirable outcome given the importance of tourism to the economy, as demonstrated by the figures at section 6 of this paper.

Option Two: Case by Case

Tourism in Mid Ulster is something that could simply be driven by entrepreneurial activity whereby it is up to a developer to put forward cases for their tourism development based on defined criteria set out within planning policy. The risks involved with allowing a case-by-case scenario, particularly where it relates to tourist accommodation, is the potential for it to be abused as a means of obtaining planning approval housing development in the rural area. In addition, this option may also fail to highlight the opportunities for tourism development in the region in relation to the important assets of the area.

Option Three: Sustainable Approach

A more sustainable approach which seeks to target those areas with most to offer either by way of assets and activities or due to their strategic location, through the designation of Tourism Opportunity Zones, and where appropriate Tourism Conservation Zones, will encourage a more prosperous tourism industry. This option would protect the existing Tourism Opportunity Zonings at Mountjoy and Washing Bay along the shore of Lough Neagh, at Davagh Forest and at Curran Quay/Kinturk Road. Further Tourism Opportunity Zones could also be considered at the Sperrins, within the Clogher Valley, at Parkanaur Forest and at Lough Neagh e.g. at TRAAD and Ballyronan, while recognising the environmental sensitivities of this area. This option would also introduce Tourism Opportunity Zones at key road interchanges to allow for the development of hotel/motel development. It is considered that this option would allow Mid Ulster tourism to expand in a sustainable manner.

7.4 It is recommended that *Option Three* is the best approach to adopt for Mid Ulster with the key considerations and actions of a Tourism Strategy for the area as follows:

(i) How tourism demand is best accommodated:

- Demand is essentially from three sources i.e. traditional tourist product, business market and activity/event based. Demand within the Mid Ulster area is relatively low at present and therefore in addition to seeking to expand based on the current provision of attractions and assets the plan will also seek to focus on Lough Neagh, the Sperrins, River Blackwater and the key road interchanges.
- Utilise and develop the tourism potential of settlements by facilitating tourism development of an appropriate nature, location and scale.

(ii) Safeguarding of Key Tourism Assets:

- Protect our River corridors from development to ensure protection of river corridor habitat and to ensure that our waterways can be access and utilised in a sustainable and environmentally sensitive way.
- Protect the route of the Coalisland Canal and Ulster Canal to ensure their heritage is not destroyed and also so that they can be utilised for their tourist potential in relation to outdoor activities e.g. walkway, water based activities etc.
- Protect key hotel sites in the urban area so as to ensure they are not lost to re-development for other uses;

(iii) Identification of potential growth areas and activities:

- The Plan will maintain the Tourism Opportunity Zones already identified and considers that some of these areas should be extended and further such zones introduced at the Sperrins, within the Clogher Valley, at Parkanaur Forest and at Lough Neagh e.g. at TRAAD and Ballyronan, while recognising the environmental sensitivities of this area. Zones should also be considered at key road interchanges to allow for the development of hotel/motel development.
- Policy could also be introduced to promote appropriately designed and tight knit clachan style development so as to ensure second home development does not arise.

(iv) Environmental considerations resulting from tourism development:

- Whilst we wish to promote Lough Neagh as a tourism asset it is important that development is carried out in a way that does not impact on its environmental sensitivities and therefore any Tourism Opportunity Zones must be limited and focused on particular nodes outside of settlements.
- Safeguard natural and built heritage tourism assets from inappropriate development;
- Ensure a high standard of quality and design for all tourism development.

Appendix 1: Tourism Attractions in Mid Ulster

Table 1:

Magherafelt	<p> Bellaghy Bawn Reubens Glen Springhill House The Jungle NI Laurel Villa Tours Of Seamus Heaney Country, Magherafelt Adrian Margey Art Studio Kilcronaghan Activity Centre The Shepherds Rest Caravanning & Camping in the Sperrins Landscapes of Lower Glenshane Knockoneill Court Tomb, Maghera Seamus Heaney Private Tours Tamlaght O'Crilly Community Walk Swatragh Cycle Route The Horner Gallery McIntyre Gallery Drumlamph Woods Moyola Woods Church Island The Moyola Cycle Route The Slieve Gallion Cycle Route Moyola Park Golf Club Ronan Valley Golf Club Tobermore Golf Driving Range Knockloughrim Windmill St. Lurach`s Church Tirnoney Dolmen Tirkane Sweathouse </p>
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Cookstown	Ballyronan Marina Drum Manor Forest Park Beaghmore Stone Circles Lissan House Ardboe Cross Tullaghoge Fort Davagh Forest Trails Burnavon Arts and Cultural Centre Kinturk Cultural Centre Coyles Cottages Killymoon Castle Lough Fea
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Dungannon	<p>Dungannon's Country Park and Lake. Peatlands Park Moygashel Linen Green Annaginney Fishery and Farm Park Parkanaur Forest Park Corrick House Hotel and Spa A.W.O.L Adventure Centre Island Turf Craft Visitors Centre Knockmannny Forest Servite Priory Benburb Valley Park and Castle Donaghmore High Cross Donaghmore Heritage Centre Hill of the O'Neill Ranfurly House Arts & Visitor Centre The Argory Blessingbourne Estate and Trail Centre Clogher Valley Golf Club Clogher Valley Caravan Park Mullaghfad Forest Fardross Forest Favour Royal Forest Altadaven Wood Forest Grant Ancestral home Caledon Village Caledon Castle and Grounds Heritage World Dungannon Castlecaulfield and its ruins Washing Bay local Nature Reserve The Cornmill, Coalisland Annie Hall, 19th Century house Stewartstown Drumcairne House and Forest Drumcairne Forest.</p>
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