

Armagh City, Banbridge and Craigavon Borough Local Development Plan



**Paper 7 : Tourism
December 2015**



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PURPOSE:

- **To provide the Planning and Regulatory Committee with an overview of Tourism and implications for Tourism Development in the Armagh City Banbridge Craigavon Borough Plan 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 NI and within ABC and an overview of their related strategies and plans.**
- III. An overview of tourism policy within current Area Plans, Masterplans and Development Strategies.**
- IV. An overview of tourism in Northern Ireland and consideration of the tourism sector within ABC Area**
- V. Conclusion and key findings.**

1.0 Introduction

- 1.1** The aim of this paper is to inform members on the issues regarding the tourism sector in Armagh City, Banbridge and Craigavon Borough which will assist the Council in the development of their plan Strategy. It outlines current tourist demand and potential growth areas and those assets that should be safeguarded.
- 1.2** The paper allows members to commence consideration of the priorities for formulating a sustainable tourism policy to grow tourism in a manner which, in line with the Regional Development Strategy, balances the economic benefits of tourism with the environmental and social impacts.
- 1.3** Tourism is recognised as the world's fastest growing industry, encompassing a very wide range of activities including travel and visits for business, professional and domestic purposes as well as for holidays and recreation. In 2013, the World Travel & Tourism Council (WTTC) estimated that the industry contributed 9.5% to the global economy and continues to outperform the wider economy in terms of economic growth (3% vs 2%). In 2013, tourism contributed 6.6% to the Northern Ireland economy equating to £722.1m and supporting 67,282 jobs across the province (NISRA 2014).

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** 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 aims to protect and enhance the environment for current and future generations. The RDS recognises tourism as a key element underpinning sustainable economic growth in NI. 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:

- **RG2 – Deliver a balanced approach to transport infrastructure** (Maximise the potential of the Regional Strategic Transport Network) recognises the importance of accessibility to facilitate tourist travel including access to key tourism sites and where possible lessen unsuitable traffic??? Armagh, Banbridge and Craigavon with its central location is ideally suited as a stop- off point or base for undertaking visits to various destinations in the region and the Republic of Ireland.
- **RG4 - Promote a sustainable approach to the provision of tourism infrastructure** - Promoting a balanced approach that safeguards tourism infrastructure, improving facilities for tourists while benefiting society and the economy.
- **RG11 - Conserve, protect and, where possible, enhance our built heritage and our natural environment** - which are key assets for attracting tourism and would continue to make a valuable contribution to our Tourism economy, as well as to the wider environment and society.

2.3 The RDS recognises the service centres of Craigavon Urban Area (incorporating Lurgan, Craigavon Centre and Portadown), Armagh and Banbridge and their position as a cluster with Armagh City and Lough Neagh providing unique opportunities in the tourism sector. In addition, Lough Neagh is recognised as a “Strategic Natural Resource” within the rural area. It also recognises Armagh’s potential for tourism development relies upon strategic road improvements around the city.

2.4 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).

2.5 The RDS has identified Lough Neagh as a strategic natural resource 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. One Signature Project (St Patrick’s Trail) is located within the Council Area.

(f) Strategic Planning Policy Statement

2.6 In preparing Local Development Plans the SPPS states that Councils shall bring forward a tourism strategy, together with appropriate policies and proposals that must reflect the aim, objectives and policy approach of the SPPS, tailored to the specific circumstances of the plan area. Such a strategy should reflect wider government tourism initiatives and should address 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.

- 2.7** 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.
- 2.8** 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 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.

(b) Existing Planning Policy Statements

- 2.9** Planning Policy Statement 16 (PPS16) Tourism was published in 2013 will remain a material consideration until the Council has adopted its Plan Strategy. 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.

- 2.10** 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.
- 2.11** As discussed, the ABC Area benefits from access to one Strategic Natural Resource in the form of Lough Neagh. This area has numerous forms of site specific zonings and designations which seek to protect its distinctive qualities. Such protections are not solely centred on this area alone. Other areas throughout the entire Council 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.
- 2.12** 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.
- 2.13** 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. Like PPS 16, PPS2, PPS6, PPS8 and PPS21 will remain a material consideration where appropriate until the Council has an adopted plan Strategy.

3.0 Area Plans, Master Plans and Development Strategies covering Armagh Banbridge and Craigavon Area

- 3.1** The Area Plans for Armagh, Craigavon and Banbridge Newry and Mourne are the statutory plans for the Borough and provide the framework against which to assess development proposals. The main towns along with Dromore also have their own Town Centre Masterplan or development Strategy which were completed by the Department of Social Development (DSD) in conjunction with the local council and are 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/development strategy.

Armagh Area Plan 2004:

- 3.3** The Armagh Area Plan 2004 provides a planning framework for the growth and development of the Armagh area. One of the Plan's principal objectives was to encourage the development of the District's tourism potential however no specific plan policies with regards to tourism development were included.
- 3.4** At District level the Department endorsed the tourism strategy set out in the Armagh District Council's Tourism development Plan (1989). The Plan stated that the Department would co-operate with all interested parties and public agencies to highlight and develop tourism throughout the Plan Area balanced with the needs of environmental protection and conservation.
- 3.5** The physical regeneration of the centre of Armagh was identified as being an essential element in Armagh developing its tourism potential, the Plan endorsed 2 main physical development proposals for Armagh (The St Patrick's Trian and the development of the Shambles Market) which had been identified in the Council's Tourism Development Plan 1989. In addition the Plan stated that it would encourage other proposals within the central area that would add to the overall level of and quality of tourism facilities whilst paying regard to conservation whether these were to be initiated by the Council or any other body.

Armagh City Centre Masterplan

- 3.6** The Armagh City centre Masterplan (May 2009) which is currently under review sets out the blueprint for the future growth and investment in the city over the next 10-15 years and is informed by a detailed information gathering process and analysis. The information gathered for this study was wide ranging and identified the issues and opportunities and the analysis forms the foundation upon which the Masterplan

proposals are built. Armagh is a city of unparalleled significance in Northern Ireland. Its history and heritage form a strong identity and character which is one of the City's greatest assets and therefore must be conserved. The compact city centre has a historic urban form and a wealth of listed buildings, making it a special place to live, work and visit. Armagh faces challenges connected with the economic climate but also in balancing the needs of a modern settlement within an historic context. Its location at the heart of south-central Northern Ireland and close to the border should be viewed as an opportunity although congestion and poor traffic circulation has a detrimental effect on the functioning of the city centre and its environmental quality. The character of the city centre lends itself to niche retailers which should be encouraged. The centre has a number of development sites which have the potential to add to Armagh's character and economic growth. Such growth should seek to nurture its mixed use character so that retail units are complemented by a range of other uses including offices, residential and leisure facilities. The centre's recent transformation of public realm should be expanded to improve the gateways into the city.

3.7 The Masterplan sets out 5 regeneration objectives to enable Armagh City Centre to achieve its vision over the next 10-15 years and are highlighted below. This vision is that Armagh's well-maintained historic buildings, streets and spaces will provide the backdrop for a forward thinking City, with excellent amenities for its residents, provision for retail, business and enterprise and a welcoming environment for those who come to visit:

1. Enhance the quality of life for Armagh's residents.
2. Maintain and Enhance Armagh's historic character and identity
3. Develop a sustainable economy based on existing strengths.
4. Develop Armagh as a leading tourism destination
5. Develop a sustainable transportation network.

3.8 The Masterplan also identifies a range of projects and Development Sites – opportunities for change (including the Gaol, Ogle Street etc.) which will help achieve the objectives striving to ensure that the city centre is a safe, lively and attractive place to live, work and visit.

Craigavon Area Plan 2010:

3.9 The Craigavon Area Plan 2010 recognises that Tourism in the area is based on its easily accessible location in the heart of Northern Ireland, its natural land and water-based assets, its heritage features and the contribution of purpose built attractions. Lough Neagh and the River Bann were identified as the Borough's main natural features, with Craigavon Lakes providing 69 hectares of natural environment close to the urban centre. The Plan recognises that the tourism potential of the Borough is further enhanced by an extensive network of cycleways including the National Cycle

network and the Ulster Way and that although tourism can provide a number of economic and social benefits this should not be at the expense of its environmental assets.

- 3.10** The Craigavon Area Plan contains a designation and one specific policy related to Tourism Development;

Plan Policy TOU1 – The South Lake Zone: (which extends from south lake to Lake Road in the south and Eastway in the East).

The South Lake Zone is zoned to provide an attractive location for tourism, cultural, community, civic and recreational schemes to enhance the role and image of the central area and provide facilities for Borough residents and visitors. Within the Zone, two separate areas are designated, A and B. Within Area A favourable consideration will be given to proposals for tourism, recreational and cultural development and within Zone B favourable consideration will be given to proposals for tourism, cultural, community, civic and recreational development.

Craigavon Integrated Development Framework

- 3.11** The Craigavon Integrated Development Framework which is currently under review was published in 2010. Its purpose is to guide how the 3 town centres of Central Craigavon, Portadown and Lurgan will develop and thrive over the next 20 years and sets out a strategy for regeneration that will be pursued by the Department for Social Development and Craigavon Borough Council. The CIDF does not make specific reference to tourism but focuses on achieving an integrated vision for the “3C”- the 3 centres as the complete package which is that in 2020 the 3 centres of Portadown, Lurgan and Central Craigavon will be a focus for investment fitting for NI’s fourth largest urban area. It will have 3 complementary and successful centres all with a unique offer, each having a distinct role and identity and each benefiting from a greatly enhanced environment and range of facilities. Between the 3 centres there will be the complete range of commercial, social, cultural and community activities. The CIDF aims to project this vision through scores of individual actions, projects and development schemes that will strengthen each individual centre and contribute to the overall regeneration of Craigavon.

- 3.12** Recommendations have been made for each of the 3 Centres:

Central Craigavon:

- Development of town centre uses, with a focus on larger units and facilities that would not find a natural home in the traditional town centres
- Marketing sites in public ownership for daytime leisure and hotel use
- New transport links
- Improvements to the public transport network
- Improved pedestrian links

- Promotion and marketing of the centre as a place to invest.

Development sites were identified at lands situated between Central Way and Highfields, lands to the north and south of the Civic centre and lands to the west of Lakeview Road abutting Rushmere.

Lurgan:

- Redevelopment of key sites in Castle lane
- Physical improvements to the public realm, particularly along Market Street/High Street and towards Brownlow House and the park.
- Developing loose zones for 'shopping' in the middle of High Street/Market Street, 'relaxing' at the NW end and 'living and working' at the SE end.
- Refurbishment of derelict buildings for housing and community uses, living over the shop.
- Promotion of tourism, such as investigating the potential development of Brownlow house.

Other development sites were identified at lands situated between William Street and Ulster Street, The car park off Wesley Place/William Street, Johnston's Row car park and backlands, east end of High Street facing First Lurgan Presbyterian Church and lands to the SE end of Millenium Way.

Portadown:

- Redevelopment of key sites including a major riverside mixed use scheme, including housing, offices, hospitality, hotel and retail and service sector expansion on existing car parks.
- Clustering of 'evening economy' uses and cultural facilities in existing building close to the church as well as by the river.
- Physical improvements to the public realm.
- Developing a riverside green walkway.
- Vastly improving links across the Northway/railway.
- Public transport improvements including redevelopment of the station (already completed)
- Promotion of the watersports centre.
- Promotion of empty offices to public sector
- Car parking routes and signage project

Other development sites were identified at lands off Castle Street, the car park to the rear of Magowan West Shopping Centre, the car park to the rear of High Street Mall, Shillington Street car park, Shillington Street council depot, lands abutting Bridge

Street/Bridge Street south, car parks to the west of Meadow Lane, Ulster Carpets site and the RA Irwin & Co factory site.

- 3.13** The CIDF also contains an overarching strategy for transport and access and identifies various issues which should be addressed to create more sustainable transport patterns, including using public transport to connect the 3 centres for everyone.
- 3.14** Close partnership working is required between public bodies and the private sector to show that guided by CIDF the town centres can reach their full potential. Craigavon Integrated Regeneration partnership consists of elected members and officials from public and private bodies to assist in the implementation of the CIDF.

Banbridge, Newry and Mourne Area Plan 2015:

- 3.15** The BNMAP Area Plan 2015 was published in October 2013 and provides a planning framework for the growth and development of the Banbridge, Newry and Mourne Area. The plan's overall Tourism Strategy includes the promotion of the development of sustainable tourism. This means facilitating tourist development in suitable locations without adversely impacting on environmental and man-made assets which attract tourists. The Plan has not generally sought to designate local policy areas for tourism as proposals for tourism development will be considered in accordance with the prevailing regional policies. The plan offers no specific plan policies with regards to tourism development in the area, but also acknowledges that towns such as Banbridge and Dromore have a role to play as the best locations for new accommodation and facilities to serve signature Tourism projects such as the Mournes and St Patrick's Trail. Development Opportunity Sites have also been identified within towns where tourism and leisure development may be accommodated.

Banbridge Development Strategy 2009 - 2015

- 3.16** The Banbridge Development Strategy was published in July 2009 and identifies the key regeneration concepts, a coherent vision for the town and includes specific regeneration proposals for economic development, potential development sites, groups of buildings and environmental improvements.
- 3.17** An audit of the town centre was carried out as part of the Strategy to assess the key assets, resources and opportunities available to drive forward regeneration and build on the qualities which make Banbridge unique and an analysis was carried out of the strengths and weaknesses of the spatial structure of the town. The overall picture that emerged is of a relatively balanced and robust town with great potential to be more sustainable. Although a retail capacity study was not carried out the strategy highlights that the retail sector in the town centre faces competitive pressure from other

improving town centres like Newry and Lisburn and on line shopping. Independent retailers, who are an important part of the Banbridge distinctive retail offer have to continue to innovate and invest to remain competitive.

- 3.18** The Banbridge Development Strategy sets out the vision for Banbridge’s future. It states that Banbridge is a growing, thriving, well connected and managed market town with a robust economy that retains its individuality and because of the high quality of life, good leisure facilities, inclusive sense of pride, the positive committed business community and strong local culture in Banbridge people want to live, work and visit now and in the future. To achieve this vision and deliver the spatial development strategy, a series of 4 key themes have been established to repond to key challenges.
- Place Making and Mixed use: Investing in Town Centre
 - More Competitive Businesses
 - Effective Marketing
 - Leadership and Resources: Managing implementation

The development of opportunity sites will be a key driver to developing the multiple retail offer within the Town Centre. Of the 12 development opportunity sites identified in the Banbridge/ Newry and Mourne Area Plan 2015, four sites have been identified as the priority development sites in the Strategy. The priority sites have been identified on the basis that they have the greatest potential impact to improve the functioning and image of Banbridge and can fulfil the aims set out in the vision and wider strategy. These sites are located at Bridge Street/Gospel Lane, Gospel Lane, Townsend Street and Downshire Place/Scarva Street.

- 3.19** Another key theme is the ‘Greening of the town centre and connections’. This will include environmental improvements to foot paths, cycle routes and links to the river-side with the aim of strengthening strategic connections in the town centre in a sustainable manner.
- 3.20** The Development Strategy covers the period from 2009 – 2015 and is currently being developed into a Masterplan. Draft Proposals and Public Consultation has just been launched. The draft Masterplan contains 4 main objectives and associated strategic projects.
- Provide and attractive, accessible and viable town centre
 - Protect and enhance the town’s cultural, built and natural heritage
 - Create an enriched town centre experience by reinvigorating opportunity sites and the evening economy
 - Improve community, leisure and recreation services and facilities

3.21 The corporate plan 2015 – 2017 sets out a clear vision ‘to proactively build the economic prosperity of the area’, whilst recognising the importance of supporting infrastructure. It focuses its efforts around 3 corporate priorities of Place, people and Position where the aim is to ‘prosper the place, serve the people and strengthen our position’. Increasingly the tourism, hospitality and entertainment economy is one example of how the Council can ‘Prosper the Place’.

Regeneration and Development Strategy 2015-2020 (R&DS)

3.22 The Regeneration and Development Strategy (R&DS) for Armagh Banbridge and Craigavon Council was launched in 2015. The Council has placed the regeneration and development of the area as its number one priority. One of the headline messages of the R&DS is that there is a significant opportunity to develop tourism within the Council Area and it identifies that the challenge will be to increase the Borough’s tourism sector’s average spend per visit to equal the highest currently in NI.

3.23 Consultants Oxford Economics identified that the tourism sector in the Council Area was the worst performing of all the 11 new Councils and attributes its poor performance to the poor accommodation infrastructure across the region. It states that action to tackle this deficit of hotel provision is urgent and the Council will carry out an accommodation and tourism audit and then put in place an action plan and marketing strategy for the Borough. However, the R&DS also recognises that this in itself is not enough and the Council will also support the creation of new tourism based businesses outside the accommodation sector. The strategy identifies that the ABC area has to offer visitors memorable experiences and outcomes based on an innovative and holistic approach and should link the strong visitor experience to distinctive destinations such as Armagh and its St Patrick associations and Lough Neagh.

3.24 The R&DS puts forward examples of initiatives which would focus on the tourist’s experience and internationalising the profile of key attractors and events. These include:

- Investment in Innovation and creative talent to develop unique visitor experiences
- Establishing a programme of innovative visitor experiences that will transform the existing offerings into experiential products that will help develop new niche markets (such as TEFL, Science and Astronomy, Pilgrimages and choral groups)
- Actively pursuing appropriate designations to raise the profile of our key attractors in national and international markets eg World heritage site status for Navan centre & Fort)
- Creating a ‘rapid response’ and proactive team within the Council able to fast track tourism and other investments and planning applications by becoming THE local authority in NI that demonstrably wants and welcomes appropriate and sympathetic

tourism development more than any other – especially in terms of supporting new hotel and tourist accommodation development.

- Developing supporting tourism industries sector – evening economy, arts and crafts, languages, artisan food and supporting initiatives such as 2016, Year of Food
- Continuing to invest in Signature Events which have a proven track record of success and generating profile and significant economic benefits to position region and bid for international events.

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 ABC Tourism NI focuses ultimately on the two major natural assets of **Armagh** 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 ABC Area:

- Armagh
- Lough Neagh and its Waterways

- 4.4** A Destination Action Plan (March 2015) was developed by the former Armagh City and District Council. This plan is currently under review and will form the basis for any new Tourism Strategy which may be produced by the newly formed Council. The Destination Armagh Plan sets out a range of initiatives to grow Armagh's tourism potential from 2015 -2018 in partnership with all tourism stakeholders, with the aim of achieving a 3 – 5% annual growth rate in terms of economic performance. Its vision is for 'Armagh to be a standout short break, cultural destination with the island's oldest city at its heart; offering exceptional, innovative, visitor experiences comparable to the best in Europe'.
- 4.5** 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 ABC area however apart from the St Patrick's Signature Project there is little identified in the NI Tourist Board Corporate Plan 2011-15 for the Borough.
- 4.6** 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.
- 4.7** 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 Armagh Banbridge and Craigavon include Ballymoyer Forest, Carnagh Forest, Seaghan Forest which have limited facilities along with Gosford Forest Park and Loughgall Country Park which are used for a range of purposes including Camping and Outdoor Recreational Activities.
- 4.8** 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 considerably 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.

4.9 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.

4.10 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.

4.11 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.

4.12 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.

4.13 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

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.

4.14 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.

4.15 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.

- 4.16** 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.
- 4.17** 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 ABC 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.
- 4.18** Given the changeover to 11 super councils 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.
- 4.19** 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. Armagh is actively linked with Razgrad in Bulgaria and has implemented several successful initiatives including Armagh’s support for environmental improvements in Razgrad and assistance in formulating corporate, tourism and economic plans. Exchange visits have taken place and each year the Lord and Lady Mayor are invited to Razgrad’s Yoghurt festival.

- 4.20** There are various Development Associations and Regeneration Groups across the Borough which will have a role to play in regards tourism development. It is important that consultation takes places with these associations and groups.
- 4.21** 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 ABC Area, there are 2 National Trust held assets, including;

- The Argory: Argory estate and mansion, woods and walks along the River Blackwater.
- Ardress House

5.0 Northern Ireland and Armagh, Banbridge and Craigavon 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 Armagh, Banbridge and Craigavon 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 ABC has principally been the responsibility of the individual councils of Armagh City, Banbridge and Craigavon which have now amalgamated. 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 (DARD), Forest Service, Department of Environment (DOE) 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 Borough.

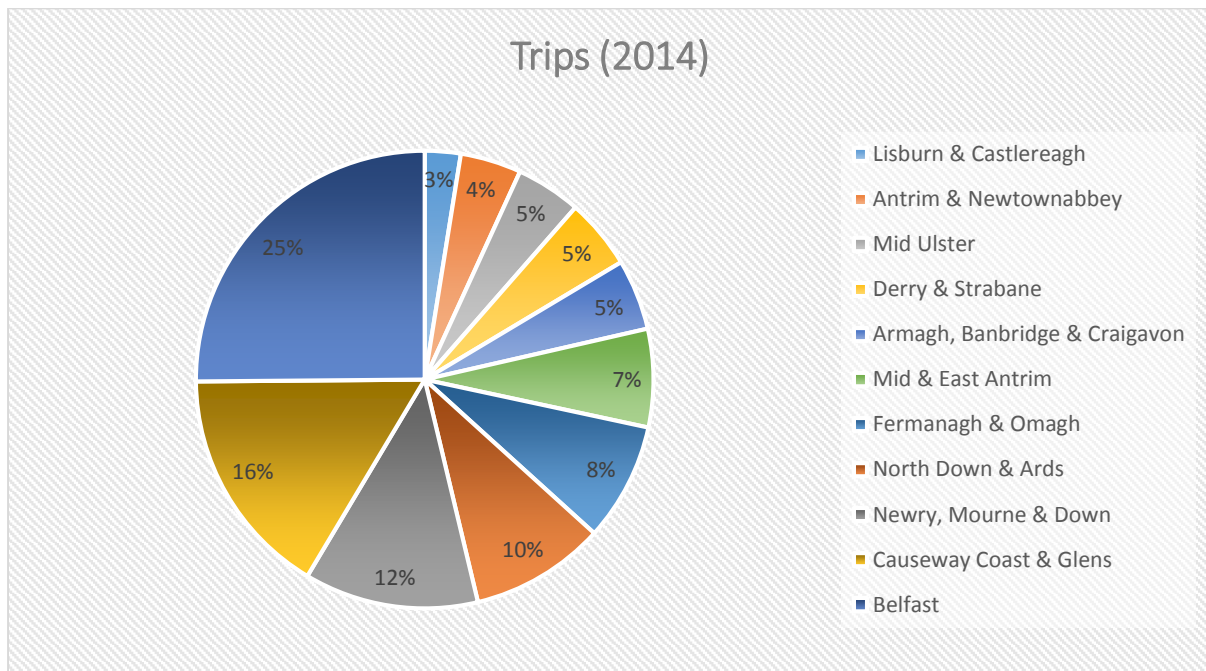
ABC Tourism Statistics and Performance

Overnight Trips

- 5.5** According to statistics as released under the Local Government District Tourism Statistics Northern Ireland 2014, the ABC area had the fifth lowest number of Overnight Trips secured in 2014 (the lowest being in Lisburn and Castlereagh District and the highest being Belfast). The ABC area also had the third lowest Expenditure on Overnight trips of all the Local Government Districts in Northern Ireland (the lowest being again in the Lisburn and Castlereagh District and the highest again is Belfast). The latest Local Government District Tourism Statistics 2014 for Northern Ireland were published on 28 May 2015 by NISRA. See **Figures 1 & 2**

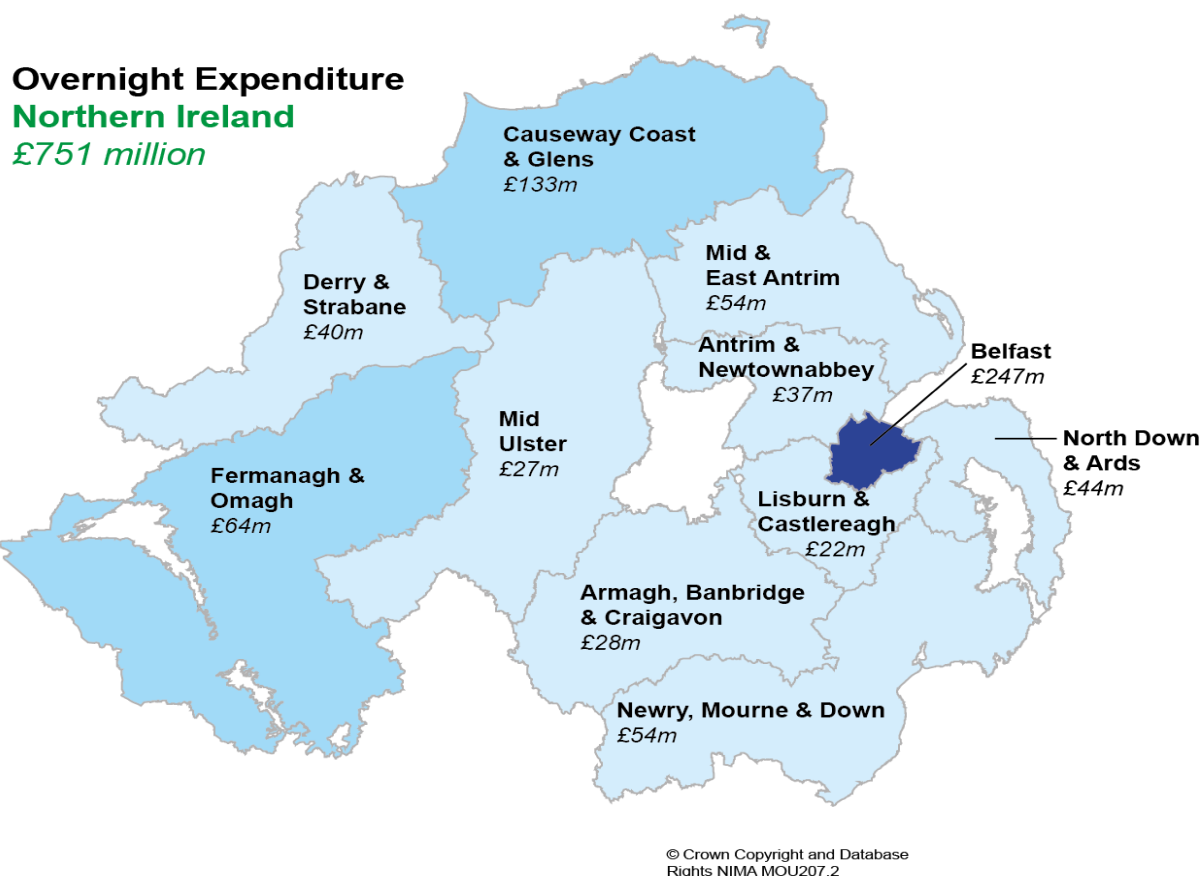
N.B: Headline tourism statistics are measured using standard UN definitions. The UN use the concept of “overnighting”. This is broadly defined as staying away from your usual place of residence for one night or more. This does not need to be for holiday, it can also relate to visiting relatives, business 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 2014 (statistics source – NISRA).



* Source: Local Government District Tourism Statistics 2014, NISRA.

Figure 2: Estimated Expenditure on Overnight Trips by Local Government District 2014
(Expenditure illustrated is in GBP £)



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

Table 1: The overall share of ABC in Northern Ireland Tourism Market compared to Northern Ireland Average, 2014.

Area	Overnight Trips	Trips %	Expenditure (£)	Expenditure %
NI Total	4,641,000	100	£751 million	100
ABC	232,000	5%	£28 million	4%

* Source: Local Government District Tourism Statistics 2014, NIRSA.

5.6 The latest available tourism statistics range for the years 2012, 2013 and 2014 indicate that overall, ABC is in line with Northern Ireland and has experienced an overall increase in overnight trips secured year on year. Overnight trips in ABC have increased from 128572 in 2012 to 231998 in 2014.

5.7 As shown in **Figure 1**, ABC secured the fifth lowest number of Overnight Trips compared to other Local Government Districts in Northern Ireland for the year 2013.

5.8 According to these statistics, the top reason for an overnight trip in the ABC District was due to tourists visiting friends or relatives. 65% of people visiting ABC between 2012 and 2014 came to stay for this reason. This was above the Northern Ireland average of 42%. The second biggest reason for visiting was for Holiday and Leisure Purposes at 20%, but this fell short of the Northern Ireland average for this reasoning, which illustrated a 43% average or overnight trips were for this purpose. Overnight Trips for business purposes in ABC at 7% are lower than the NI average of 9%.

Table 2: Estimated Average Overnight Trips in Northern Ireland by Reason for Visit and Local Government District 2012 – 2014.

Local Government District	Holiday/Pleasure/ Leisure			Visiting Friends and Relatives (VFR)			Business			Other			All	
	n	% HPL	% LGD	n	% VFR	% LGD	n	% Business	% LGD	n	% Other	% LGD	n	% NI
Antrim and Newtownabbey	81,833	4%	34%	122,605	7%	50%	22,420	6%	9%	17,175	6%	7%	244,033	6%
Armagh, Banbridge and Craigavon	40,162	2%	20%	128,992	7%	65%	14,816	4%	7%	14,715	5%	7%	198,685	4%
Belfast	484,543	26%	40%	450,621	24%	37%	197,087	49%	16%	72,161	27%	6%	1,204,412	27%
Causeway Coast and Glens	448,607	24%	60%	212,455	11%	28%	26,279	7%	4%	64,546	24%	9%	753,887	17%
Derry and Strabane	67,977	4%	32%	98,883	5%	46%	31,827	8%	15%	14,736	6%	7%	213,423	5%
Fermanagh and Omagh	160,175	8%	45%	158,806	9%	45%	19,465	5%	6%	14,381	5%	4%	352,828	8%
Lisburn and Castlereagh	37,995	2%	30%	71,215	4%	55%	16,544	4%	13%	2,854	1%	2%	128,609	3%
Mid and East Antrim	102,195	5%	36%	148,718	8%	53%	17,838	4%	6%	11,412	4%	4%	280,163	6%
Mid Ulster	55,811	3%	32%	95,811	5%	54%	16,867	4%	10%	8,675	3%	5%	177,165	4%
Newry, Mourne and Down	254,012	13%	51%	195,660	11%	39%	19,880	5%	4%	26,391	10%	5%	495,943	11%
North Down and Ards	165,207	9%	44%	172,337	9%	46%	18,436	5%	5%	20,662	8%	5%	376,642	9%
Northern Ireland	1,898,516	100%	43%	1,856,105	100%	42%	403,460	100%	9%	267,707	100%	6%	4,425,789	100%

* Source: Local Government District Tourism Statistics 2014 (NISRA)

Table 3: Estimated Average Overnight Trips in Northern Ireland by Place of Origin and Local Government District 2012 – 2014.

LDG	Northern Ireland	Great Britain	Other European	North America	Other	All
Antrim and Newtownabbey	108,420	77,626	14,435	13,271	30,282	244,034
Armagh, Banbridge and Craigavon	81,639	68,838	14,626	12,206	21,376	198,684
Belfast	360,191	479,701	125,974	106,816	131,731	1,204,412
Causeway Coast and Glens	479,820	117,663	25,573	26,418	104,412	753,887
Derry and Strabane	80,047	81,487	19,929	17,788	23,235	222,486
Fermanagh and Omagh	226,610	54,990	12,719	10,126	48,383	352,827
Lisburn and Castlereagh	27,972	64,220	13,526	11,515	11,375	128,609
Mid and East Antrim	133,544	81,773	16,925	15,061	32,862	280,165
Mid Ulster	93,102	44,277	8,825	8,398	22,561	177,163
Newry, Mourne and Down	328,775	69,562	14,665	13,534	69,408	495,945
North Down and Ards	188,905	103,364	21,769	18,490	44,114	376,642
Northern Ireland	2,109,025	1,243,502	288,966	253,623	539,739	4,434,855

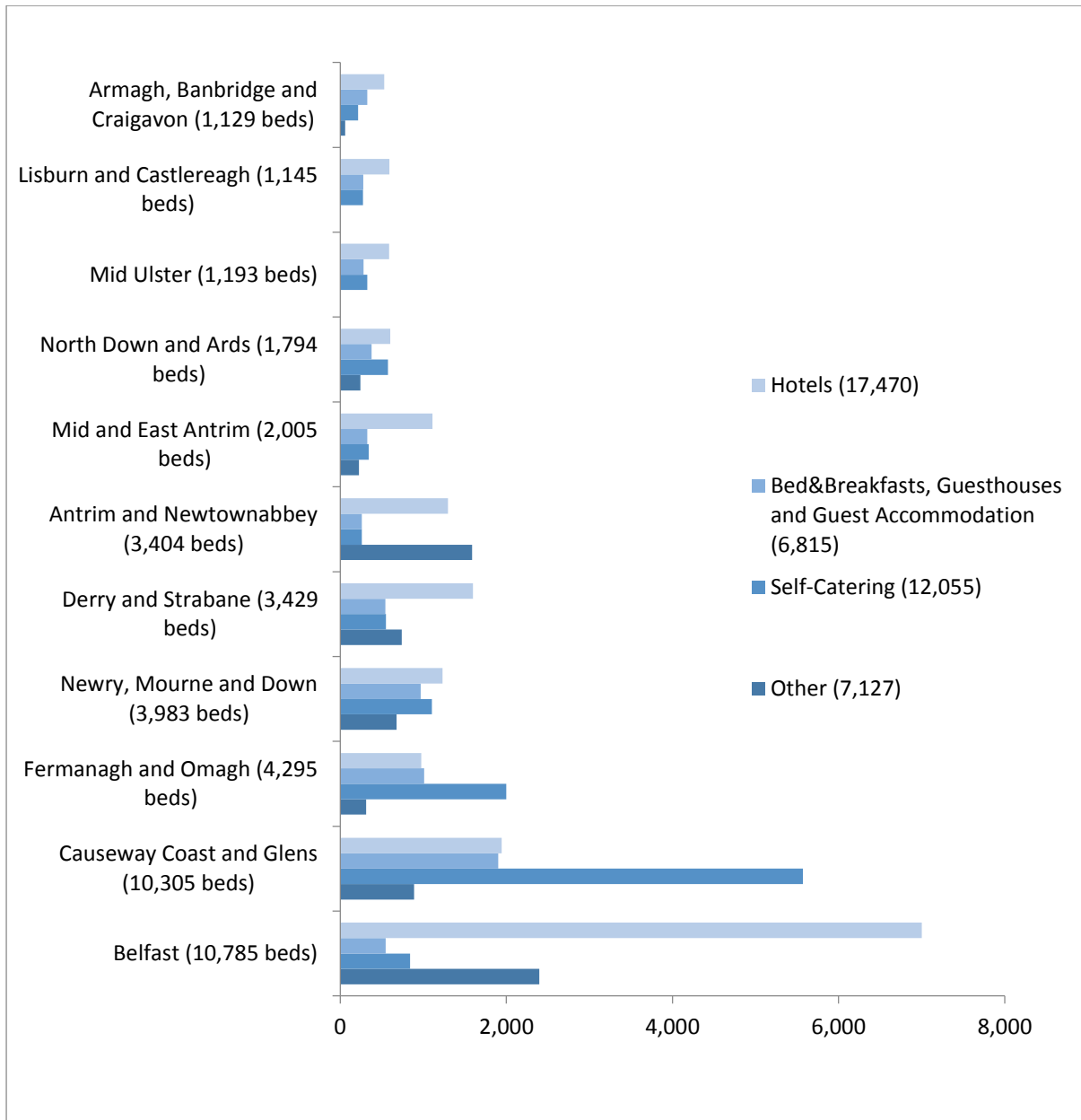
* Source: Local Government District Tourism Statistics 2014, NISRA.

5.9 According to statistics as indicated in the chart above, the vast majority of overnight trips within Northern Ireland are made by domestic tourists (48%). This figure is similar to ABC where 41% of overnight trips were made by domestic tourists. Statistically, ABC had a larger percentage share of overnight visitors from Great Britain (35% 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 ABC are there to visit friends and relatives – the

reason that less domestic tourists stay in ABC is likely due to the fact that the region 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.

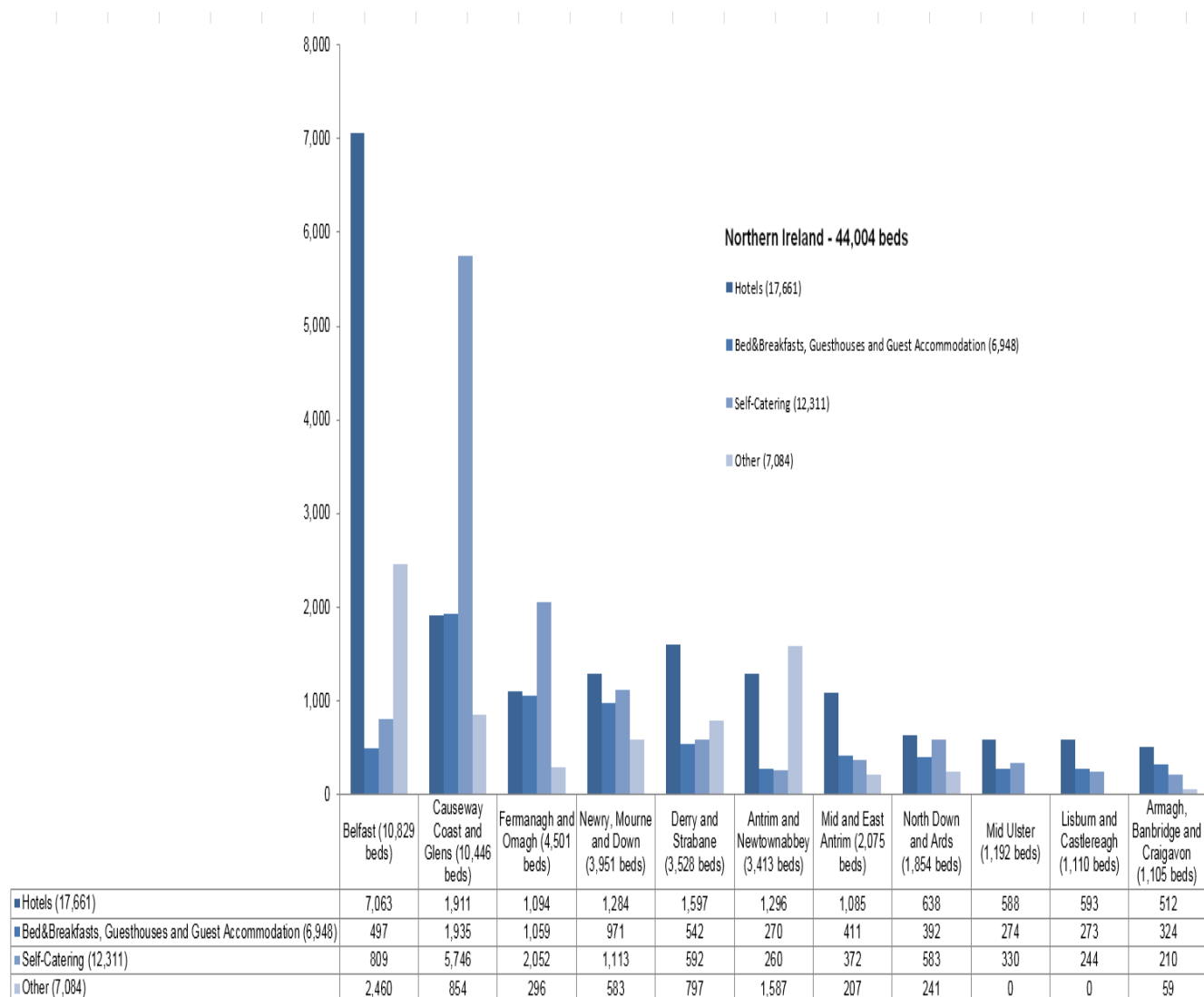
5.10 In terms of accommodation, ABC has the third lowest number of hotel bed spaces and the lowest number of bed spaces of all the Local Government Districts for hotels, Guesthouses, guest accommodation, B&Bs and self catering combined. There are a number of hotels in the area which have the potential to continue to provide important bed spaces e.g. Armagh City Hotel in Armagh, the Seagoe Hotel, Portadown and the Belmont hotel in Banbridge. However, research carried out for the Regeneration and Development Strategy has highlighted the lack of top quality accommodation across the entire Council Area. Consequently development of a new high quality hotel would be actively encouraged.

Figure 3: Number of Beds available in Licensed Accommodation by Accommodation Type and Local Government District, 2014.



* Source: Local Government District Tourism Statistics 2014, NIRSA.

Figure 4 Number of beds available by accommodation type and LGD 2013.



* Source: Local Government District Tourism Statistics 2013 (NISRA)

Table 4: Certified hotel, self-catering, guesthouse and B&B stock by ABC region (2014).

Area (Including Former District)	Premises (No.)	%	Room (No.)	%	Bed-Spaces (No.)	%
NI Total	2291	100	22023	100	43467	100
Armagh, Banbridge & Craigavon	74	3.23	469	2.13	1128	2.6

* NISRA Tourism Statistics for Local Government Areas, 2014.

Activity Tourism

- 5.11** 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 Armagh, Banbridge and Craigavon?

- 5.12** 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.
- 5.13** 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

- 5.14** Angling represents a key product to deliver growth and competitiveness for tourism in Northern Ireland and ABC. 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).
- 5.15** Given its location directly alongside Lough Neagh and its tributaries, ABC 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 Kinnegoe Marina and Corbet Lough. Other opportunities for fishing are at Lowry's lake, River Blackwater, Loughbrickland Lake and the Upper Bann.

The main beneficiaries of increased angling tourism in the Council 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:

5.16 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 statistically the least popular activity type for both domestic tourists and tourists from the Republic of Ireland to Northern Ireland

Figure 5: Domestic visitor participation in activities by activity type, NI 2009.

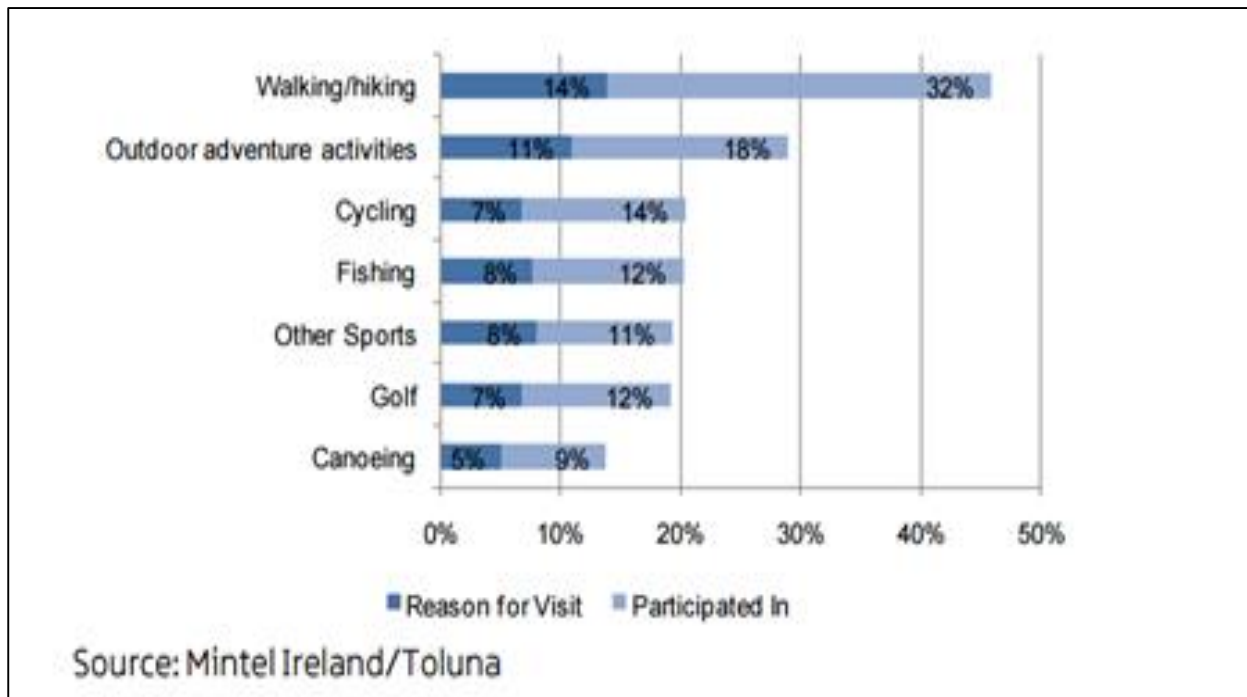
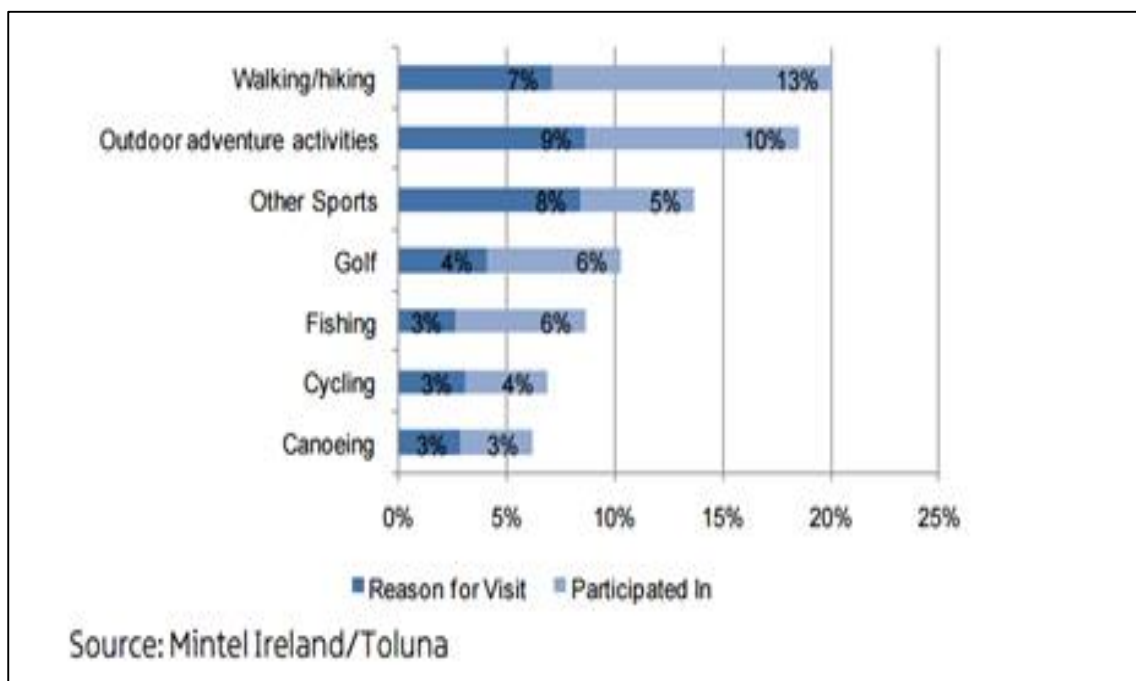


Figure 6: RoI visitor participation in activities by activity type 2009.



- 5.17** There are nine recognised Canoe Trails in Northern Ireland, two of which are directly accessible from the ABC 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. Part of this trail passes through the Council Area. The Lough Neagh Canoe Trail has many access points along the entire shore circumference of Lough Neagh and can be accessed via seven specific access points in ABC.
- 5.18** In terms of the wider watersports market, cruising and boat hire is a facility available via Kinnegoe Marina on the shores of Lough Neagh. The Coney Explorer and Master McGra’ offer half hourly boat trips each Saturday and Sunday from April – October weather permitting. Both are also available for private hire.
- 5.19** 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 2014 – 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.

- 5.20** 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.
- 5.21** Oxford Island and Kinnegoe Marina are excellent tourism resources on the shores of lough Neagh, both are owned and managed by the Council. Oxford Island is in fact a peninsula. It can be easily accessed from the M1. Much of the area is designated as a National Nature Reserve due to its wide variety of habitats such as reed beds, open water, wildlife ponds and wildflower meadows. The site has a number of facilities including a network of trails, birdwatching hides, the Kinnego Marina, Waterside House and the Lough Neagh Discovery Centre.

Golf

- 5.22** 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 7 Golf Courses in the ABC Area, Armagh, Lurgan, Portadown, Silverwood, Banbridge, Tandragee and Loughgall Golf Courses.
- 5.23** 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.

- 5.24** 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

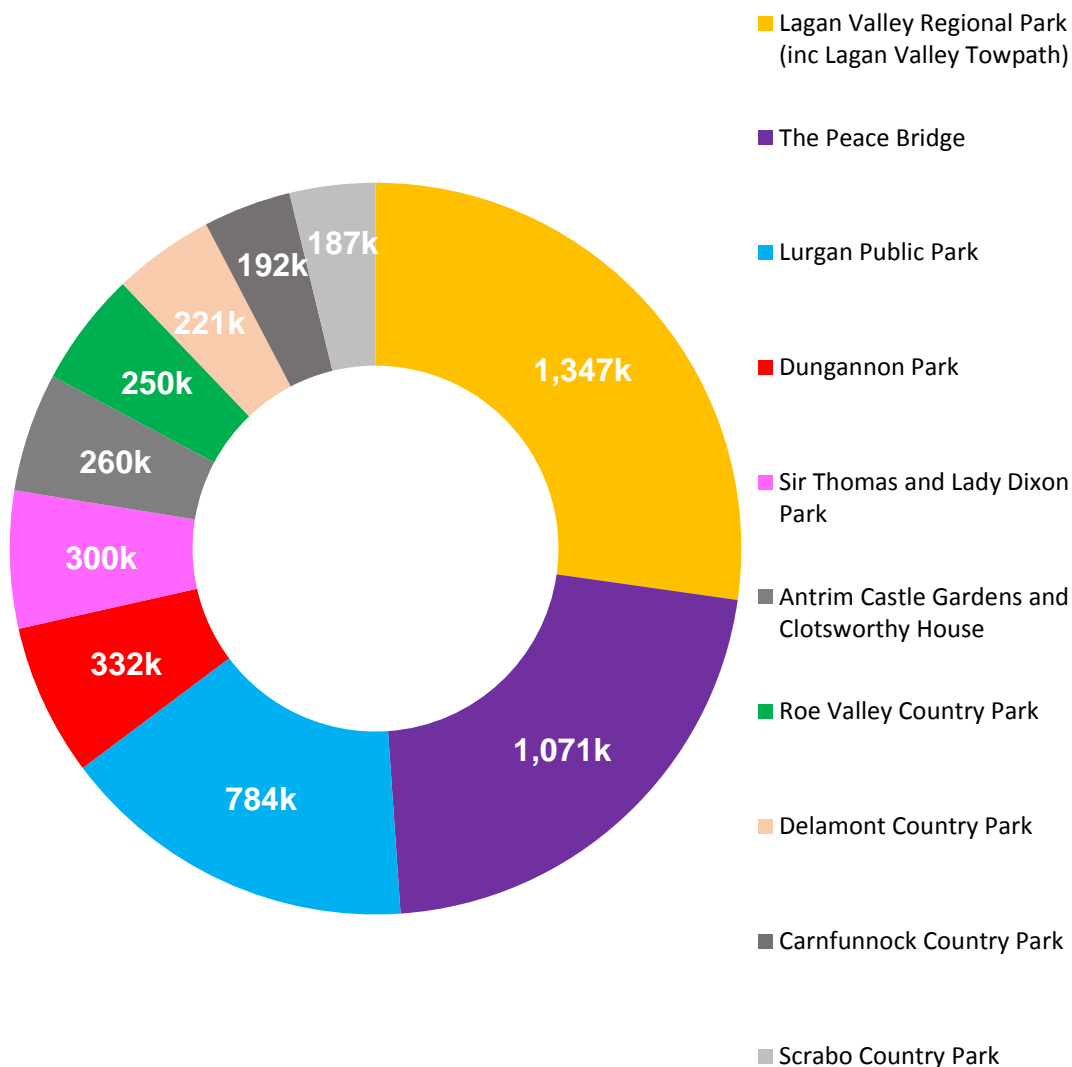
- 5.25** Within the new Council area there is a growing network of cycling routes. Craigavon, Portadown and Lurgan offer lots of variety for walking and cycling and legacy projects such as Craigavon Borough Council’s ‘Craigavon Community Greenway’ project has significantly improved existing facilities. This project attracted funding of £1.3million from DRD and extended for 7 miles from Portadown rail station to Lurgan rail station. It included the refurbishment of underpasses, the installation of new toucan crossings, lighting, signage and resurfacing and aims to encourage and increase walking and cycling levels.
- 5.26** In June 2016 the Borough will host the official start to the UK Street Velodrome Series. The Velodrome tour is part of the NI Festival of Cycling 2016.
- 5.27** The National Cycle Network has a number of routes running through the Council Area. It is a millennium project, the aim of which is to provide a safe, attractive, high quality network of traffic –free paths and quiet on-road cycling and walking routes that connect to every major town and city in the UK. It also provides a major new amenity for walkers and people with disabilities. The project is co –ordinated by the charity Sustrans, which involved a partnership with District councils, land-owning bodies, government departments and specialist and local interest groups. The NCN Route 91 runs west from Portadown to Tynan via Armagh and route 9 / 94 (The Craigavon Cycle Trail) starts and finishes in nearby Portadown.
- 5.28** Mountain biking is also 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).

Walking and Orienteering

- 5.29** 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. Lurgan Park, a popular local walking area attracts the 3rd highest number of visitors in NI.
- 5.30** The Ulster Way – a 625 mile (1000 km) circular long distance walking route around Northern Ireland also traverses part of the Council Area with routes from Portadown to

Newry (along the Ulster Canal Tow Path) and from Scarva to Aughnacloy. Dating back to 1946 when Wilfrid Capper MBE had the inspiration to create a circular walking route taking in the six counties of Northern Ireland, the Ulster Way is one of the longest walking routes in the United Kingdom and Ireland. In order to provide a high quality walking experience the revised Ulster Way was launched in 2009 and provides walkers with the opportunity to take in Northern Ireland’s spectacularly varied scenery. The revised route is separated into ‘Quality’ and ‘Link’ sections designed to help maximise the potential of the best walking areas in Northern Ireland whilst minimising the time spent on busy roads.

Figure 7: Top 10 Country Parks/ Parks, Gardens and Forests NI 2014



Source: NISRA 2015

Table 5: Visitor Attractions within ABC and their number of visitors 2011 - 2014.

Visitor Attraction	2011	2012	2013	2014
Armagh Ancestry	720	–	145	260
Armagh County Museum	12,851	13,099	9,452	10,001
Armagh Observatory	42,000	43,000	11,000	40,000
Armagh Planetarium	35,700	41,011	47,706	49,957
Armagh Public Library	4,403	6,094	7,086	7,713
Ballydougan Pottery at Bloomvale House	15,000	–	9,000	9,000
Dan Winter's House	3,530	3,197	3,925	4,160
Dungannon Park	142,426	125,000	224,060	331,670
Gosford Forest Park	–	–	51,606	58,081
Millenium Court Arts Centre	12,072	15,302	16,552	16,602
Oxford Island National Nature Reserve	319,079	296,606	314,202	217,353
Peatlands Park	95,000	100,000	90,000	95,000
Portmore lough Nature Reserve	4,560	4,500	10,000	12,000
Royal Irish Fusiliers Museum	10,218	10,847	11,269	12,630
Tannaghmore Animal Farm	85,000	–	30,858	109,207
Fergusons Irish Linen Centre	1,844	1,833	1,873	1,654
St Patrick's Cathedral	35,190	35,822	36,270	68,939
The Navan Centre and Fort	45,200	45,000	50,792	49,328
Lurgan Public Park	750,000	487,859	770,156	784,292
No.5 Vicars' Hill	3,755	3,829	3,755	3,962
Milford House Museum	900	1,200	1,500	1,200
C&Js Animal Park	–	–	–	9,000
Kinnego Marina	343,927	158,448	174,345	216,000
Lough Neagh Discovery Centre	93,105	–	133,004	131,559
Coney Island	–	–	2,006	2,000

* Source, NISRA Local Government Tourism Statistics 2011 - 2014.

Horse-riding

5.31 Horse Riding facilities which exist in ABC are provided by the Private Sector.

Caravanning and camping

5.32 Caravanning and camping facilities in ABC are available at:

- Gosford forest Park
- Kinnegoe Marina
- Clare Glen
- Tepee Valley
- Lurgaboy Adventure Centre

Adventure Centres

5.33 Lurgaboy Activity centre is located within the Council area just outside Markethill. It is privately owned and offers adventure seeking activities, corporate team building weekends and also weekends to cater for Stag and Hen parties such as zip line, archery, raft building, outdoor karting and off road cycling. The facility also offers onsite accommodation in the form of cottages and camping 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

5.34 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 8: List of Popular Activities involving Cultural Heritage

Cultural Tourism
<ul style="list-style-type: none">▪ 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)

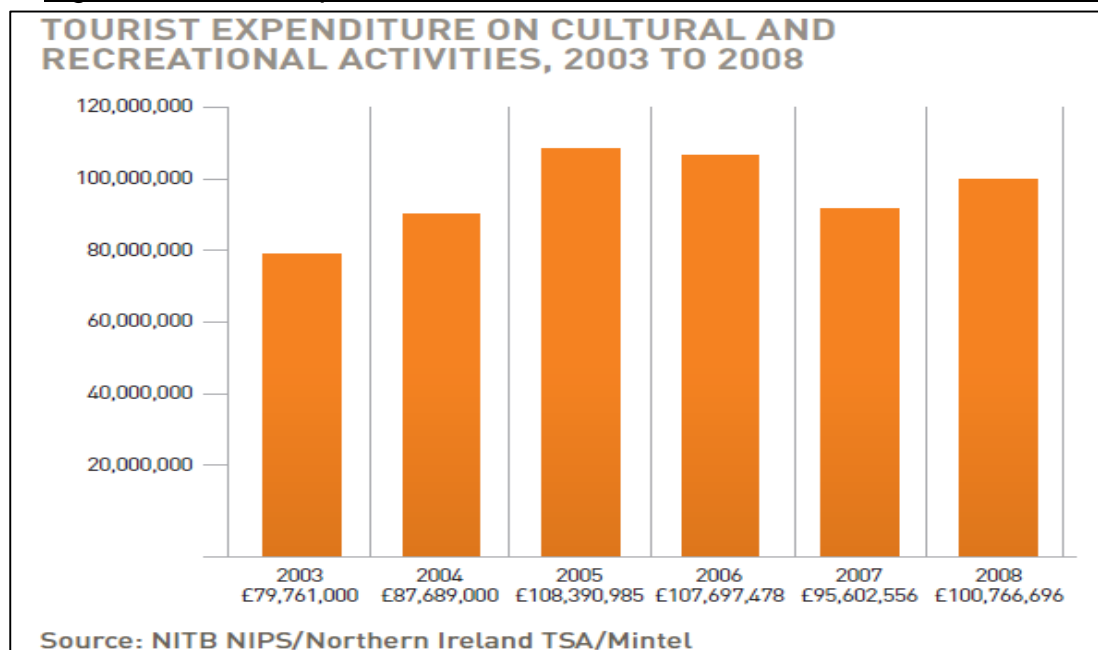
What forms of cultural tourism are available in ABC?

5.35 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 9**).

5.36 There already is a wealth of Cultural tourism offer across the entire Council Area. The following are a few examples of Cultural tourism are already taking place or on offer within the Borough:

- The St Patrick's festival in Armagh
- Scarva Day
- Country Comes to Town in Portadown
- The 7 Hills Blues Festival, Armagh
- The FE McWilliams Gallery in Banbridge
- Georgian day in Armagh

Figure 9: Tourist expenditure on cultural and recreational activities, 2003 – 2008



Music Events

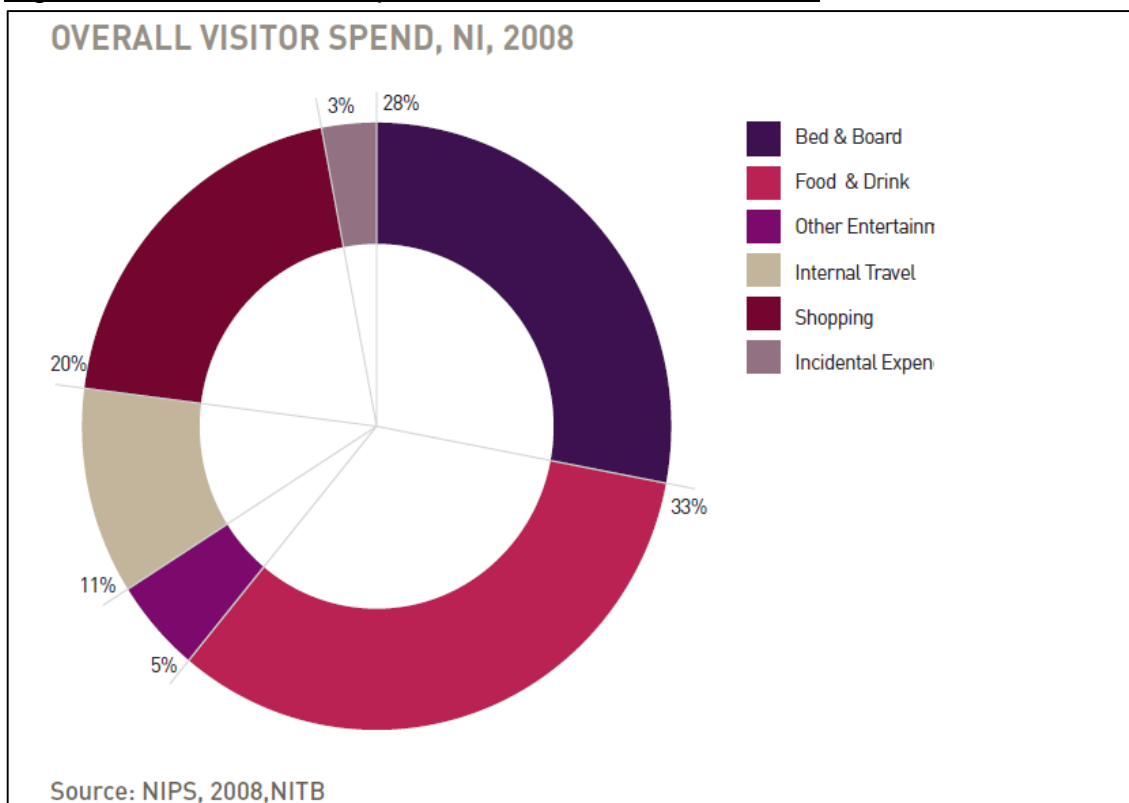
- 5.37** Foreign and domestic tourists now spend in excess of £100 million on cultural and recreational events in NI each year, with domestic tourists spending over £32 million on tickets to concerts and music festivals. Though individual concerts in larger venues such as the SSE Arena and Waterfront 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.
- 5.38** 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.)
- 5.39** In ABC the Seven Hills Blues Festival in Armagh is an example Music Tourism. The festival has been running for the past 5 years and offers a wide array of highly gifted acts across many different venues throughout the city, from pubs, restaurants

and shops. Events are run simultaneously to the music that are designed to enhance the experience, be it Blues workshops for the kids to graffiti artists and works from local artists to inspire everyone. The festival is a four days Blues extravaganza within the city and each day has a filled schedule of live music and events. With over 50 musical events in more than 20 different venues the whole city becomes a stage.

Food Tourism

5.40 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 visitors’ experience

Figure 10: Overall visitor spend in Northern Ireland, 2008.



5.41 Leveraging our unique, interesting and high quality local produce based food culture is a route to growing earnings for Northern Ireland. The Armagh Bramley Apple and 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.

- 5.42** Tourism NI is currently promoting 2016 as Northern Ireland's year of Food & Drink and as the Food Heartland of Northern Ireland the year provides a unique opportunity for the Borough to promote the entire Council area as a foodie destination and to enhance the visitor experience by layering food and drink into key events throughout the year. The initiative aims to promote the interests of agri-food providers from the Borough at local, national and international levels and to develop tourism and hospitality throughout the region.

Theatre and Screen Tourism

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 ABC area are the Marketplace Theatre in Armagh. This venue hosts 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 located within the Council Area, namely at Armagh, Banbridge and more recently at Craigavon. In addition to the established cinematic venues, Banbridge has played host to a small number of successful drive-in movie weekends in the recent past.

Restaurants, Pubs and Night-Clubs

- 5.47** The night time economy of ABC's larger towns are largely fuelled by the popularity of restaurants, 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 five towns and cities in Northern Ireland have achieved Purple Flag status for offering visitors a great night out – Armagh, Belfast, Enniskillen, Bangor and Derry-Londonderry. These urban areas have all been recognised for showing evening visitors an entertaining, diverse and safe night out.
- 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. Nine out of ten of the National Trusts most popular attractions were gardens.
- 5.52** The ABC Area has a wealth of built heritage assets which are a strong incentive towards attracting outside visitors to the area. The Borough contains 5 Conservation Areas at Armagh, Loughgall, Richhill, Lurgan, and Dromore. Armagh City's Georgian Architecture is a unique attraction for visitors. Other examples include National Trust properties at the Argory and Ardress House, parks such as Loughgall Country Park, Gosford Forest Park, Lurgan Park and monuments such as Dromore Motte and Bailey and Navan Fort. Navan Fort is now on a tentative list for recognition as a World Heritage Site (part of the Royal sites of Ireland).

Natural Heritage:

- 5.53** The major natural asset of the Borough is Lough Neagh and its associated wetlands which is recognised as one 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 ABC area benefit from some form of environmental protection status including RAMSAR sites, Special Protection Areas (SPAs), Special Areas of Conservation (SACs), Areas of Special Scientific interest

(ASSIs) and Nature Reserves. These will be discussed in detail in a paper on Environmental Assets which will be brought to the Committee in the near future.

Events Tourism

5.54 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.

5.55 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 ABC?

5.56 According to statistics, there were 63 local events in 2014-15 which obtained sponsorship in Northern Ireland by the NITB Events Fund. Of these 63, only 5 were within the ABC Area. In terms of international events, there were 12 events which obtained sponsorship. None of these were within the ABC. In 2015-16 12 international events obtained sponsorship, again none of these were in ABC. 40 regional events obtained sponsorship and 6 of these were within the Council Area.

5.57 Annual events such as Georgian Day in Armagh, The Tandragee 100 Motorcycle Race, the Lurgan Park Rally and Scarva day are particularly successful tourist generators within the Council Area.

6.0 Economic Impact of Tourism in Armagh City, Banbridge and Craigavon – Jobs, growth and the role of tourism to the local economy

6.1 Statistically, employment in the tourism industry in the ABC region rates well below the Northern Ireland national average. Latest results indicate that the entire area rates 6th out of the 11 Local Government Districts in this field of employment type.

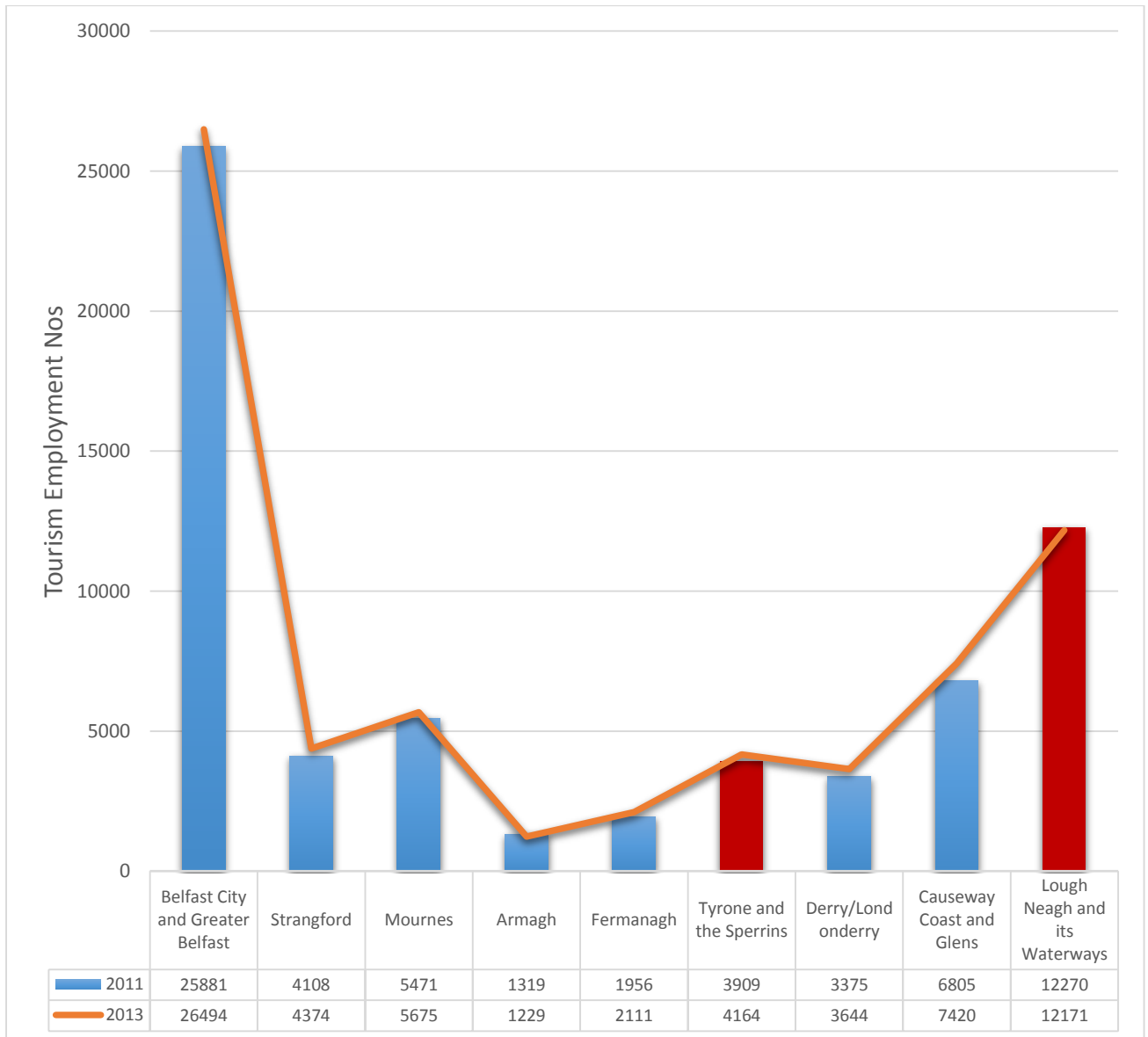
Table 6: Tourism characteristic employment within ABC compared to Northern Ireland Average, 2013.

Area	Tourism Employee Jobs	% of Total
NI Total	58042	100
ABC	4182	6%

* 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 11: 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.

7.0 Conclusion and Key Findings

7.1 Armagh City, Banbridge and Craigavon Borough 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 and opportunity for future growth of this sector within the ABC 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 2014 the ABC area had the fifth lowest number of overnight trips secured and the third lowest expenditure on overnight trips of all the local government districts;
- (ii) ABC attracted the lowest proportion of overnight stays for holiday/pleasure/leisure purposes and the highest proportion of overnight stays for the purposes of visiting friends and relatives than all the other LGDs;
- (iii) ABC has the 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) Armagh City has potential to develop as a unique heritage based tourist destination
- (v) Activity tourism has the potential to create important economic benefits particularly in the rural area;
- (vi) Water sport activities, including that based on connections to Lough Neagh, have important tourist potential; Oxford Island was the most popular visitor attraction in ABC (excluding country parks/parks/forests)
- (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 Armagh, are two of the nine 'key destinations' identified in the Draft Tourism Strategy for Northern Ireland 2020;
- (viii) ABC has 4182 tourism jobs which is 6% of the total employee jobs.

7.3 Land use planning has an important role in ensuring tourist development is in the interests of the local economy and community, and is not detrimental to the environment and meets sustainable development criteria. As set out in the SPPS and

PPS16 the formulation of a balanced tourism development strategy tailored to the needs and assets of the locality is required. The Council has recently held a workshop with members to discuss how such a strategy could be developed. It will be important that any associated policies which flow from the Tourism Strategy to the Plan Strategy take the following into account:

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

The new local Development Plan can also give consideration to identifying specific growth areas whilst protecting assets such as Lough Neagh and its waterways which need to be sensitively managed so as not to destroy the very asset on which their popularity depends.

- 7.4** ABC has significant tourism potential and any Tourism Strategy for the area has to be realistic and achievable. The LDP can help facilitate tourism development and growth by designating Tourism opportunity Zones and where appropriate Tourism Conservation Zones whilst safeguarding key tourism assets

Appendix 1:

Tourism Assets in Armagh City, Banbridge and Craigavon Borough

ARMAGH TOURISM ASSETS

Historic Houses, Parks, Gardens and Demesnes

- Gosford Forest Park
- Clare Glen
- Loughgall Country Park
- The Mall
- The Palace Demesne Public Park
- Ardress House
- The Argory
- Peatlands Park

Cathedrals

- St Patrick's Cathedral (RC)
- St Patrick's Cathedral (Col)

Heritage

Signature Project: St Patrick's Trail

- Armagh Gaol
- Armagh Observatory
- Armagh Planetarium
- Navan Centre and Fort
- Armagh Franciscan Friary
- Armagh Gaol
- Armagh County Museum
- Royal Fusiliers Museum
- No5 Vicars hill
- Armagh Public Library
- Cardinal Tomas O'Fiaich Library and Archive
- Irish and Local Studies Library
- Milford house Museum & William McCrum Park
- Sloan's House Interpretive & Heritage Centre
- Dan Winters House Ancestral Home (in the farmyard)
- Dan Winters Cottage & Ancestral Home
- Armagh Ancestry
- Tayto Factory

Activity and Adventure

- Brian Russell Fly Fishing
- Gosford Karting
- Lurgaboy Adventure Centre
- Millers Hill Fun Farm and Equestrian Centre
- Co Armagh Golf Club
- Tandragee Golf Club
- Hillview Lodge Driving Range

Entertainment

- The Marketplace Theatre
- Armagh Omniplex

BANBRIDGE TOURISM ASSETS

Historic Houses, Parks, Gardens and Demesnes

- Loughbrickland House
- Solitude Park
- Loughbrickland Park
- Scarva Park
- Dromore Park

Cathedrals

- Dromore Cathedral and high Cross

Heritage

- FE McWilliams Gallery and Studio
- Thomas Ferguson Irish Linen Centre
- Bronte Interpretive Centre and Homeland Drive
- Scarva Visitor centre and tea rooms
- Scarva Day
- Loughbrickland Historic Trail
- Dromore Mound (Motte & Bailey), Dromore Castle, Stocks
- Dromore Viaduct

Activity and Adventure

- Loughbrickland Lake
- Corbet Lough
- Newry Canal and Tow Path
- Scarva Bicycle hire
- Islandderry fishery and Tackle Shop
- Banbridge Leisure Centre
- Dromore Leisure Centre
- Banbridge Golf Club
- Mullahead and District ploughing Championship

Entertainment and Arts

- The Iveagh Moviehouse
- Mount Ida Pottery

Retail

- Banbridge Town Centre
- The Outlet Village

CRAIGAVON TOURISM ASSETS

Lough Neagh

- Kinnego Marina
- Oxford Island Nature Reserve
- Lough Neagh Discovery Centre
- Coney Island
- Gawleys Gate Quay
- Portmore Lough Nature Reserve

Parks, Gardens and Demesnes

- Maghery Country Park
- Tannaghmore Gardens
- Peatlands Park
- Lurgan Park
- Craigavon City Park
- Peoples Park, Portadown

Heritage

- The Barn Museum, Tannaghmore Gardens
- Brownlow House, Lurgan
- Christian Heritage Trail
- Craigavon Museum
- Lurgan Town Hall
- The Birches Link to 'Stonewall Jackson'
- The Old Coach Road
- Moneypenny's lock House and the Newry Canal
- Nuclear Bunker

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