Davagh Forest Park

Hill of The O'Neill

Seamus Heaney HomePlace

Our plan to develop tourism in Mid Ulster to 2021

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Comhairle Ceantair
Lár Uladh
Mid Ulster
District Council

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1   Introduction

1.1   Key Priorities

Mid Ulster has the potential to expand its tourism offer significantly by focusing upon one new tourism strand, currently under development – linked to Seamus Heaney - and two strands that are significant and prominent, but so far undeveloped, relating to Outdoor Activities and to Archaeological sites, the History and Heritage of the island of Ireland, Northern Ireland and the area itself. These strands, or themes, will serve as the strategic core propositions for Mid Ulster, to attract visitors, encourage them to stay longer in the area and ensure that tourism contributes to the local economy.

1.2   A Living Strategy for Mid Ulster Tourism

The Mid Ulster Tourism Strategy and Action Plan provide a framework to guide destination development, planning, management and marketing over the period 2016 - 2021. The Strategy is a living document that should be continuously updated to take account of investments, successes and changed market conditions in the area. A living strategy is one that is owned by the tourism industry, local authority, local communities and wider stakeholders and embodies the aspiration for Mid Ulster to be a successful tourism destination.

This strategy embodies a shared vision for Mid Ulster and reflects the geographical attributes of the area (of which, more later), the characteristics of tourism operators and compelling tourism attractors upon which growth can be built, provided concerted action is taken to build on opportunities and address weaknesses.

1.3   The Brief

There are over 3,000 tourism and tourism related jobs in Mid Ulster, which represent a modest proportion of all jobs[1] ; yet tourism's importance to Mid Ulster lies both in its links to the retail, food, cultural and heritage offer, and to wider perceptions of the area. Opportunities for tourism growth lie in galvanising existing and new tourism propositions and capitalising on Mid Ulster's central geographical position in Northern Ireland.

From April 2015, the former areas of Dungannon and South Tyrone, Cookstown and Magherafelt fall under the auspices of the new authority of Mid Ulster District Council[1]. The creation of the new Council[2] and investment in the Seamus Heaney HomePlace – bringing a dynamic new dimension to Mid Ulster tourism – necessitate the need to evaluate tourism priorities and actions across the whole area, with opportunities to integrate the proposition from each legacy council.

In mid-2015, the Council commissioned Edinburgh based tourism experts BTS to prepare this Tourism Strategy and Action Plan for the Council, stakeholders and the tourism industry in the area. The overall aim of the work is to develop a Tourism Strategic Plan that includes an overview of tourism activities, highlights potential opportunities and how to address gaps. While specific opportunities were identified as Heaney Country, Outdoor Activities and History and Heritage, the role of the strategy is to test and define how these opportunities (and any others) can be developed and exploited.

The preparation of the Strategy and Action Plan has been undertaken through stakeholder consultation, workshops with and a survey of the tourism trade, workshops and discussions with elected members and senior staff of the authority. A market analysis (including data held by Tourism Northern Ireland and Tourism Ireland), policy review and review of the tourism product have been undertaken through desk research. Additional analysis has been undertaken of Seamus Heaney tourism opportunities through discussions and further workshops.

Guidance and direction of this commission has been provided by senior tourism and economic development managers in the Council.

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1   3,165 of 90,000 jobs in the area = 3.5%
2   With extended Planning, Local Economic and Tourism Development and Community Planning powers

2   Destination Profile, Market Analysis and Key Issues – Summary

Here we provide a summary of the market analysis and key issues impacting tourism in Mid Ulster.

2.1   Mid Ulster Profile

Mid Ulster covers about 14%[3] of NI, extending some 60 miles from Swatragh in the north to Fivemiletown in the south. There is a population of 141,000 working in manufacturing, services, construction, retail, agriculture, forestry and fishing industry sectors.

An important characteristic of Mid Ulster is its location within an hour's drive of Northern Ireland's significant tourism regions – Causeway Coast, Derry/Londonderry, Fermanagh Lakes, Belfast, and also the cross border destinations of Donegal and Monaghan. This strategic location presents opportunities to develop and promote tourism experiences within striking distance of these destinations and encourage more visitors to visit and stay within Mid Ulster.

Current tourism performance is largely based on rural and outdoor activities, linked both to the Sperrins and across the whole Mid Ulster area and tied into the area's natural attributes. Tourism performance is also linked to the strong retail proposition of Cookstown, Dungannon and Magherafelt and a compelling mix of heritage properties and historic and archaeological sites, again spread right across the district. Recent years have seen dynamic tourism developments in the area - a strong events-based programme, Hill of The O'Neill and Ranfurly House Arts and Visitor Centre, mountain biking at Davagh and the development of the Dark Skies project.

But the central issue for Mid Ulster is its comparative lack of visibility in the tourism marketplace, linked to limited levels of visitation (214,000) and spend (£27m) equivalent to 4.6% of NI overnight trips and 3.6% of NI spend in 2014. The area is dominated by day trips and those visiting friends and relatives. Mid Ulster, in tourism terms, is a developing destination that in recent years has not fulfilled its potential to contribute to economic growth.

2.2   Key Issues

A number of key issues have implications for the way forward and how tourism development and promotion is managed. We summarise these issues here;

1. Tourism is not recognised as an integral part of the economy and residents underestimate the tourism attributes of the area and the economic role of the sector.

2. While day visitation to the area is important, the reasons to visit are not well articulated and so NI residents are unaware of what they should visit for and what experience they might have.

3. The current tourism propositions for the area are relatively weak (retail being the exception), resulting in comparative low visitation levels and spend from out-of-state visitors.

4. The visibility of Mid Ulster's natural heritage, outdoor activity and historic and archaeological heritage are lost partly because they are spread across the area and also because these attributes haven't been pulled together into distinct propositions for visitors.

5. The two destinations classified by Tourism NI and linked to the area– Tyrone and Sperrins and Lough Neagh and its Waterways – are the weakest of NI's 9 destinations, from the point of view of visitors' propensity to visit and the dissipation of strategic decision making spread across a number of authorities.

6. The Sperrins AONB falls under the auspices of four local authorities[4]. The absence of a single co-ordinating management body responsible for landscape, tourism and related issues, results in a policy vacuum and implementation weakness, as they relate to countryside access, product development, safeguarding the environment etc.

7. Lough Neagh offers opportunities for outdoor recreation but suffers from comparable issues of a lack of developed product, difficult access (to the water) and shared decision making amongst 4 local authorities[5] .

8. There is a weak accommodation base, exacerbated by variable occupancy levels (and thus viability) throughout the year.

9. The SME and microbusiness characteristics of the tourism sector in the area exacerbate challenges of communicating and engaging with the trade and developing collaborative projects across the trade.

10. The geographical dispersal of the area – in terms of scale, distance and character – suggests a challenge in creating both a tourism identity for Mid Ulster itself

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and for a hierarchy of individual communities that have identities and propositions that could encourage visitation.

11. Continuing constraints in countryside access limit the opportunity to exploit the natural environment to its full potential for outdoor activities .

12. The tourism industry in Mid Ulster is characterized by owner operators and small businesses, many of whom feel helpless in the light of trading conditions and their relationship with tourism and public agencies. These conditions contribute to a sense of disillusion and helplessness in some quarters.

13. The quality of the visitor experience is key to tourism success – building reputation and referrals - but is vulnerable in the area because of different levels of service quality, expertise and knowledge within the tourism

trade. The changing role of VICs in visitor dispersal, building product awareness and industry networking and connectivity is an opportunity to enhance the visitor experience and work with operators to help them raise their standards.

14. At the time of writing, the review of NI's tourism is being conducted by the Department for the Economy. Although final results and recommendations have not yet been made (they are due in the summer) there are a number of issues that emerge from the consultation process. These resonate with Mid Ulster's current situation – the importance of tourism as an economic generator, a fragmented industry, the need for industry leadership, the requirement to focus on out-of-state and overseas markets[7] .

2.3   Opportunities for the Future

However, an extremely positive context exists for developing tourism in Mid Ulster, resulting from:

1. The establishment of the new Council, which brings a range of skills and integrated powers together, while the District area it covers includes a stronger range of sites and facilities which can be drawn into stronger propositions with greater market visibility.

2. The identified opportunity to develop the tourism product and experience associated with Seamus Heaney has been recognised by the commitment to construct and open the £4.2m Seamus Heaney HomePlace in Bellaghy in mid-2016. Links to other literary tourism centres and experiences throughout the island of Ireland will offer strong visibility.

3. The application of business development interventions and support from the new authority to support the SME and microbusiness tourism community.

4. The opportunity exists to exploit Mid Ulster's central location within NI and improving access (completion of the Magherafelt Bypass; A6 dualling; Randalstown (M22) to Castledawson). The central location of Mid Ulster could also boost camping and caravanning based in the area. However, historically strong dependence on the NI domestic day and overnight market for visitation highlights the need to encourage more overnight stays from out-of-state markets and their greater expenditure.

5. The strength of Mesolithic, Neolithic, pre Christian, early Christian and other archaeological sites and facilities across Mid Ulster, right up to the 2nd World War, offer a significant and compelling tourism proposition, exploitation of which will give Mid Ulster significant competitive advantage. The uniqueness of Mid Ulster to exploit the history of the O'Neills, the Flight of the Earls, and the development of the plantations contribute to this potential.

6. Outdoor tourism sites and experiences, including the presence of very successful outdoor activity providers, suggest that the outdoor tourism product can be exploited further right across the area.

7. The success of the area in initiating and running events which have grabbed the imagination – such as the Dark Skies project – offer a positive foundation for new events to enhance off season visitation.

8. Enhanced opportunities for trade engagement and communication established through the Flavour of Tyrone (see section 5.1 below).

9. Three significant Heritage Lottery Fund projects at different stages of development relate to the Lough Neagh Landscape Partnership, the Seamus Heaney trail development and to the Lower Sperrins to the Carrickmore Plateau to the Pomeroy Hills[8]; all offer exciting opportunities to integrate tourism in the landscape.

10. The potential to exploit the Sperrins for outdoor activities and for its contribution to the history and heritage of the area is complemented by the potential of Lough Neagh. The reopening of the Ulster Canal offers a medium to long term opportunity to intensify use of the Lough for recreation.

11. A comparative "new start" offered to tourism development and promotion by the establishment of the new Council suggests the chance to reevaluate and build on technologically based routes to market, exploiting broadband and consumer use of smart phones, iPads etc..

12. An invigorated district wide programme of marketing and promotion is achievable, including events, enhanced signage, technology use, visitor information services and limiting print production.

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8   The latter project jointly with Fermanagh and Omagh District Council

3   Vision and Strategic Direction for Mid-Ulster Tourism 2016-2021

Mid Ulster is not a single or unified tourism "product" or destination; it has not been, to date, a discernible tourism location[9]. It is currently an amalgam of tourism products and visitor experiences, with individual attractions and activities succeeding independently in the tourism market. With this lack of distinctiveness, separating it from other competing destinations, the challenge is to cohere Mid Ulster's tourism assets and attributes, to give them visibility and give visitors reasons to visit.

The vision for tourism in Mid Ulster comprises two complementary components:
• Developing the propositions for Mid Ulster; and
• Ensuring that the processes for developing and promoting products in the market place are efficient and effective.

3.1   The Vision for Mid Ulster Tourism

To enhance Mid Ulster's image and reputation for visitors and grow the visitor economy to £50m by 2021 as measured by overnight visitor expenditure.

3.2   Strategic Aims and Objectives

The aims and objectives of the strategy are as follows:

1. To develop three strategic tourism strands, around which the attributes of the area and the industry can cluster and to attract visitors. The three strands or themes are:
       i. Seamus Heaney
       ii. Archaeological sites, history and heritage
       iii. Outdoor Activities
2.   To grow tourism as an economic driver for Mid Ulster;
3.   To manage the destination and create the preconditions for successful tourism;
4.   To profile and promote Mid Ulster to enhance the visibility of the area and boost visitation and spend;
5.   To support the dispersal of visitor spend and investment across the area.

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9   Although arguably it is a distinct business location for e.g. logistics, industrial services and manufacturing activity

Seamus Heaney

Strategic Themes and Actions

The aims and objectives of the strategy are translated into strategic themes and interrelated actions for delivery, as follows:
1. Development of three strategic tourism strands (Seamus Heaney, Archaeological sites, history and heritage and Outdoor Activities);
2. Tourism as an economic driver;
3. Destination Management;
4. Promoting Mid Ulster for tourism;
5. Dispersal of visitor expenditure and supporting local communities.

Where actions are defined under each theme they are captured in more detail in the action plan.

4.1 Development of Strategic Tourism Strands

Mid Ulster has one new tourism strand under development – linked to Seamus Heaney - and two strands that are significant and prominent, but so far undeveloped, relating to Outdoor Activities and to Archaeological sites, the history and heritage of the island of Ireland, Northern Ireland and the area itself. These strands, or themes, will serve as the strategic core propositions for Mid Ulster, to attract visitors, encourage them to stay longer in the area and ensure that tourism contributes to the local economy.

The following sections drill down into what actions are required to develop and integrate these tourism products into the tourism proposition for Mid Ulster.

4.1.1 Seamus Heaney

The strong and compelling association of Seamus Heaney with Bellaghy and the surrounding communities and countryside provide the foundation for the development of this tourism strand. The £4.2m Seamus Heaney HomePlace at Bellaghy opened in 2016, with plans to develop literary and heritage trails into the local landscape to place connections referenced in Seamus Heaney's poems and literature.

The community and educational roots of HomePlace are important, but so too is the objective for the centre and its trails to act as an economic generator for the village and surrounding area, and as a tourism hub linking relevant sites in the region. The association of the trail with the Lower Bann would be one such linkage. The Seamus Heaney proposition will underpin – alongside the other tourism strands below – the visibility, reasons to visit and quality of visitors' experiences in Mid Ulster.

Seamus Heaney's stature and significance go well beyond the immediate locale of County Derry/Londonderry and Mid Ulster, and indeed well beyond Northern Ireland and the island of Ireland. Seamus Heaney's reputation is worldwide and the project must therefore be seen and be developed as a national and international centre of excellence and as an iconic addition to Northern Ireland's tourism portfolio, with strong potential to attract visitors from out-of-state and from overseas; the Heaney project is

therefore of enormous importance to Mid Ulster. A separate action plan has been prepared to support the tie in of the HomePlace and trails with the tourism community and wider stakeholders, all with the intention of ensuring:

• High market visibility for the Seamus Heaney tourism product;

• Successful integration of the product with the tourism and hospitality sector in Mid Ulster, and thus have the local industry acting as ambassadors for it; and

• Ensuring that the travel trade (those who decide and influence where visitors tour and visit) place the Seamus Heaney product prominently on their itineraries, particularly for out-of-state visitors.

The vision for the Seamus Heaney proposition is therefore:
To integrate the Seamus Heaney HomePlace and Heaney experience into the wider tourism offer for Mid Ulster, NI and the island of Ireland.

This would be achieved through a programme of events and activities that promote the HomePlace, its exhibitions and collections to maximise visitor numbers.

The Council and HomePlace manager are already undertaking a significant programme of work. This includes developing relationships with stakeholders, planning audience development, an education programme and community outreach, developing the marketing rationale for the HomePlace and proposed trails and positioning them as a significant national and international visitor attraction and resource dedicated to the life and work of Seamus Heaney.

Actions

There are several themes under which actions and tasks are necessary to establish the Heaney experience effectively in the tourism market.
Priority actions that fall under the auspices of the tourism strategy are as follows:

1. Development of the event programme, marketing and communications (by the HomePlace):

- Developing and implementing a marketing and communications plan for the Seamus Heaney experience to include engagement and communication with the tourism trade, Tourism Ireland and Tourism Northern Ireland and with the travel trade.
- Develop a year round events programme both within the HomePlace and linked to the wider Heaney experience. Integrate this in communications and marketing, as above.
- Develop a strong digital platform for the HomePlace, including a continuous social media presence.
- Integrate marketing of the HomePlace and trails into the visitor marketing for the area (see section 4.4. below).
- Explore opportunities of working with other Ireland literary centres and develop a wider all-Ireland literary experience.

2. Product and service development (by operators working independently): review by each business of their marketing and operational plans to see how the Heaney proposition can be integrated – to include marketing and sales plans, digital marketing etc.

3. Business collaboration and networking (between operators working together): support for operators to cluster and develop new product, services and experiences for visitors (e.g. accommodation, transport, tour guides, food and drink, entertainment).

4. Skills development/mentoring programme to engage all business through World Host training for the Seamus Heaney experience, including developing Mid Ulster as a World Host destination, to set the benchmark for the quality of welcome provided to visitors (see section 4.3 below).

5. Engagement and working with the tourism trade (the centre and tourism operators): the HomePlace and tourism trade to collaborate on marketing, promotion, events, new products and services.

6. Preparation and implementation of a Bellaghy village renewal and public realm plan to enhance the quality of the environment for visitors (and residents)[10] .

7. Complete the development and implementation of the Seamus Heaney trails, celebrating his literature and legacy and extending the appeal of the Heaney experience to NI, out-of-state and overseas visitors[11] .

Archaeology, History and Heritage

4.1.2 Archaeology, History and Heritage

Arguably, Mid Ulster contains the richest seam of archaeological, historic and heritage sites and facilities in Northern Ireland, stretching from Mesolithic, Neolithic, pre Christian, early Christian and medieval times to the plantation era and up to the 2nd World War. The archaeology, history and heritage theme suffers from issues of lack of visibility, limited understanding by residents and visitors alike of the significance of these assets within an all-Ireland as well as a Northern Ireland context and consequently limited appreciation of what the visitor experience will be. This results in a barrier to visiting.

Mid Ulster's rich and diverse cultural and historical inheritance provides a strategic opportunity to develop tourism and enhance visitation to the area, and across the area. Mid Ulster has very many historic sites and facilities. Among them are more than 185 scheduled sites and monuments protected under planning policy for their historical value. In addition, there are 39 State Care Monuments that are maintained for both public amenity and conservation and a number of historic houses. Most significant amongst these assets are:

- Ardboe Cross
- Ballynagilly Neolithic house and settlement
- Ballyscullion Park
- Beaghmore Stone Circles, Cairns and Alignments
- Bellaghy Bawn
- Blessingbourne
- Broughderg archaeological remains
- Clogher Cathedral
- Clogher Hillfort
- Donaghmore Cross
- Errigal Kerrogue Cross
- Flax Mill Visitor Centre, Upperlands
- Hill of The O'Neill and Ranfurly House Arts & Visitor Centre
- Knockoneill Court Tomb
- Lissan House
- Killymoon Castle
- Parkanaur Manor House
- Tirkane Sweathouse
- Tirnony Dolmen
- The Bridewell, Magherafelt
- St Lurach's Church
- St Patricks Chair and Well
- Springhill House
- Tullaghoge Fort

4.1.2 Archaeology, History and Heritage

Archaeology, history and heritage are a subset of cultural tourism. According to UNESCO, cultural and natural heritage tourism is "the most rapidly growing international sector of the tourism industry"[12]. Although international data on the size of this market are hard to come by, the OECD and the UNWTO report that in 2007, cultural tourism accounted for 40% of all international tourism. The Heritage Lottery Fund estimated in 2013 that "heritage tourism" generated £26.4bn towards the UK economy, fuelled by both international visitors and more Britons deciding to holiday at home; more than a quarter of holiday activities undertaken by Britons who holiday in the UK now involve heritage, both historic and natural heritage.

Untangling the relevance of this statistical overview to Mid Ulster is problematic, since the number of visits to many sites is unrecorded. However, the analogy of Kilmartin in Argyll, Newgrange in County Meath and Orkney is relevant.

• Kilmartin Glen is located between Oban and Lochgilphead, in the west of Scotland. There are more than 350 ancient monuments within a six mile radius of the village, with 150 of them being prehistoric (the area spans 5,000 years with a multitude of cairns, standing stones, carved rock, stone circles, forts and castles). Kilmartin Glen is considered to have one of the most important concentrations of Neolithic and Bronze Age remains in Scotland. The remains of the fortress of the Scots at Dunadd, a royal centre of Dal Riata, are located to the south of the glen. The voluntary Kilmartin House Trust[13] oversees the sites and has a museum and visitor centre attracting 40,000 people p.a.

• Newgrange's Brú na Bóinne Visitors' Centre has managed as many as 200,000 visitors p.a. to the UNESCO World Heritage site, making it the most visited archaeological monument in Ireland. In addition to the large passage tombs of Knowth, Newgrange and Dowth, 90 recorded monuments are scattered across the area[14].

• In Orkney, up to 55,000 people explore the Neolithic village of Skara Brae every year. Visitor surveys show that just over 142,800 people visited Orkney spending over £31 million in the local economy over 2013[15]. The main influence on visitors deciding to come to Orkney (51%) was an interest in the archaeology and history of Orkney, with 80% actually visiting archaeological sites.

The significance of the history and built heritage of Mid Ulster is recognised in the Heritage Lottery Fund approved project under the Lough Neagh Landscape Partnership Project and the planned joint project between Mid Ulster and Fermanagh and Omagh Councils[16]. This latter project aims to address the preparation of a Landscape Conservation Management Plan stretching from the Lower Sperrins to the Carrickmore Plateau to the Pomeroy Hills, acknowledging the density and importance of the archaeological attributes of the area. NIEA[17] and Council investment in improvements at Tullaghoge Fort, which opened in June 2016 will also strengthen the visitor appeal of this facility.

Mid Ulster is also the only place to appreciate the history and importance of the O'Neills and the Flight of the Earls, while also being at the centre of the C17th plantation movement.

Events are important ways to raise profile and generate visitation. So for instance the Dark Skies project at Beaghmore Stone Circles is out of season, yet generates strong publicity and visitation. Heritage Open Days and weekends and the heritage education programme at the Hill of The O'Neill & Ranfurly House Arts & Visitor Centre are additional events, but there is an opportunity to generate more. The unique charter of the Dark Skies Project in Northern Ireland offers opportunities for exploiting visitation.

12   Mintel, 2010
13   www.kilmartin.org/
14   http://whc.unesco.org/en/list/659
15   www.hie.co.uk/about-hie/news-and-media/archive/survey-results-show-rise-in-visitors-to-orkney.html#sthash.zMLPRsgi.dpbs
16   Heritage Lottery Landscape Partnership Scheme Stage One Application
17   Now part of the Department for Communities

Actions

We don't suggest that a new visitor centre is established, as with Kilmartin or Newgrange, but the following actions are required in order to capitalise on Mid Ulster's wealth of archaeological, historic and heritage attributes:

1. Create a unifying heritage and history tourism theme across Mid Ulster, building on the wide range of assets across the area, positioning Mid Ulster as a centre of excellence for history and heritage to encourage visitors to the area, to stay longer and spend more.

2. These archaeological, historic and heritage assets and sites need to be drawn into a compelling and coherent tourism product, requiring them to be packaged and promoted to visitors.

3. Tie the history and heritage theme into the branding for the area (see section 4.4 below).

4. Develop a series of itineraries for visitors to encourage dispersal.

5. Develop a year round programme of events linked with historic venues to generate profile and attract visitation, including continuation of the Dark Skies project.

Outdoor Activities

The former local authorities, Forest Services and other stakeholders, including a strong operator base, have invested successfully and heavily in the outdoor activity market across Mid Ulster. The Sperrins provide an envelope within which many outdoor activities take place, although they have problems of their own, in terms of constraints of countryside access in the area and policy and priorities in the area spread across (now) four local authority districts. Lough Neagh, likewise, is an underutilised resource, again with decision making spread across four different local authorities.

Like the Archaeology, History and Heritage theme, outdoor tourism in Mid Ulster suffers from comparable issues of lack of visibility, limited understanding by residents and visitors alike of the significance of outdoor assets and consequently limited appreciation of what the visitor experience will be. This results in a barrier to visiting.

Mid Ulster's outdoor activity attributes are found across the whole area and offer a wide range of adrenaline fuelled and soft activities, with the following particular strengths – Walking, Cycling, Mountain Biking, Canoeing, Angling, Multi-Adventure Centres (e.g. Todds Leap, and Jungle NI) plus a number of Activity Tourism providers in the area. Horse riding and golf add further value to

the product of the area. In many places opportunities for developing the outdoor product have been taken by national agencies, the local authority, Outdoor Recreation NI, sports and recreation interest bodies and local communities. These are important because they emphasise the strength of the area for outdoor activities, but they also require to be drawn together into a coherent and visible attractor for visitors.

The objective of focussing on the outdoor activity market lies in its scale and size and the opportunity of strengthening the competitiveness of the Mid Ulster destination, by building on this undeveloped sector.

4.1.3   Outdoor Activities

The outdoor activity market in Mid Ulster is vast. The overriding characteristic of the market is that it is dominated by day visitors (including the education market), important for the reputation and status of the area to accommodate outdoor activities and residents, however, both groups have limited tourism spend[18].

The number of sites and physical attributes available in Mid Ulster to accommodate outdoor activities – from passive activities like walking and strolling, through to adrenaline fuelled adventures – range from open countryside, in the Sperrins and around Lough Neagh and the Lower Bann, bike and walking routes away from roads, through to more formal trails within specific sites. These sites include forest parks which the local authority manages on behalf of Forest Services, to private sites like Blessingbourne. Substantial investment has been made in mountain biking facilities and trails at Davagh and Blessingbourne. Two major private operators (Jungle NI at Magherafelt and Todds Leap at Ballygawley) provide a range of activities and have very effective marketing to NI residents and to those living in the Republic of Ireland. Events have also been promoted linked to outdoor activities, with Davagh being particularly active – e.g. Davagh Duathlon, Enduro Night Rider and Rough Riderz Taster – and Parkanaur's Blood Sweat & Tears Extreme 10k and Sperrin Harriers Winter League Trail Series. These events help to generate visitation, visibility and reputation.

Maximising the economic value of outdoor recreation and adventure tourism requires the reputation and visibility of the destination to improve significantly to increase the number of visitors and have more of them staying overnight (and spending more). The "Unique Outdoors" is one of Tourism NI's four key pillars, around which the NI tourism brand and marketing activity is orientated, and Mid Ulster is very well aligned with this theme.

Previous analysis[19] identified remoteness and distance from cities, markets and transport hubs as being equally the area's biggest weakness and a strong attractor. Other weaknesses of the area include limited collaboration amongst tourism providers to develop activity based packages with local accommodation and weak marketing of the area (for activities). In the Sperrins, the ORNI Recreation Action Plan and the Forest Recreation Audit promote the outdoors and activity tourism but the promise of the area cannot be fulfilled because of access constraints, lack of visibility and the absence of any agreed marketing and promotional plan by the four LAs. (Although outside our remit, we include an appendix with actions that should be taken in so far as they relate to the future of the Sperrins.)

Crucially, despite the strong attributes of the wider area for outdoor activities, the (potential) visitor finds it difficult to identify what their experience will be, how many activities they can access, and where they might stay, all barriers to visiting and staying.
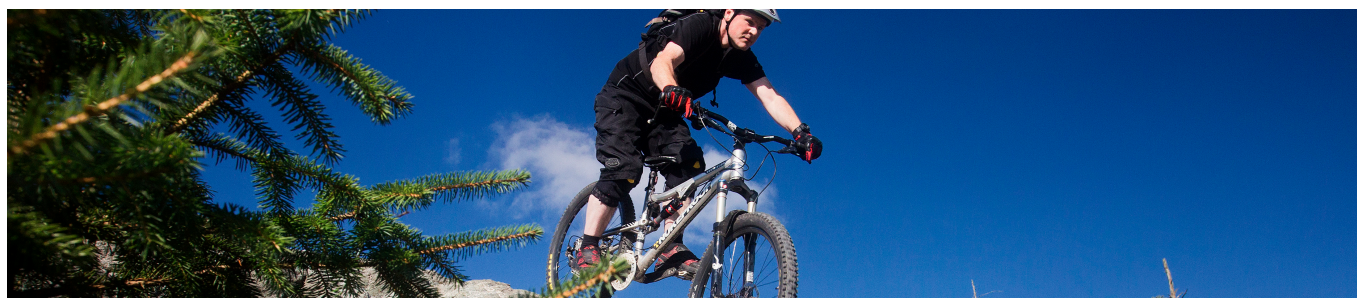
The objectives for outdoor activities to be a strategic component of Mid Ulster's tourism lie in:

• Drawing the components, sites and operators working in outdoor tourism together to package and present a coherent and composite product to the market;

• Enhancing the visibility, appeal and promotion of the area for outdoor activities;

• Increase visitation to and the economic value from outdoor activities for Mid Ulster;

• Promoting business opportunities from outdoor tourism.

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18   Spend per visit to Tyrone and Sperrins in 2011, at 38% of the NI average, was substantially lower than other areas in NI11
19   Wild Adventure in Tyrone and Sperrins, BTS, 2015

Actions

Improving the economic contribution of outdoor and activity tourism is dependent on:

1. Creating a coherent and compelling range of outdoor activity sites and facilities, by pulling all existing and potential new sites under the one umbrella – this requires the wide range of outdoor activities to be articulated and packaged for the visitor, tying into the planned branding for the destination (see section 4.4 below).

2. Positioning Mid Ulster as a centre of excellence for visitors, thus encouraging them to visit the area, stay longer and spend more.

3. The development of the outdoor and activity tourism product comprises both a physical focus – sites, trails, development and activity hubs – and management and organisational dimensions – marketing, interagency collaboration and cluster development - prerequisites to the successful development of the destination for outdoor tourism. Collaboration with activity tourism operators to package and market year-round product is required.

4. The following forest parks should be prioritised to accommodate and create new and enhanced activities and facilities – Parkanaur, Knockmany and Drum Manor. Improvements would include better welcome facilities, trails for cycling and walking.

5. Events to generate profile and attract visitation should continue to be a priority, linked to outdoor activities. A year round programme should be developed.

6. Additional camping and caravanning or "Touring in the Trees" caravan sites are required to encourage visitation; specific sites identified include improvement and extension of Drum Manor, extending Parkanaur caravan sites plus potential replacement for that lost in the Clogher Valley.

7. A special focus is required to address countryside access and negotiate more and better access for activity tourists, such as the Greenway plans in the Blackwater Valley and in the Sperrins AONB.

Tourism as an Economic Driver
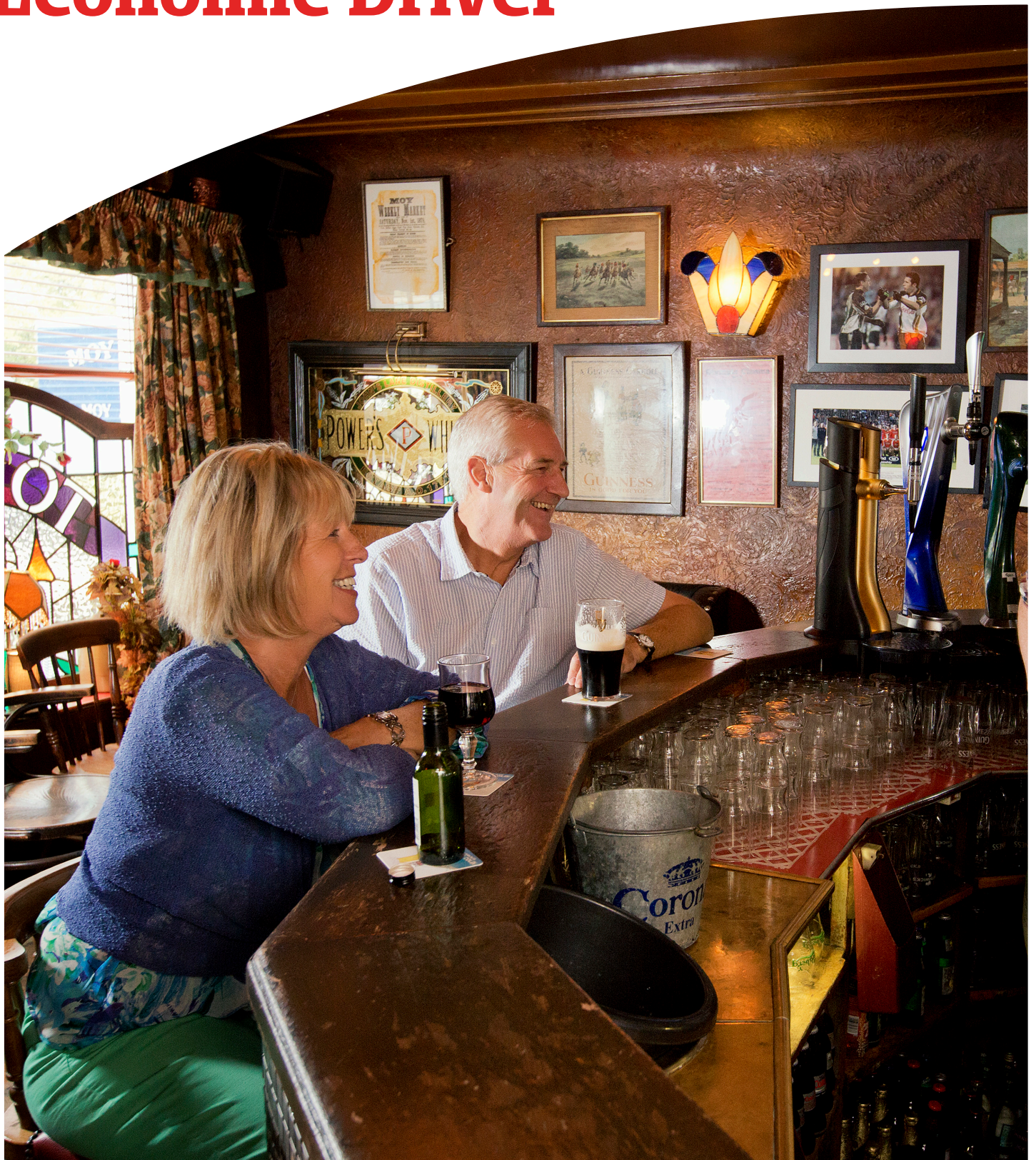
Tourism in Mid Ulster is largely unrecognized as an economic driver. There is general appreciation that it could grow in importance, helping to sustain more jobs and businesses, especially as a year round sector. However, its growth is dependent on preconditions being met, which are articulated in the strategic themes in this strategy and the associated actions.

Currently, the tourism product and experiences in Mid Ulster are dissipated across the area, from the River Blackwater and Clogher Valley, through Dungannon, around Lough Neagh, to the Sperrins and the area north of Magherafelt. As importantly, the outdoor activities and history and heritage tourism products are not yet adequately defined to be "attractors" that will stimulate market recognition of Mid Ulster and more visitors and their spend. Many potential visitors don't know what the tourism assets of the area are and what their experience will be. Addressing marketing is therefore integral to stimulating economic value for the area.

Enhancing the role of tourism as an important economic activity requires local agencies, stakeholders and residents to understand its importance and potential. Thus, agencies need to be continuously persuaded to commit to investment in products and services and residents to understand how tourism helps to sustain local facilities, like outdoor sites, arts centres, cafes and restaurants etc. One role of this strategy and action plan is to help direct that commitment to where it is needed.

Actions

The actions under this theme are:

1. Adoption of and commitment to this strategy and the associated actions by the local authority.

2. Generate the commitment and support of the tourism trade to the strategy and its actions. We recommend that this be undertaken through an agreed engagement and communications plan with the trade, and through a defined partnership approach, which is defined below under actions in section 5.1.

3. Communication plan with agencies, stakeholders and residents to promote the importance of tourism in the area. This will require the value of tourism to be articulated and a sustained programme of communications to be delivered. This might be focused on key activities, assets, events etc. throughout the year.

4.3   Destination Management

The development of a competitive destination requires a number of challenges to be addressed to ensure the success of the area in attracting and accommodating visitors:
• to nurture and encourage a robust and competitive tourism industry, made up of the operators in the area;
• to establish good communication and collaborative relationships between stakeholders with an interest in sites, facilities, attractions and marketing;
• to ensure a welcoming and clean public realm, including public toilets, street furniture, roads, viewing points, signage, interpretation etc., all necessary to facilitate the quality of the visitor experience;
• to guarantee the quality of welcome and hospitality service for visitors, in addition to effective information provision (pre, during and post visit).

Falling under the auspices of "destination management", investment in tourism product and its marketing will be wasted if the destination is unable to give visitors positive, quality experiences that encourage positive word of mouth and reputation (the cheapest form of marketing) and repeat visits.

Under the auspices of the tourism strategy, the local authority has to set the tone for future growth in the destination and how relationships with the tourism trade and other stakeholders will operate. Mid Ulster Council must also ensure that all public services[20] are aligned to the needs of the visitor. Guidance from the Department for the Economy[21] suggests that destination management is coordinated management to address all the components that go to make up the quality of the visitor experience.

Hospitality and service quality go hand-in-hand and are vital dimensions to a successful and competitive tourism destination. In Mid Ulster, tourism operators have quite variable levels of service standards: programmes to raise awareness and address hospitality and service quality are important opportunities to enhance industry competitiveness.

Underpinning the strategic tourism strands referred to above – relating to Seamus Heaney, Outdoor Activities and History and Heritage – are the other activities which visitors undertake: shopping, eating, being entertained, staying and sleeping etc. The quality of these experiences has to be high and service standards and the quality of welcome need to be concentrated on. Equally, the information available, broadband quality, distribution of print locally and emphasis on digital and social media are important channels to ensure visitors know what to access, where.

Representing the local authority and being a half-way house to the trade, Visitor Information Centres should have the role of encouraging increased length of stay, repeat visitation, improved visitor yields and enhanced consumer awareness, as well as working with the tourism trade to support it achieve these objectives. At present VICs in NI are subject to a Tourism NI mid-term review of visitor information and given this changing context and the development of the strategic vision contained in this tourism plan, it is timely to consider the future role and effectiveness of VICs. Collaboration between and sharing of VIC management practices, greater product awareness, working with the tourism trade locally and an unambiguous focus on digital marketing and delivery of information to visitors through technology, are important considerations.

Actions

The following actions will ensure that the destination management philosophy is adopted by the Council, its stakeholders and the tourism trade in Mild Ulster to ensure the quality of visitor experience is at the requisite level for a competitive destination:
1. Develop strong working relationship with the tourism trade to generate its commitment to the strategy and to quality and service standards necessary for Mid Ulster to be a competitive destination. We recommend the establishment of a Council/stakeholder/trade Tourism Development Group, the role and remit of which are outlined below (see section 5.1 below).

2. Strengthen collaboration and partnerships between Mid Ulster Council and stakeholders whose engagement and commitment are necessary for the successful delivery of tourism in the area.

3. Redefine the role of the Visitor Information Centres and their relationship with the tourism industry, to ensure that they support the tourism trade and help raise quality standards. Additional functions to include marketing of the area, social media, trade engagement and communication.

4. Align all non-tourism services and functions of the local authority to support tourism development and growth – these to include business and skills development; regeneration; planning and physical development; investment promotion; arts and leisure, sport and outdoor activities.

5. Support the development of Mid Ulster as a World Host destination. Review additional skills required to support Council staff to work with Tourism Ireland and the travel trade. Include social media delivery as part of the brief for VIC staff.

4.4   Promoting Mid Ulster for Tourism

Mid Ulster suffers from a comparative lack of distinctiveness in tourism destination marketing terms, with implicit limitations on market visibility and appeal and significant implications on how to develop the product proposition(s) and market them. However, an important strength is that Mid Ulster is located within an hour's drive of Northern Ireland's significant tourism regions – Causeway Coast, Fermanagh Lakes, Belfast and cross border destinations of Donegal and Monaghan[22]. This strategic location, in the heart of NI, presents opportunities to develop and promote tourism.

Developing tourism in Mid Ulster and raising its economic contribution is dependent not only on the development of tourism products (which shape the way in which visitors will relate to the destination) and effective destination management, both outlined above, but also on positive marketing of the destination.

There are several dimensions to marketing the destination:
• The need to establish the tourism strands and products detailed above – Seamus Heaney, Outdoor Activities and History and Heritage;
• Ensuring the quality of the welcome and service standards are high;
• Ensuring that the tourism trade and the public and other stakeholders work together to deliver a successful destination;

• Generate common agreement to the vision and consequent marketing and making sure there is public/private commitment to the marketing;
• Making sure residents of Mid Ulster understand the quality of the tourism experiences and assets in the area, so that they act as ambassadors for the destination (e.g. with friends and family).

Somewhat counterintuitively, this strategy is explicit about the focus of marketing and promotion to local residents, as well as residents of NI and out-of-state visitors[23]:
• **Local residents** – while they will be day trippers and will not spend a lot, it is necessary to influence them to encourage friends and family to visit (for the experiences offered) and to keep them advised of the importance of tourism to the area. They will also be influential to the quality of welcome received by visitors;
• NI residents – many will be day visitors too, but it is important to raise the profile of Mid Ulster for tourism, and of the tourism experiences/products on offer and encourage changed behaviour, to visit the destination;
• Out-of-state visitors will come from a variety of originations with different characteristics and motivators. (Great Britain, Germany, France and North America are the priority originations.)

The following figure highlights the target segments, based on Tourism Ireland and Tourism Northern Ireland's market analyses. A table with detailed motivators to visits is included in the appendices.

Mid Ulster Market segments

NI & ROI
• Time Together
• Mature Cosmopolitans
• Family Fun
• Young and Lively (ROI only)

Great Britain, Germany, France, North America
• Social Energisers
• Culturally Curious
• Great Escaper

Niche Segments
• Literary Tourism
• Ulster Scots
• Travel trade
• VFR[24]

The marketing of the Mid Ulster area requires:
1. Agreement on the branding to underpin the way the destination is promoted and perceived;
2. A marketing strategy which is adaptable to changed market conditions, allows individual attractions and businesses to market themselves and reinforces the attributes and product experiences across the whole destination; and
3. A marketing plan to which all stakeholders align and commit.

Branding

The development of a collective "Mid Ulster" tourism brand will not in itself generate traction, brand recognition or a compelling proposition for the visitor. Nor will it raise awareness about the products and experiences available in Mid Ulster, nor do justice to the alternative proposition of positioning the three key products – Seamus Heaney, Outdoor Activities and History and Heritage – as the main attractors. These would be supported by other lower ranked products, town and villages, experiences, events, food and the natural assets such as loughs, rivers, countryside etc.

Thus, each of the three priority tourism products should be branded and their brands used to underpin their marketing and promotion.

The core (product) brand promises used in marketing are not designed to exclude the other product brands, but to identify how variously the Seamus Heaney, Outdoor Activities and History and Heritage visitor experiences will work, each working to maximise visitor opportunities for their own specific product area. They will of course each be targeted at their priority markets, which while not mutually exclusive, are likely to have limited overlap.

Despite the comments above, there is still a rationale for including Mid Ulster consistently in the product brands, using it as a lower ranking component in the branding of the products – to increase recognition of the Mid Ulster identity, both locally (for residents) and for NI markets.

The recommended way to do this follows:
1. A brand architecture should be developed around the three core Mid Ulster product experiences (Seamus Heaney, Outdoor Activities and History and Heritage). These brands should be designed to underpin the marketing of each product. The brand design exercise should build on a strong understanding of the region's key strengths and core appeals and how these meet visitor segments and needs.

2. Mid Ulster should be used consistently as a subservient component (e.g. strapline) on all marketing in NI and the Republic, to increase recognition and understanding of what is on offer in the area. It is less relevant for the strapline to be used in further off out-of-state markets.

3. The three product brands should be seen to come from the same "stable", to support mutual reinforcement and help visitors understand what else there is available to do in the area.

4. A brand design exercise should be undertaken, working with representatives and stakeholders within each core product.

Marketing Strategy

The marketing strategy should use the agreed brands and will determine key markets (for each core tourism product for Mid Ulster). It will set the 3 to 5 year timeframe under which the marketing action plan will be implemented. It therefore has to be adaptable and be able to respond to changes (in currencies, market conditions etc.)
Target markets for each core product, based on Tourism NI and Tourism Ireland data, will be as follows:

1. Seamus Heaney Experiences	• Mid Ulster residents and NI residents • Educational market • Other Seamus Heaney exhibitions and events[25] • Literary tourists • Alignment with other literary centres throughout Ireland • Literary trails and itineraries • Travel trade • Culturally Curious (GB, Germany etc.) • Mature Cosmopolitans (NI and ROI)
2. Outdoor Activities	• Mid Ulster residents and NI residents • Active walkers, cyclists, canoeists etc. • Multi activity centres and activity operators' markets • Time Together (NI and ROI) • Family Fun (NI and ROI) • Young and Lively (ROI only) • Social Energisers (GB, Germany etc.) • Culturally Curious (GB, Germany etc.) • Great Escapers (GB, Germany etc.)

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25   As planned in e.g. Dublin

3. History and heritage	• Mid Ulster residents and NI residents
	• Time Together (NI and ROI)
	• Mature Cosmopolitans (NI and ROI)
	• Family Fun (NI and ROI)
	• Young and Lively (ROI only)
	• Social Energisers (GB, Germany etc.)
	• Great Escaper (GB, Germany etc.)

Marketing Plan

The marketing plan will be an annual programme of activities focused around budgets, the key markets (defined in the strategy) and routes to market. It will be promoted to the tourism trade to generate its buy-in to joint marketing activities. A key annual target will be the travel trade who determine itineraries for visitors[26]. Equally, the focus on digital media and social media should supersede all efforts at print for destination marketing and arguably (consumer) exhibition attendance for promotions.

The annual plan should be agreed with the local tourism trade, through the proposed Tourism Development Group, in order to get endorsement and support buy-in to collective marketing.

Actions

1. Commission the development of a brand architecture for the three core tourism products for Mid Ulster, working with relevant stakeholders to generate their support and commitment. Communicate brand guidelines to tourism trade.

2. Develop marketing strategy and plan for domestic (NI) and out-of-state marketing. Prepare digital and social media plan.

3. Agree campaign to inform Mid Ulster residents of tourism's role and assets.

4. Establish and develop working relationships with Tourism Ireland for inclusion of Mid Ulster product in off-island marketing.

5. Work with the tourism sector in Mid Ulster to generate alignment of their marketing and promotion with the strategic direction agreed. Consult and seek the support of the putative Tourism Development Group to the marketing strategy and annual plans. Need to:
• Encourage tourism operators to participate in campaigns
• Work with stakeholders – especially e.g. National Trust, Department for Communities - to agree common objectives and involvement in marketing campaigns

6. Develop relationships with the travel trade and encourage and support them to package Mid Ulster product for their clients. (Market research needed to identify most appropriate tour agents etc.)

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26   And whose timescale is 18 months to 2 years ahead in planning and marketing itineraries

4.5 Dispersal of Visitor Spend and Supporting Local Communities

There's a twofold importance to this strategic strand – to ensure that visitor spend and benefit is spread throughout Mid Ulster and to support local communities play their role in accommodating and welcoming visitors.

The issue of local communities' tourism roles is profound. There is a tension between sustaining the identities and attractiveness of individual communities, towns and villages for residents and visitors, while reinforcing the role and identity of the whole of Mid Ulster. In section 4.4 above, the Mid Ulster identity is proposed as being projected as a subservient strapline (or similar) in the design architecture for the three priority tourism products.

Meanwhile, local communities are proud of their identities and their role in tourism. Because the Outdoor Activities and Archaeology, History and Heritage, and to a lesser extent the Seamus Heaney, tourism products and experiences are dispersed across the Mid Ulster region, it is important to ensure that visitors are motivated to visit and spend within these diverse communities. However, the tourism "offer" within each town and village must be decipherable, promoted and understood by potential visitors. The identity, quality of public realm, quality standards, food available etc. within each community are important, to ensure that visitors know to visit and are welcomed.

This necessitates a local regeneration approach within each community, which in turn requires (tourism) trade and community involvement in determining local priorities and the management of visitors – what they visit, how directed, what's the interpretation or orientation like, opening hours etc.

Dispersing visitors across the district means that their access to information and understanding of what authentic products and experiences are available in each place must be articulated. This is an added, but crucial, dimension to developing the priority tourism products and to marketing and promotion of these products. Local itineraries, places to visit, the local setting or context for outdoor activities or heritage sites, where to visit next etc., all need to be articulated, while the distribution channels need to be defined, with due attention paid to broadband quality, digital and social media, local print distribution etc.

Such strategies are important in increasing visitors' length of stay and improving visitor yield. Well-placed and attractive directional, place-making and interpretive signage will facilitate visitors' awareness of all that Mid Ulster has to offer. It will also assist in enticing repeat visitation.

Actions

These comprise:

1. Inclusion of local facilities in the articulation of tourism product for Mid Ulster – including itineraries, places to visit, things to do, clusters of attractions.

2. Marketing and promotion of the tourism priorities should include key "hubs" around which outdoor facilities or history and heritage product are clustered.

3. Develop packages, bundles and itineraries of things to do and places to visit to encourage visitors to experience the best the destination has to offer.

4. Develop a toolkit for use by local communities to assist them develop and exploit their local identities and tourism assets. The toolkit might include: getting people together; projecting local identities; branding and marketing guidelines; things for visitors to do; running events; access to funds etc.

5. Council to support local communities through business engagement and review of local regeneration priorities, including helping local clusters to set up and operate.

5 Implementation

This section addresses issues associated with the implementation of the strategy and action plan. The detailed action plan is contained in the appendices. Key items addressed here are:
- Setting up the Tourism Development Group
- Role of the local authority
- Measuring performance (KPIs)
- Risk Analysis

5.1 Tourism Development Group

Destinations only succeed when public and private sectors work together and the wider community commits to tourism. The legacy councils that make up Mid Ulster Council each communicated with the local tourism trade. The Flavour of Tyrone group provides an effective and enduring public/private partnership, with successes in place including business marketing, promotion and developing and sustaining quality standards.

The establishment of Mid Ulster District Council and the focus on the three tourism priorities now necessitate a new approach to partnership, building on previous success. The need for this is prompted by:
• The renewed focus on three tourism strands or priorities which business operators[27] need to align with;
• The establishment of a new brand architecture, marketing strategy and annual marketing plans which need to be endorsed and committed to by the tourism trade, so their own marketing aligns and reinforces, including generating operator collateral in marketing campaigns;
• A new focus on working with Tourism Ireland, Tourism NI and the travel trade, to ensure Mid Ulster tourism product is placed out-of-state and off-island and is included in travel trade itineraries for their customers and clients;
• The geographical breadth of Mid Ulster and the stated objective of supporting local communities (and the tourism trade within them) to firmly establish their identities and role in welcoming visitors;
• The dependence on a number of other stakeholders – Tourism NI, Forest Services, Department for Communities, National Trust, Lough Neagh Partnership, Waterways Ireland etc. – in developing, articulating and promoting the tourism priorities for Mid Ulster.

The formality of partnership arrangements is proposed through a four tiered approach:

1. The establishment of a Tourism Development Group, to which the local authority, operator representatives and key stakeholders are invited to be members[28]. Leadership from the local authority and trade is required at the highest

level. The main roles of the Group would be to:
• Help set the tourism priorities for the area;
• Comment on and contribute to the thinking behind the branding, marketing, annual marketing plans and product development opportunities across the area;
• Help generate operator contributions to such thinking and marketing delivery, including generating collateral for campaigns;
• Support partnership arrangements locally (within Mid Ulster and NI) and with Tourism Ireland and the travel trade;
• Act as ambassadors for the area in all matters relating to tourism.

2. Flavour would develop as an organisation to be Mid Ulster wide, supporting business engagement and communication, raising quality standards and ensuring the food and hospitality dimension to the destination are maintained. It should be renamed Flavour of Mid Ulster[29].

3. Clusters of operators would be encouraged, aligned to the main tourism products and to the needs of individual communities, towns and villages. Support should be on offer from the local authority.

4. The VICs' role in business engagement and communication would be formalised with regular enews, emails, information exchange and when appropriate business and skills training support.

The Council has from the outset committed to engaging with and working with tourism operators across the area. Other roles and functions of the local authority are developed in the next section below.

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27   We include voluntary and community owned tourism operations within this definition
28   The Tourism Development Group would not substitute for the regulatory and budgetary functions or decisions that are within the remit of the local authority
29   This would need to be determined and agreed upon by the members, since it is an independent organisation

5.2   Role of the Local Authority

While playing a pivotal role in strategy and delivery of product development and marketing plans, the local authority has statutory functions and staff responsibilities and can allocate capital and operational (revenue) budgets to tourism. The proposal to establish and formalise the Tourism Development Group and engage and communicate with tourism operators does not negate the task the authority has of making its own decisions about resources and staff. The Tourism Development Group would assist with consultations and generating support from the tourism trade.

There are a number of other roles the local authority must play to support tourism growth:

• Tourism staff will support product development, events management, business engagement and communications and will lead on marketing and promotions;
• VIC staff need to play a strong role in supporting implementation of these functions. (We anticipate that enhanced skills training will be required to e.g. ingrain working with the travel trade and Tourism Ireland, develop and consistently deliver social media and digital campaigns, etc.);

• The brand architecture and complementary development and strengthening of local communities and their identities will require support from communication staff within the local authority;
• Regeneration, planning, countryside access skills will be required to facilitate product development and local regeneration, of which Bellaghy is an example (see section 4.2.1 above);
• Business development is necessary to support operators, either independently or in clusters, to innovate, be more efficient, gain skills etc.
• Arts, culture and leisure functions add important components to the tourism product and things for visitors to do (in addition to the lead on the development of the Seamus Heaney experience and contributor to the Outdoor Activities and Archaeology, History and Heritage tourism priorities);
• The local authority needs to lead on:
     o Negotiation with stakeholders on their role and contribution to the delivery of tourism for the area;
     o Advocacy and lobbying on key issues, including resources, traffic improvements, broadband coverage[30] etc.

5.3   Measuring Performance

Overall performance of the visitor economy can be assessed through tourism data, measuring overnight trips made by Northern Ireland residents and visitors from outside Northern Ireland. Derived from a variety of sources, information is published by the Northern Ireland Statistics and Research Agency (NISRA). There are issues about the district wide accuracy of this data, due in part to modest sample sizes and to disaggregating NI-wide information to local areas. Equally, many venues and sites have limited visitor surveys, so who visits, when and where they come from is unknown or can only be guessed at.

Key measurable outputs in assessing performance include:
•   Number of trips
•   Length of stay
•   Number of overnight stays
•   Spend
•   Origin of visit
•   Reason for visit
•   Levels of satisfaction

The table below catalogues the KPIs and growth targets

5.1   Tourism Development Group

Measuring Performance

Baseline (2015)	Measures of Future Success and source of data
3 legacy councils with own tourism programmes and systems	Commitment by Mid Ulster Council to tourism as a strategic priority and economic driver
Existing communications from LAs to tourism trade sporadic and not consistent No formal public/private partnership, other than Flavour	• Establishment of an effective Tourism Development Group • Consistent and regular engagement and communications with the trade • Effective business engagement and communications • Role of Flavour developed and organisation well established (with growing membership) (Source: internal Council assessment and tourism trade views)
Marketing strategy and plan	New brand architecture, marketing strategy and annual plans agreed with and used by operators (Source: Council assessment)
Limited out-of-state marketing and work with travel trade	Proportion of marketing budgets allocated to NI, ROI and out-of-state to be agreed (Source: Council assessment)
Advocacy for the sector is currently ad hoc	Preparedness of LA to be advocate for the sector (Source: internal Council assessment and tourism trade views)
£26.6m p.a. expenditure by visitors on overnight trips, 2014 (= 4% of NI total)	• The value needs to be confirmed because of wide variations in NISRA estimates (£86m in 2013) • double value of overnight stays to £50m by 2021 (Source: NISRA)
213,740 trips and 622,114 overnights in 2014 (4% of the NI total)	Increase number of trips and overnight stays by 14% p.a. to 2021 (Source: NISRA)
Number of people employed in the sector, currently 3,165 jobs (2013)	Sustain existing level through 2015/16 and 2016/17 and 2% p.a. growth thereafter (Need also to evaluate sustainability and full or part time character of jobs) (Source: NISRA)
Stakeholders' commitment – base line needs to be established.	Value of stakeholders investment and commitment to be evaluated by LA (Source: Council assessment)
New business formation	To be agreed in the future (Source: Council)

5.4   Risk Analysis

The purpose of the risk analysis is to identify what would happen if the Tourism Strategy and associated actions are not implemented or resourced.
We identify the major risks as follows:
- •   Risk of the local authority failing to integrate tourism functions across all services
- •   Risk of failure of the Council to engage and communicate with tourism operators
- •   Risk of failure to embrace and undertake the out-of-state and travel trade marketing roles
- •   Risk of not communicating with residents about the importance of tourism
- •   Limits on resource allocation to deliver strategy
We catalogue the risks and how to address or ameliorate them below

Risk Analysis

Risks	Actions to Address Risks
Risk of the local authority failing to integrate tourism functions across all services • Tourism strategy and actions not given high enough priority by the LA • Departmental failure to integrate tourism within full range of economic and other services	• Council commitment must be generated, potentially seeking Tourism NI support to encourage Council to prioritise tourism • Enlist stakeholders' (including the tourism trade) commitment and support to identify way forward • Brief senior managers to enhance their commitment to tourism
Risk of failure of the Council to engage and communicate with tourism operators • Failure to establish Tourism Development Group • Failure to generate match funding commitments to marketing activity • Failure to generate confidence in the Council's tourism leadership results in fragmentation of the tourism sector, which ultimately leads to lower levels of performance	• Must engage and communicate with the tourism trade • VIC staff and tourism managers to design this component as a matter of priority • Establishment of a Tourism Development Group, to represent operator interests, as a high priority, with exchange of views on delivery of tourism across the LA area • Identify potential leaders and influencers to talk to peers in the sector
Risk of failure to embrace and undertake the out-of-state marketing and travel trade communication roles • Focus on domestic (NI) visitation will result in lower level of out-of-state visitors and lower levels of income	• Immediate review and agreement with Tourism Ireland about the role of the Council and the activities/priorities in out-of-state marketing • Agreement on role the tourist trade in the area can play in out-of-state marketing • Skills development of Council staff to take on this role effectively
Risk of not communicating with residents about the importance of tourism •Failure to advocate tourism's importance and opportunities to residents • Potential loss of the VFR market	• Annual campaign to residents to be built in to Council communications to home owners, businesses and residents • Occasional news stories required • Residents as potential markets for events and arts and sport activities
Limits on resource allocation to deliver strategy • Risks to delivery of the strategy in its entirety • Risks to delivery of specific components (e.g. marketing campaign)	• Prioritisation of strategy components for resourcing/implementation • Negotiate with other stakeholders for funding commitments

6 Next Steps

The next steps for development and implementation of the tourism strategy and action plans follow:

Next Steps

No	Action	Who?	Timescale
	Agree the Tourism Strategy and Action Plan, 2016 – 21, including presentation to the tourism trade	All	July/August 2016
	Set up the Tourism Development Group, identifying operator, stakeholder and Council representation	Council, with stakeholders	July – October 2016
	Prepare the brief for the new brand architecture to define the tourism products/propositions and relationship to the Council's branding. Include stakeholder workshop. Commission designers to prepare brands	Council and stakeholder	March-June 2017
	Prepare the marketing plan for the area and the 3 tourism products, with digital marketing being central	Council and stakeholders	October onwards
	Define the business development interventions to enhance the competiveness of operators across the area	Council, with TNI and INI	August –ongoing
	Develop the industry engagement and communication programme, including mechanisms for clusters aligned to the major product opportunities and for local hubs	Council	Ongoing
	Develop and deliver communication campaign to residents	Council	September onwards
	Establish the baseline for KPIs	Council/NIRSA	July onwards
	Working with TNI and NISRA to determine what surveys are undertaken and agree the research work required to generate and monitor tourism performance	Council, TNI and NISRA	Autumn 2016
	Review landscape management arrangements in the Sperrins with other local authorities and interested stakeholders	LAs	Ongoing

Appendices

The second volume of appendices include:
- Policy context
  - o   Mid Ulster context
  - o   Tourism in a NI context
- Tourism trends
- Outdoor Activity market
- Report on survey of the tourism trade
- SWOT analysis
- Sperrins Actions
- Sources
- Consultations

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Mid Ulster Tourism Strategy

Action Plan

The Action Plan is a working tool for Tourism Strategy implementation.
The implementation process may vary over time in response to new opportunities to secure funding, the level of support and commitment from stakeholders and relevant policy changes at all levels of government. The lead stakeholders identified in the Action Plan are therefore indicative only and the final list of stakeholders implementing a particular action may vary. The Action Plan is organised into the five themes each with strategy actions, tasks and priorities.

Time scales
1. Covers the period April 2016 – March 2017; 2. Covers the period April 2017 - March 2018; 3. Covers the period April 2018 – March 2019; 4 covers the period April 2018 – March 2020; 5 covers the period April 2020 – March 2021

Partners
MUDC = Mid Ulster District Council; TDG = (the new) Mid Ulster Tourism Development Group; PS =Private Sector; TNI =Tourism Northern Ireland; TI = Tourism Ireland; ONI= Outdoor NI; DfC = Department for Communities

Funding
Funding for the delivery of the action plan will come from a number of sources, including EU programmes, Tourism NI and Tourism Ireland, private sector, Council core budgets and other funding that is identified and becomes available over the period of the strategy and action plan.

Strategic Themes - Key Actions	Lead	Partners	Time Scale
1. Seamus Heaney Seamus Heaney HomePlace Actions: • Develop and implement a marketing and communications plan, to include engagement with the tourism trade, Tourism Ireland, Tourism Northern Ireland and the travel trade • Develop a year round Heaney experience events programme • Develop a strong digital platform for the HomePlace, including social media • Integrate marketing of the Heaney experience into the visitor marketing for the area (see below) • Work with other literary centres to develop an all-Ireland literary experience	MUDC	TNI, TDG, PS	1-5
2. Tourism operators' own marketing and service plans: review by each business of their plans to see how to integrate with the Heaney proposition	TDG	PS, TNI MUDC,	1 -5
3. Business collaboration and networking: support for operators to cluster and develop new product, services and experiences for visitors	MUDC	TDG, TNI, PS	1 -5
4. Skills development and mentoring: World Host training: • For tourism businesses, linked to the Heaney experience • For all operators in Bellaghy	MUDC	TNI, TDG, PS	1, 2
5. Working with the local tourism trade: the HomePlace to collaborate on marketing, promotion, events, new products etc. with the tourism trade	MUDC	TDG, PS	1 -5
6. Bellaghy village renewal: prepare, consult and implement a public realm plan to enhance the quality of the environment for visitors and residents	MUDC	TNI	1 -3
7. Seamus Heaney trails: complete the design and implementation of the trails to celebrate Heaney's literature and legacy 2: Archaeology, History and Heritage	MUDC	TNI	1-3

Archaeology, History and Heritage

	Lead	Partners	Time Scale
8. Establish unifying heritage and history tourism theme: •　　To position Mid Ulster as a centre of excellence for history and heritage •　　Tie into the branding for the area (see action 26 below) •　　Develop compelling archaeological, historic and heritage tourism proposition for visitors	MUDC	TDG, TNI, DfC	1 - 3
9. Heritage Lottery Fund: following feasibility study, integrate landscape management with historic sites in Lower Sperrins and at Lough Neagh, with HLF support	MUDC[31]	DfC	1 - 5
10. Itineraries: develop a series of itineraries for visitors, to encourage dispersal	MUDC	TDG, PS	1 - 5
11. Events: develop a year round programme of events linked with historic venues to generate profile and attract visitation	MUDC	TDG	1 - 5

Outdoor Activities

	Lead	Partners	Time Scale
12. The Outdoor Activity product: pull existing and potential new sites and facilities under the one umbrella for the visitor, tying into the planned branding for the destination (see action 26 below)	MUDC	TDG, TNI, ONI	1, 2
13. Position Mid Ulster as a centre of Outdoor Activity excellence: marketing plan to develop proposition and promote to visitor markets	MUDC	TNI, TDG	1 - 5
14. Physical development priorities: •　　Programme to develop sites, trails and village/facility hubs •　　Prioritise Parkanaur, Knockmany, Drum Manor and Favor Royal forest parks for improvements •　　Marketing, interagency collaboration and cluster development with operators including activity tourism operators	MUDC	ONI, TDG, PS	1 - 5
15. Outdoor activity events: develop and deliver year round programme to generate profile and attract visitation, including the Dark Skies project	MUDC	TDG	1 - 5
16. Camping and caravanning: identify and develop specific sites, with stakeholders and private sector	MUDC	Forest Services	1 - 3
17. Countryside access: focus to address countryside access and negotiate more and better access for activity tourists, e.g. in the Blackwater Valley and the Sperrins AONB	MUDC	ONI	1 -5

Tourism as an Economic Driver

	Lead	Partners	Time Scale
18. Adoption of the tourism strategy: Adoption of and commitment to this strategy and the associated actions by the local authority	MUDC	TNI, TDG, PS	1
19. Generate support of the tourism trade, through: •　　An agreed engagement and communications plan with the trade •　　Set up the Tourism Development Group (see action 21 below)	MUDC	TDG, PS	1, 2
20. Generate support of stakeholders, through: •　　Communication and engagement plan with agencies and stakeholders •　　Communication plan with residents to promote the importance of tourism (requires a sustained programme of communication)	MUDC	TNI	1 - 5

Destination Management

	Lead	Partners	Time Scale
21.Tourism Development Group: set up policy orientated Tourism Development Group with the tourism trade, stakeholders and Council (see action 2 above)	TDG	MUDC, TNI	1

31　　Plus Fermanagh and Omagh District Council for the Lower Sperrins Heritage project

Tourism Strategy and Action Plan

	Lead	Partners	Time Scale
22. Collaboration and partnerships with the tourism trade: Council and tourism trade to communicate and engage, to establish strong working relationship for product development, marketing and quality of visitor welcome	TDG	MUDC	1 - 5
23. Visitor Information Centres: redefine the role of VICS and their relationship with the tourism industry; functions to include: • Trade engagement and communication • Access to skills development • Help raise quality standards • Support marketing of the area and continuous social media presence Review skills required to support VIC staff to work with tourism Ireland, the travel trade and deliver social media	MUDC	TNI	1 - 2
24. Mid Ulster Council: align all non-tourism services and functions of the local authority to support tourism development and growth (e.g. business and skills; regeneration; planning; arts and leisure, sport and outdoor activities	MUDC		1 - 5
25. World Host: develop Mid Ulster as a World Host destination (see action 7 above).	MUDC	TDG, PS, TNI,	1, 2

Promotion of Mid Ulster for Tourism

	Lead	Partners	Time Scale
26. Branding: commission the development of a brand architecture for the three core tourism products, including communicating agreed brand guidelines to tourism trade	MUDC	TDG, PS, TNI,	1, 2
27. Marketing strategy and plan: develop marketing strategy and plan for domestic (NI) and out-of-state marketing, including digital and social media components	MUDC	TDG, TNI,	1 - 5
28. Local residents campaign: to inform Mid Ulster residents of tourism's role and assets (see action 3 above)	MUDC		1 - 5
29. Tourism Ireland and Tourism Northern Ireland: develop working relationships with TIL and TNI for off -island marketing of Mid Ulster tourism products	MUDC	TDG, PS	1 - 5
30. Tourism trade: work to align tourism operators' marketing and promotion with the brand and agreed strategic direction: • Gain support of the Tourism Development Group to the marketing strategy and annual plans • Encourage tourism operators to participate in campaigns • Work with stakeholders – especially e.g. National Trust, DfC - to agree common objectives and involvement in marketing campaigns	TDG	MUDC, PS,	1 - 5
31. Travel trade: work with travel trade to encourage inclusion of Mid Ulster product for their clients	MUDC	TDG, PS, TNI,	1 - 5

Dispersal of Visitor Spend and Supporting Local Communities

	Lead	Partners	Time Scale
32. Local facilities: develop itineraries and clusters of facilities to encourage dispersal of visitation across Mid Ulster	MUDC	TDG, PS, TNI,	1 -5
33. Local hubs and regeneration, through: • Develop plans and investment programmes for village hubs around which outdoor facilities or history and heritage product are clustered • Support for local clusters of tourism operators • Develop a toolkit for use by local communities to assist them develop and exploit their local identities and tourism assets	MUDC	TDG, PS	1 -5
34. Itineraries: develop packages, bundles and itineraries to encourage visitors to experience the best the destination has to offer	MUDC	TDG, PS	1,2

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