

Tourism Strategy 2017-2021

January 2017



Comhairle Ceantair
an Iúir, Mhúrn
agus an Dúin

**Newry, Mourne
and Down**
District Council

Proud of our past. Building our future together.

Newry, Mourne & Down District Council
Corporate Plan 2015-19



Foreword



Cllr Gillian Fitzpatrick

Chairperson of Newry,
Mourne and Down
District Council

I am delighted to present our Tourism Strategy for Newry, Mourne and Down, 2017 – 2021. Tourism has long been a part of the local industry and has since been recognised as a key priority in our Corporate Plan and Economic Development Strategy.

This Strategy aims to maximise tourism growth for the area by adopting a fresh approach focused on recognising what makes Newry, Mourne and Down distinctive and set apart from other destinations.

You will see throughout the strategy reference to our headline ‘mountains, myths and maritime’. These have been identified as the three elements that will create a strong and distinctive image for our area.

Our promise, ‘delivering epic moments’ is focused on redefining our visitor destination experiences associated with the mountains and the coastline and those stories unique to us. Ultimately repositioning Newry, Mourne and Down into one of the premier year round destinations in Ireland.

The Strategy emphasises that tourism is everyone’s business and there is a need for collaboration for the long term growth of the tourism economy.

We invite you to work with us to build a unified and entrepreneurial industry that is customer focused and succeeds in delivering destination experiences to the international marketplace



“I have seen landscapes which, under a particular light, made me feel that at any moment a giant might raise his head over the next ridge.”

C.S. Lewis (in reference to the Mourne Mountains – the ‘setting’ for his Narnia Tales)

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Executive Summary: Strategy Framework

This five-year Strategy sets out the strategic direction for the tourism industry within the District of Newry, Mourne and Down. The document outlines the current situation, the strategy framework, and a series of recommendations that are designed to achieve the vision and goals, and to ensure that industry is in the business of delivering EPIC moments.

Vision 2021

Newry, Mourne & Down is a premier, year-round mountain and maritime destination in Ireland recognised for its EPIC experiences in outdoor adventure, its rich tapestry of cultural heritage, myths and unique stories, and its authentic local life.

Our Promise

**Delivering
'EPIC' moments**

Our Goals

To work collaboratively toward assisting Northern Ireland achieve its targeted growth rate of 6% per annum in overnight expenditure by:

- Focusing on developing visitor destination experiences that will deliver 'EPIC moments'.
- Building a unified and entrepreneurial industry that is customer-focused.
- Ensuring that the development of tourism is undertaken sustainably and contributes to the enhancement of social, cultural and environmental values.

Our Headline

Mountains, Myths and Maritime

Newry, Mourne and Down has long been recognised for its spectacular scenery; the dramatic relationship between the mountains and the sea; the myths and stories that highlight the rich cultural heritage of the region; and the unique opportunities to experience the outdoors against this composite backdrop of landscape and culture.

Our headline, mountains, myths and maritime, helps to develop a shared story that will begin to create a stronger image of what makes NMD distinctive - both in the minds of industry and ultimately within the marketplace.

It sets the stage for the Strategy's focus on creating destination experiences that are associated with the mountains and the coastline, and for its emphasis on the stories that give the destination experiences a unique quality.

A focus on 'EPIC' – The underlying approach

The concept of "EPIC" underlies the Strategy framework. It relates to **a new approach to developing experiences and working together.**

It has been used as both a concept and an acronym, and is designed to act as a 'cue' to inspire new thinking.

Delivering EPIC moments means delivering impressively great experiences. It means working in partnership to 'join up' existing disparate products to create experiences that are EPIC. Taken as an acronym, it challenges industry to think in terms of delivering tourism products that are:



The Strategic Framework



1. Introduction

This five-year Strategy sets out the strategic direction for the tourism industry within the District of Newry, Mourne and Down. It has been developed to support the Newry, Mourne and Down Corporate Plan 2015-2019 and the Newry, Mourne and Down Economic Regeneration & Investment Strategy 2015-2020, and is in alignment with key national tourism and economic development policies.

The significance of tourism

Tourism is a key economic driver within the District and was worth £47.7 million to the local economy in 2015. The sector supports almost 5,000 jobs, many of which are within small and medium sized industries distributed throughout the entire District.

Globally tourism has become a critical force for prosperity, well-being and overall development. It continues to grow despite occasional 'shocks', with 2015 representing the sixth consecutive year of above-average growth in international travel.

Within Northern Ireland, there is a strong commitment to leverage these global trends. The sector is currently worth 5.2% of the country's Gross Domestic Product (GDP), and generates revenue of £723 million while sustaining 43,000 jobs¹. In 2015 visitors arriving from outside of N.I. rose by 5%, and hotels were continuing to report growth in the first half of 2016². Maintaining this growth trajectory has become a central focus of the N.I. Assembly and the forthcoming N.I. Tourism Strategy.

The development of the NMD Tourism Strategy has been undertaken with the intent of building on this momentum, and identifying new opportunities to strengthen the District's tourism industry, the competitiveness of its core destination experiences, and its international appeal.

Newry, Mourne and Down District

The Review of Public Administration in 2015 resulted in the redrawing of local government boundaries and the establishment of the Newry, Mourne and Down District. It is located in the south-east of the country and is the gateway from Dublin into the North. The new jurisdiction is an area rich with tourism assets and natural beauty, and is characterised by the unique juxtaposition of mountains and sea. The area's natural beauty is well recognised in its three Areas of Outstanding Natural Beauty – the Mourne Mountains, the Ring of Gullion, and Strangford and Lecale.

The coastal experiences, the market towns and fishing villages, the world famous golfing and the array of outdoor adventure opportunities are layered upon an incredibly rich cultural heritage, including the life story of St. Patrick and the early days of Christianity in Ireland.

Visitor gateways and hubs are associated with Downpatrick, Newcastle, Newry, Warrenpoint/ Rostrevor, and the Crossmaglen area. The District lies in close proximity to the island of Ireland's two major urban centres – Belfast and Dublin – and is well served by the arterial A1/M1 corridor. The area is highly attractive to the domestic market and is one of the country's top holiday destinations for N.I. residents.

The planning process involved:

Strategy development process

The process was initiated by the Newry, Mourne and Down District Council (NMDDC) and facilitated by TEAM-Tourism Consulting. Strengthening tourism is a high priority for the Council, and it has set the goal of the District becoming one of the premier tourism destinations on the island of Ireland.

This Strategy is designed to be the road-map to achieve this goal. It provides direction for the development of tourism within the District of Newry, Mourne and Down, and a framework for the Council to work in partnership with a range of stakeholders toward realising a shared vision and pursuing consensus-based strategic priorities.

Extensive desk research on national, regional and local policies, strategies, and plans relating to tourism, economic development, infrastructure, land-use planning, and additional areas such as heritage and culture; and, the preparation of a Background Report.

Site visits to towns, villages, and attractions.

Participation in the Department for the Economy/ Tourism N.I. planning process for the forthcoming N.I. Tourism Strategy.

The development of a Strategy Framework discussion paper.

A regional industry forum attended by 36 participants, and discussion-presentations with key national and District stakeholders, and with the NMD Tourism Task and Finish Group.

Six action planning workshops and five drop-in sessions in Downpatrick, Mullaghbane, Newcastle, Newry, Strangford and Warrenpoint involving 140 participants.

Extensive one-on-one consultation with national governmental organisations and agencies, and key players within the District; and, a stakeholder electronic survey with 86 respondents.

The presentation of the draft Tourism Strategy to the NMD Tourism Task and Finish Group, and the circulation of the draft document to national and regional key agencies and stakeholders for feedback.

A review process involving national agencies, NMDDC tourism partners, the NMD Tourism Task and Finish Group, and all of Council.

2. The Current Situation

An assessment of the current situation provides the context for the Tourism Strategy and the rationale for its implementation.

This assessment is based on answering the overarching question: “Where are we now?”

The background research and the stakeholder consultation focused on identifying the following:

- Market and industry trends and factors that are influencing tourism today in 2016 and need to be taken into consideration in developing strategic priorities for the coming five years;
- The relevant national and regional planning policies and their implications for tourism within the District;
- The current visitor markets and industry performance; and,
- The strengths and the key issues facing the tourism industry that need to be maximised or addressed moving forward.

Market and industry trends

There are a range of factors and trends that are impacting tourism within the destination. Many are global in nature and not unique to NMD. Nevertheless, they need to be understood and taken into account in developing a strategy.

- **Increase in demand for experiences.** Visitors today are seeking deeper, authentic and memorable experiences that allow them to connect emotionally with the local destination and community culture.
- **Growth in themed tourism.** Themes can differentiate a destination, highlight its unique selling propositions, provide a framework for experience development, clustering, packaging and marketing, and have become increasingly important in positioning and branding a destination.
- **Changing demographics and generational trends.** There are certain demographic characteristics associated with key cohorts – particularly the Baby-Boom Generation and the Millennials that influence preferences and trip planning behaviour.
- **Customer segmentation research** has provided greater understanding of travel values and preferences, and has assisted in identifying niche segments that are likely to have an interest in visiting NMD.
- **Technology and technological innovation** continues to have an impact on the creation of compelling experiences, and how visitors participate in these experiences or select tourism products.
- **Volatility of global affairs,** such as fluctuations in currency exchange, and issues impacting traveller security and well-being are all factors that can cause unexpected changes in market trends, and need to be fully understood. Brexit is a prime example of events that can have an immediate effect on visitation trends.

The national strategic context – Tourism in N. Ireland

2015 Performance



4.5m trips

No change on 2014 on total overnight trips in N.I. Domestic visitors fell by 4% and external visitors rose by 5%.



15.4m nights

Total overnight trips in N.I. rose by 2%. Domestic overall nights fell by 5%, while external visitors rose by 6%.



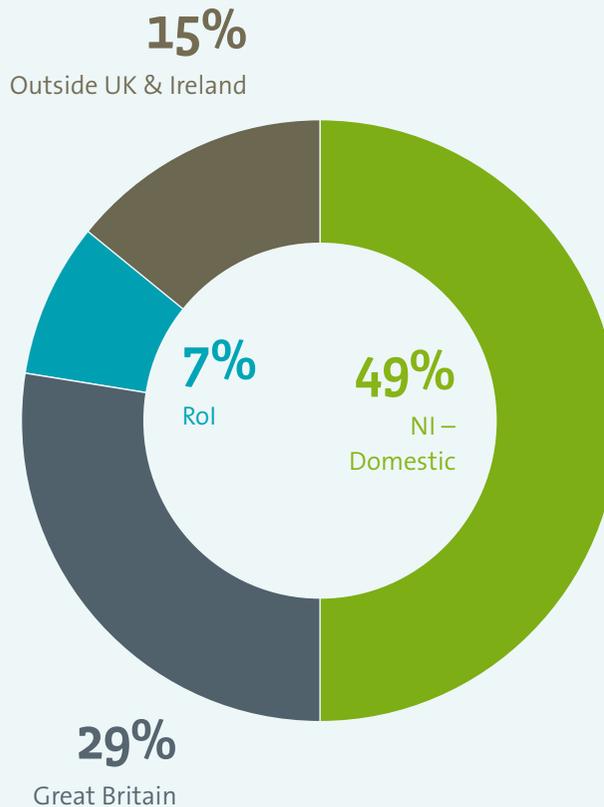
£760m spend

An increase of 1% on 2015. The domestic market fell by 8% in its value, while external visitors' expenditure rose by 5%.



Supports 58,000 jobs

Visitor geographic markets– Place of origin 2015



Source: Northern Ireland Annual Tourism Statistics 2015 – Published May 2016

The strategic emphasis

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

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

Anticipated areas of strategic emphasis include:

- The **need for a major proposition** that will have high international appeal and can readily complement the three key propositions in the Republic of Ireland – The Wild Atlantic Way, Ireland’s Ancient East, and Dublin.
- The **importance of developing unique and compelling experiences** that will align with the major proposition and are rooted in a ‘sense of place’.
- A **visitor-centric approach** that is based on a strong understanding of visitor expectations and motivations.
- A **partnership-based model for the delivery of tourism** that creates a high level of synergy through the effective collaboration of the public and private sectors, with government continuing to play a key enabling role.
- A particular **focus on strategic export markets**, which in turn will require a commitment to quality and to leveraging unique attributes that differentiate the destination.
- An emphasis on **ensuring longer-term relevant skill-sets**.

The national enabling context

In addition to the forthcoming Tourism Strategy for N.I., there are a number of overarching national and regional strategic planning policies and programmes that support the sustainable development of tourism³.

Policies of particular relevance include:

- The **Draft Programme for Government Framework 2016-2021** which stresses the importance of nurturing tourism as a high-performing export-led sector. A greater emphasis on co-designing and co-delivering the Programme and securing strategic alignment between outcomes at all levels is anticipated.
- The **Strategic Planning Policy Statements for N.I.** published in 2015 that facilitate sustainable tourism development, safeguard tourism assets, support its role in growing the regional economy, and promote a high standard of quality and design.
- The **Regional Development Strategy 2035** which provides the Government's strategic planning framework, and the Regional Guidance statements. The Strategy promotes a sustainable approach to the provision of tourism infrastructure.
- The **Rural Development Programme** supporting an enhanced level of tourism infrastructure in rural areas to assist in diversifying rural economies.

The impact of these specific Government strategic planning policies on tourism is further complemented by:

- The **revitalised approach to the use of forest settings for recreation**. Following a recent review⁴, there is now a significant emphasis on developing new visitor experiences. The potential to make a tangible difference was particularly noted in relation to the NMD District.
- The development of a **new vision that has positioned events firmly as a driver of growth for the country**. These are to be visitor inspired, showcasing Northern Ireland as a unique destination on a global stage, as a place to live, work, study and visit⁵.
- A heightened emphasis on seven sectors of significance to Tourism N.I., including **music; food; gardens; activities; literature, theatre and screen; golf; and craft⁶**.
- The forthcoming **N.I Visitor Information Strategy 2016-2020** which is designed to achieve more streamlined and cost-effective visitor information provision, and a strategic and operational framework for the new Local Authorities to use in shaping their own policies and structures for visitor information provision.

At the regional level, there is also a series of **local Area Plans and Masterplans**, many of which highlight proposals aimed at strengthening local and regional tourism assets.



The national enabling context

Tourism has been clearly identified by NMD District Council as a key area of priority within the **Corporate Plan 2015-2019**. The further development of tourism is seen as pivotal in achieving NMDDC's corporate vision to create opportunities for local people and local communities to thrive by supporting sustainable economic growth over time and helping them to lead fulfilling lifestyles.

To this end, the Council has set the goal of becoming one of the premier tourism destinations on the island of Ireland and is looking to focus on ensuring that it has the cultural and tourism infrastructure in place that will attract and serve the expectations of a growing number of local and international visitors.

This commitment is further emphasised in the **Economic Regeneration & Investment Strategy 2015-2020** where tourism is both a standalone and an integrated theme⁷ – one of five: Tourism; Economic Development; Urban Regeneration, Rural Regeneration; and Arts, Culture and Heritage – where progress on one theme will positively impact all or a range of other themes.

The overarching tourism related objectives identified in this strategy are:

1. **To become the destination of choice in N.I.**
2. **To become N.I.'s premier outdoor/adventure destination**
3. **To become one of N.I.'s finest events destinations**

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

Tourism by its nature is not just a cross-cutting theme within economic regeneration and investment, but it is equally a theme that is impacted by virtually all local government activity – from local and community development planning, to the management of bus shelters and corporate facilities, and the implementation of corporate innovation and transformation.

The NMDDC therefore recognises that sustainable growth of tourism will be a function of an integrated approach involving ALL departments, with all divisions needing to develop an awareness of the linkages between their divisional mandates and the factors contributing to destination competitiveness. A collaborative internal local government approach is as critical to the implementation of this Strategy, as is an effective public private partnership.

NMDDC Corporate Plan Strategic Objectives

By 2019 we will have:

1. **Become one of the premier tourism destinations** on the island of Ireland.

2. **Attracted investment** and supported the creation of **new jobs**.

3. Supported improved health and well-being outcomes.

4. **Protected our natural and built environment.**

5. Led the **regeneration of our urban and rural areas**.

6. Advocated on your behalf specifically in relation to those issues which really matter to you.

7. **Empowered and improved the capacity of our communities.**

8. Transformed and modernised the Council, providing accessible as well as value for money services.

Overview summary of strategic context

<h3>National</h3>	<p>Programme for Government Framework 2016-21 (Draft) – recognises the economic importance of tourism and the potential to grow the tourism industry into a high-performing export-led sector</p> <hr/> <p>Tourism 2025 – forthcoming ten-year strategy for tourism in NI: GOAL – grow tourism to a £1 billion export industry by 2025 (i.e. a target growth rate of 6% per annum)</p> <hr/> <p>Rural Development Programme + enabling policies – e.g. Strategic Planning Policy Statements</p> <hr/> <p>Sector plans and policies – N.I. Forests, golf, cycling, food tourism, literature and screen tourism</p> <hr/> <p>N.I. Visitor Information Strategy 2016-2020 (Draft)</p>		
<h3>NMD Corporate</h3>	<p>Living Well Together (Draft)</p> <p>Newry, Mourne and Down is a place with strong, safe and vibrant communities where everyone has a good quality of life and access to opportunities, choices and high quality services which are sustainable, accessible and meet people’s needs.</p> <p>Our Values:</p> <ul style="list-style-type: none"> • Effective leadership • Good governance • Collective ownership • Democratic accountability 	 <p>Newry, Mourne & Down Tourism Strategy 2017-2021</p>	<p>NMD Corporate Plan 2015-2019</p> <p>...goal of becoming one of the premier tourism destinations on the island of Ireland.</p> <p>NMD Economic Regeneration & Investment Strategy 2015-2020</p> <ol style="list-style-type: none"> 1. To become the destination of choice in NI 2. To become NI’s premier outdoor/adventure destination 3. To become one of NI’s finest events destinations
<h3>Regional NMD</h3>	<p>Regional tourism plans – e.g. Destination Mourne Mountains Tourism Management Plan 2013-2018</p> <hr/> <p>AONB and designated landscape plans</p> <hr/> <p>Local and regional outdoor recreation and access plans – e.g. Camlough Lake Masterplan</p>	<p>Tourism product development plans – e.g. Mourne Coastal Route draft Masterplan; Maximising Tourism Potential of St Patrick</p> <hr/> <p>Feasibility studies – e.g. Slieve Donard Gondola Lift Project</p> <hr/> <p>Infrastructure studies – e.g. Tourist Accommodation Scoping Study</p>	<p>Local area regeneration plans and masterplans – e.g. Downpatrick Town Centre Masterplan; Newry City Centre Masterplan; South East Coast Masterplan</p> <hr/> <p>Event plans and policies</p>

Tourism performance in NMD District 2015



404,442 overnight trips

NMD accounts for 9% of all overnight trips in N.I.



Supports 4,780 jobs

NMD accounts for 9% of all tourism jobs in N.I. (2013 data)



1.06m nights

NMD accounts for 7% of all nights in N.I. Average length of stay in NMD is 2.6 days (2014 data), which is the lowest in N.I.



552% room occupancy

In 2015 the average hotel occupancy rate for hotel rooms is up 3 points on the previous year to reach 55%. The average rate for N.I. overall is 67%. B&B room occupancy for the District in 2015 is 17% (second lowest LGD) and 29% for self catering rooms

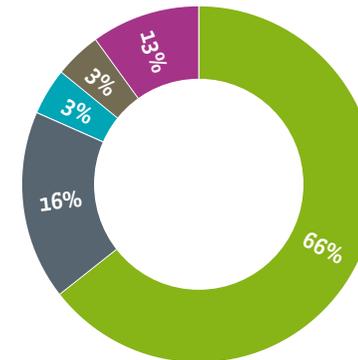


£47.7m spend

Total visitor spend in NMD is £47.7 million representing 6% of all visitor spend in N.I. In 2015 visitor spend in NMD declined by 12% over 2014, while N.I. as a whole experienced a 1% increase. In 2014 the average spend per night is £36, which is the second lowest for a Local Government District in N.I.

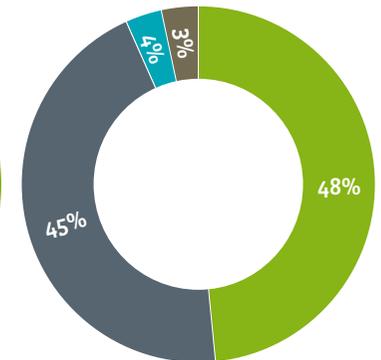
NMD District market analysis in 2015

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



Origin of Visitors 2013-2015
3-Year Rolling Average

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



Reason for Visit 2013-2015
3-Year Rolling Average

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

Strengths and opportunities

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



The strengths of NMD as the 'destination'

- **Outstanding and diverse scenic beauty** with the unique combination of mountains, forests, coast, waterways, market towns and fishing villages. This beauty is officially recognised within the three designated Areas of Outstanding Natural Beauty – the Mourne Mountains, the Ring of Gullion, and Strangford and Lecale.
 - **An exceedingly rich cultural heritage** that embraces the 'story of Ireland in microcosm'. An intricate tapestry of human history dating back over 6,000 years from the Stone Age, through the waves of dynasties and invasions to the story of St. Patrick and the birth of Christianity within Ireland, including today's wealth of authentic arts, culture and music. This 'culturescape' is further enriched with the intermix of legends, stories and a 'touch of magic'; and, its association with literary works such as the writings of C.S. Lewis and the film industry – notably the Game of Thrones.
 - **Unique diversity of ecosystems, geology and topography** that are officially recognised in the AONBs and through a range of additional designations, including National Nature Reserves, Special Areas of Conservation and Special Protection Areas – which all offer related opportunities for **wildlife viewing**.
- A living landscape that is shaped by its centuries of **maritime, industrial and farming heritage** and is increasingly promoting its local foods and products.
 - Strong domestic recognition for **adventure and outdoor-based recreation**, that includes increasing strengths in **mountain biking, hiking**, and an array of **marine and inland water-based recreational opportunities** (including angling) associated with the diverse range of beaches and inland water areas. Ongoing improvements to access infrastructure and recent enhanced cooperation between public land owners, together with activities of voluntary interest groups and NMDDC are gradually increasing the potential opportunities.
 - World renowned **golf** courses.
 - Extensive range of **Council tourism events and community festivals and events**, with a number playing a significant role in strengthening the District's positioning in certain sectors such as the Red Bull Foxhunt, the Nature & Sports Euro'meet, and the Irish Open, while others highlight the local stories and cultural heritage.
 - A range of **gateway communities** that can be further strengthened as destination hubs.
 - Good **transportation linkages** and close proximity to the Belfast-Dublin markets and ports of arrival.
 - Capacity to grow the **yachting and cruise** markets.

The strengths of the 'industry'

The tourism industry is essentially a composite 'community' of business sectors, agencies, local organisations and national and local governments that work on various aspects of the destination experience from the aesthetics of the towns and countryside, to transportation, accommodation, and retail – through to businesses that are directly facilitating experiences at visitor sites and attractions.

The following strengths are characteristic of this composite community of interests, and provide a solid platform for more effective destination management and development.

- With the District Council's new roles and responsibilities in relation to the development of tourism, there is now a **greater level of local government involvement and commitment** to facilitate the development of tourism. The cross-department activities of NMDDC touch many aspects of developing a competitive destination, and there is significant potential to build on these linkages.
- A wide **range of national agencies and government bodies are playing a proactive role in tourism** within the District. Tourism N.I., for example, has seconded a Senior Officer to NMDDC, and N.I. Forest Service and the National Trust are looking to strengthen their respective visitor experiences and to explore opportunities for more effective collaboration in the development of tourism.
- The **private sector has a strong element of entrepreneurship** and is highly motivated to build capacity and work together in building new visitor experiences.
- At the community level, there are **local and regional voluntary interest groups**, such as the Newry & Portadown branch of the Inland Waterways Association of Ireland that are active in both advocacy and destination development.
- The **AONB management structures** have all played a strategic role in developing a **focus on experiential tourism** through the respective training programmes in visitor guiding, story-telling and the delivery of memorable experiences. The Mourne Heritage Trust and the Ring of Gullion Partnership have been particularly active in facilitating sustainable access to the countryside, and offering new and innovative experiences that combine the natural setting with arts and culture, and new opportunities for outdoor recreation.
- The industry's **commitment to sustainability has grown** with initiatives such as the Green Tourism Business Accreditation scheme. This emphasis on sustainability is a key underlying principle to the work of the AONB management structures, and has raised awareness of factors that need to be taken into consideration in maintaining the integrity of the District's inherent social, cultural, and environmental values.

The strategic challenges

In analysing the opportunity there is a need to assess it strategically from the consumer's perspective, and to keep this assessment in alignment with the strategic approach of the Department for the Economy and Tourism N.I. While there are significant strengths and opportunities, the research and consultation identified a range of challenges and factors that are currently constraining growth and need to be addressed in the Tourism Strategy.

- There is an **over-dependence on N.I. visitors and a high degree of seasonality**. Sixty-six per cent of visitation is domestic, while the average for N.I. is 48%. Although this domestic market is important, it is characterised by a lower spend and a shorter stay in comparison to other markets. The District's proximity to Belfast and its recognition for outdoor recreation day-visits compounds the issue of **short stays**. This issue is accentuated by the **absence of a strong flagship product** or experience and **limited wet weather product**. The combination of these factors highlights the importance of exploring ways of attracting the higher-yield external markets, addressing the challenge of seasonality for all markets, and identifying opportunities to increase length of stay.
 - While the District has significant tourism products and assets, there is no unified market identity. There is a long list of 'things to do', but **no cohesive sense of 'promise' or strategic positioning** which has the effect of a seemingly disjointed destination experience in the market place. This in turn limits the ability to encourage visitors to move around and disperse further within the destination.
 - In the absence of a unified identity **the marketing messaging is fragmented**, varies in quality, and at times is duplicated. This fragmentation carries over into the digital promotion of the area.
 - There is a wealth of **stories and themes** that can be utilised for the development of immersive experiences. The value of these stories and themes has been recognised by stakeholders such as the Mourne Heritage Trust and the Ring of Gullion Partnership, and there has been a substantial effort to build new themed experiences, enhance interpretation and develop story-telling skills. However, there has not been a regional approach to developing consensus on these key stories nor a wider strategic commitment to the development of experiential tourism. Given that the District has the potential to present 'the story of Ireland in microcosm', this aspect of product development needs strategic consideration.
- NMD has a range of access challenges that relate to:**
- The condition and carrying capacity of rural roads;
 - Public transportation linkages within NMD;
 - Accessing the water in Strangford Lough and beach access in the Carlingford Lough area;
 - Signage on and off road, including signage on the A1;
 - Parking in upland honey-pot areas and coach parking in Newry; and,
 - Peak season traffic congestion and parking constraints in Newcastle.

- The need for a more **joined-up approach** is a pervasive issue that relates not just to access, but to almost every element of tourism relating to the District. This includes the need for increased connectivity and a more joined-up approach with regard to:

The existing trail networks and canoe trail experiences;

The development of new product and experiences through innovative partnerships, including collaborative partnerships with neighbouring Councils both North and South, and national agencies, such as N.I. Water;

The planning of countryside infrastructure and the development of a more strategic and streamlined approach to responding to planning applications;

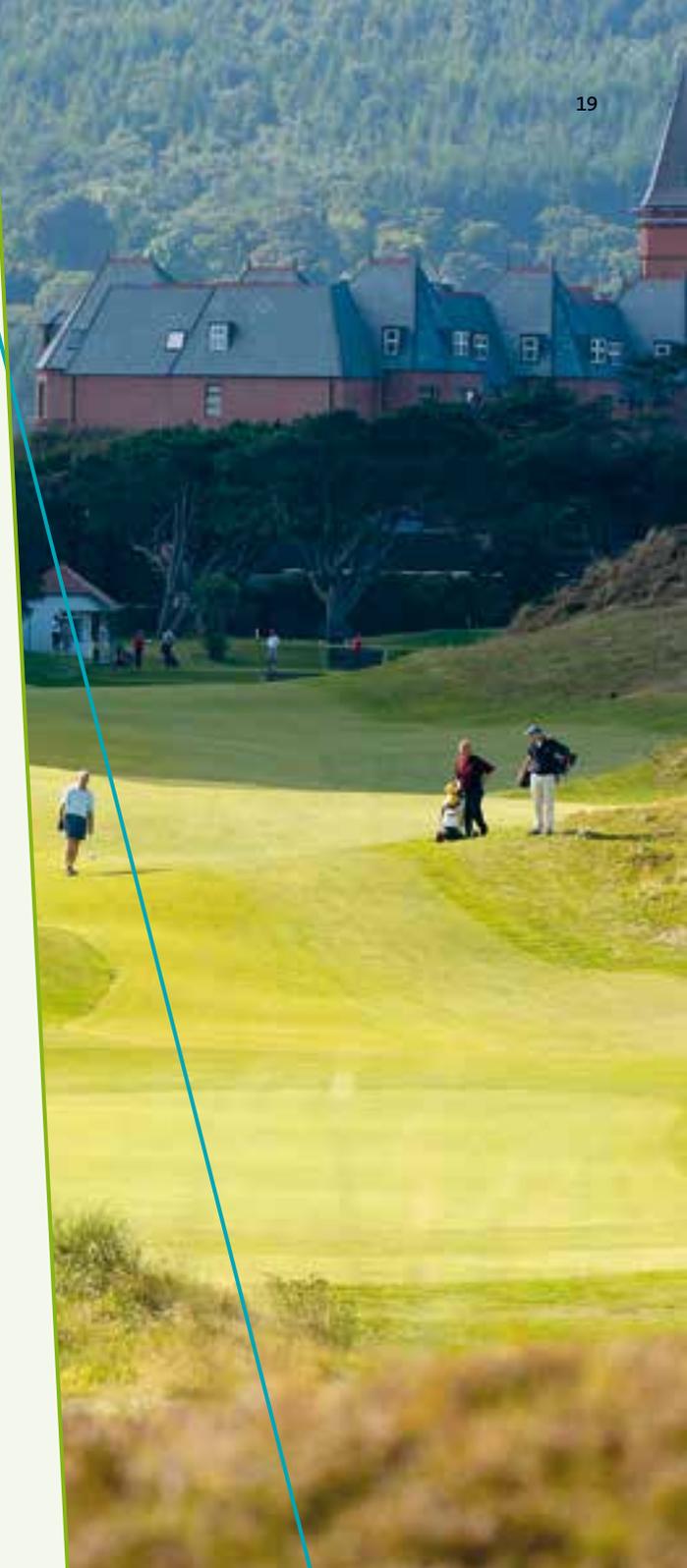
Countryside and destination management on the ground;

Wi-Fi connectivity; and,

The role of towns as gateways and strategic hubs, with specific consideration of visitor information services, the sense of place, and the spectrum of related visitor services.

- Equally there is a need to address the **current sense of fragmentation within the industry** and to bring it together into a more cohesive networking and collaborative 'community' with enhanced supporting mechanisms and communications.
- The **accommodation base** has inherent weaknesses relating to the type, quantity, quality and location. Considerable effort has been put toward identifying accommodation needs, particularly where the absence of adequate accommodation is clearly constraining growth. Downpatrick is a prime example of an area that needs further investment in new room stock, although the issue is pervasive across much of the District.
- **Tourism** plays a key role in the regional economy, but its **significance is not fully understood** by the wider community and this can constrain the pursuit of visionary goals that require wider buy-in from residents and other businesses.

A key objective of this strategy is to address each of these concerns, while leveraging the strengths and opportunities. In doing so, there will need to be an emphasis on the cross border partnerships with Louth County Council and Monaghan County Council, and the partnerships with Armagh City, Banbridge and Craigavon Borough Council and Ards and North Down Borough Council to maximise visitor opportunities that extend across administrative and national boundaries.



3. The Strategy Overview

Vision 2021

Newry, Mourne & Down is a premier, year-round mountain and maritime destination in Ireland recognised for its EPIC experiences in outdoor adventure, its rich tapestry of cultural heritage, myths and unique stories, and its authentic local life.

Our Promise

Delivering

E P I C

moments

Our Goals

To work collaboratively toward assisting Northern Ireland achieve its targeted growth rate of 6% per annum in overnight expenditure by:

- Focusing on developing visitor destination experiences that will deliver 'EPIC moments'.
- Building a unified and entrepreneurial industry that is customer-focused.
- Ensuring that the development of tourism is undertaken sustainably and contributes to the enhancement of social, cultural and environmental values.

Our Headline

Mountains, Myths and Maritime.

Newry, Mourne and Down has long been recognised for its spectacular scenery; the dramatic relationship between the mountains and the sea; the changing moods of the landscape; the myths and magic of its rich association with bygone eras; its megaliths, tombs and cairns; its vibrancy of music and song; its ballads and poets; and the unique opportunities to experience the outdoors against this rich backdrop of natural and cultural heritage.

Developing a shared story will begin to create a stronger image of what makes NMD distinctive - both in the minds of industry and ultimately within the marketplace. A headline summarises a story and will assist stakeholders in identifying and understanding the essence of the destination.

The underlying themes bring the headline to life.

They build on the unique inter-relationship between the area's cultural heritage, the landscape and the activities that take place within this setting, while elevating the linkages between the past and the present.

Our underlying themes:

Outdoor adventures to challenge and refresh the body, spirit and mind

Unique cultural heritage in inspirational settings

The storybook of Ireland

Redefining our destination experience focus – ‘Mountains, Myths and Maritime’

Clarifying the headline provides a basis for redefining the ‘destination’. Newry, Mourne and Down is an administrative entity – something that is distinctly different to a visitor destination.

The visitor destination experience has to embody the headline and bring it to life. This destination experience has to be easily understood by the marketplace.

In this context the primary focus has to be on the ‘**mountains**’ and their unique integration of myths, legends, contemporary culture and inspirational settings with outdoor adventure. This is what distinguishes the Mourne Mountains and the Ring of Gullion as a destination from other comparable upland destinations.

At the same time, the coastal or ‘**maritime**’ theme is strong and resonates with many visitors. The coast, as with the mountains, offers a range of opportunities for outdoor adventure – both land and marine-based. It has a story to tell that contributes to the storybook of Ireland – from ancient times, to the landing of St. Patrick, and through to modern maritime activities.

These destination experiences complement each other. They provide a basis for profiling the rich biodiversity and geodiversity of the landscape and its stunning views, and they offer the potential of bringing the ‘headline’ and underlying themes to the forefront. In many ways they build on existing branding for ‘The Mourne Mountains and the Ring of Gullion’ and ‘The Mourne Coastal Route’. Under this approach the Strangford and Lecale Coast is integrated into the overall coastal destination experience that stretches from Strangford to Warrenpoint.

The concept of ‘**myths**’ relates to storytelling and to enriching the visitor experience through animating the key underlining themes that make up the storybook of Ireland. This concept relates to all of NMD and is the basis for ‘stitching’ much of the rich cultural tapestry together.

Undoubtedly, the story and heritage of St. Patrick is one of the key themes that has the potential to differentiate NMD and to provide a foundation for a visitor experience that is both unique to the District and capable of being extended country-wide.

Gateway and hub communities

While the headline ‘mountains, myths, and maritime’ personifies the essence of the destination experience within NMD, there are a number of communities that have the capacity to strengthen their role as gateway to the destination experiences or as smaller service hubs. Towns such as Downpatrick, Newcastle, the City of Newry, and Warrenpoint/Rostrevor can all play a gateway function, while many of the other coastal towns and villages and smaller settlements such as Crossmaglen can increase their profile through strengthening their role as a hub for the two primary destination experiences.



**Mourne
Mountains
& Ring of Gullion**



**Mourne
Coastal
Route**

A focus on 'EPIC' – the underlying approach

The concept of 'EPIC' underlies the Strategy framework.

It relates to a **new approach to developing experiences and working together**. It has been used as both a concept and an acronym, and is designed to act as a 'cue' to inspire new thinking. As such, it should not be considered within the context of either branding or marketing.

Taking EPIC as a descriptive term, it conjures up impressions of 'heroic'; 'majestic'; 'impressively great'; 'remarkable' – all words that industry should aspire to in providing services and experiences for the visitor.

Equally the concept of EPIC can be regarded as a **stretch target** in the development and delivery of experiences – from EPIC trails and adventure to EPIC events and attractions. It implies a **'joining up'** of what already exists, to create the basis for impressively great products and experiences.

Finally, as an acronym, EPIC provides a new focus for industry – one that emphasises the importance of delivering tourism products that are:



A promise to deliver EPIC moments embraces all aspects of this approach.



Critical success factors

Tourism is a critical economic driver in NMD.

It plays a key role in creating jobs; diversifying the rural economy; ensuring the viability of smaller community businesses; celebrating the local cultural heritage values; providing a rationale for maintaining the integrity of landscapes and ecosystems; and, establishing a business case for investing in community infrastructure and sense of place.

Achieving the vision and goals will be the basis for realising these benefits and improving the overall well-being of NMD residents. To be successful in building dynamic destination experiences that personify the 'headline' and communities that are more fully integrated into the tourism economy, there will need to be an emphasis on three critical success factors or strategic priorities.

Progress on these priorities will provide the basis for new momentum that is needed to make a difference.

The three critical success factors identified in the planning process are to develop:

1. A focus on destination experiences and telling the story – with a commitment to game-changing projects and critical infrastructure
2. A joined-up approach (this applies to both the industry and to the products and experiences)
3. A compelling market presence and position.

The actions that follow in the Strategy are the outcome of intensive discussions with stakeholders on each of the priority areas. These actions seek to build on previous initiatives and strategies, and remain focused on realising the corporate vision of NMDDC for tourism.

Target markets for growth

With a growing emphasis on strengthening the experiential offer and bringing the 'headline' to life, and a more sophisticated approach to servicing the visitor in the gateway and hub communities, NMD will be in a much stronger position to pursue external markets that have a propensity to travel and are seeking authentic cultural experiences and landscape beauty. These are the markets that are likely to stay longer and spend more.

The Great Britain and overseas market segments detailed in this section present the best prospects for international tourism growth at a Northern Ireland level and within the NMD region. The targeting of these key segments will provide a strong alignment with the N.I. Tourism Strategy once it is published by the Department for the Economy. The three key markets are the Cultural Curious, Great Escapers and Social Energisers

1. Culturally Curious

Key Words – Curiosity, authenticity, insight, independence, immersion in culture, off the beaten track, exploration.

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

Who Are They – The age group for this demographic is 40 plus. They are independent active sightseers and rarely travel in a family group.

2. Great Escapers

Key Words – Slow travel, relaxation, rebalancing, getting away from it all, connecting with loved ones.

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

Who Are They – They are often couples, approximately 30 years old – sometimes travelling with children. They are seeking to reconnect with nature and their partner.

3. Social Energisers

Key Words – Excitement, energy, fun & laughter, adventure, spontaneous, social, the 'wow' factor.

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

Who Are They – Generally young couples and adult groups looking for excitement, new experiences, and a fun, social holiday in somewhere different

In addition to these markets, the following RoI and domestic market segments remain important:

Time Together;

Mature Cosmopolitans;

Family Fun; and,

Young and Lively

There are many overlaps between the two sets of target markets

The Strategic Framework





The remainder of this strategy looks at what is required in building the destination experiences – the Mourne-Gullion Experience, the Mourne Coastal Experience and the gateway communities – Downpatrick, Newcastle, Newry, Warrenpoint, Rostrevor, and the Crossmaglen area.

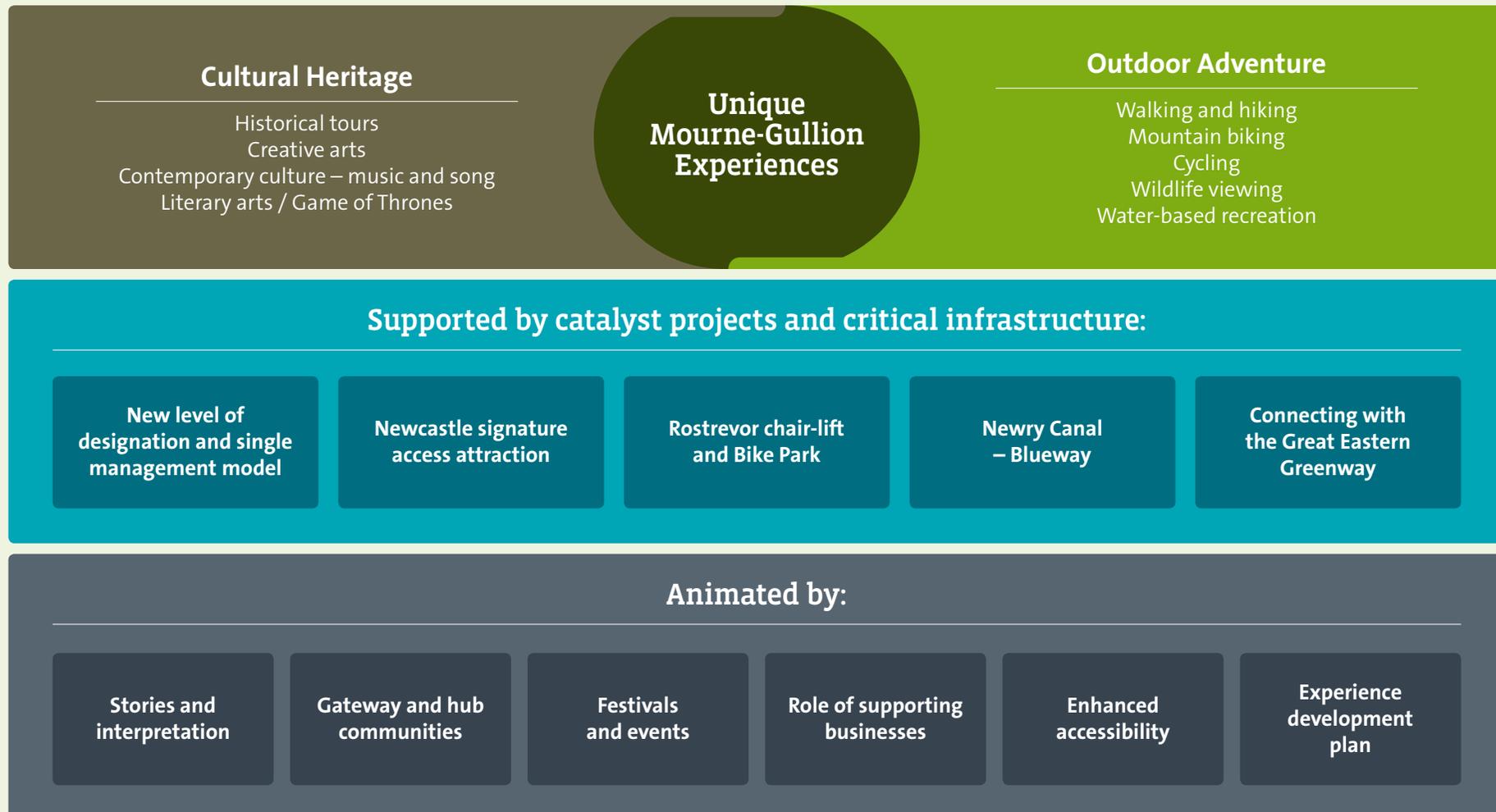
There are a number of destination management strategies and masterplans already in place, and this strategy does not seek to duplicate them. Rather, the emphasis is on identifying projects that should have a catalytic effect in growing the value of tourism and in building a stronger identity for the unique destination experiences within NMD.

Bringing these destinations to life in a dynamic manner that will attract new international markets and increased visitation from traditional markets will require a commitment to a number of critical success factors.

These factors generally relate to a new way thinking about the development and delivery of tourism in NMD – in effect, a new mindset that understands the value of tourism as an economic driver and the importance of seeing tourism as everyone's business.

It is these success factors that will animate the destinations and will entice visitors to stay longer, spend more, recommend to friends, and return again.

4. A Focus on Destination Experiences – The Mournes & Ring Of Gullion



Introduction

The Mourne Mountains and the Ring of Gullion provide an exceptional backdrop for a wide array of nature-based activities and cultural heritage tourism. It is a landscape that has been recognised for its scenic qualities through AONB designations, and offers insights into many of the myths, stories and historical accounts of the evolution of today's cultural landscape. The underlying interpretive themes include elements of the St. Patrick story – a theme that overlays much of NMD.

Key Interpretive Themes:

1. Ancient and inspirational landscapes
2. Unique volcanic landforms
3. Juxtaposition of mountains and sea
4. Granite
5. Myths and magic
6. Storybook of Ireland – past to present
7. Resilience – industrial and agricultural heritage
8. Living, working landscape



The two upland areas are already working together to present the destination experience as a combined composite of activities that target the thrill seeker, the family, and those seeking quiet contemplation and ‘soft adventure’.

In actuality, the experiences are focused on a relatively small number of key locations, many of which are in public ownership – notably:

- The forest parks owned and managed by the N.I. Forest Service;
- The N.I. Water lands inside the Mourne Wall and Silent Valley Mountain Park;
- The access opportunities to the High Mournes facilitated by the National Trust at Slieve Commedagh and Slieve Donard; and,
- Council’s provision of access facilities at key points including parklands at Donard and Kilbroney, and car parks at key routes such as Carrick Little, Bloody Bridge and Trassey Track.

In recent years there has been significant development of access infrastructure around many of these assets, raising the provision to high national/international standards.

Recent developments include:

- Mountain bike trails in Rostrevor and Castlewellan forests;
- New and/or enhanced walking trails at Castlewellan Forest, Bunkers Hill, Kilbroney Park, Silent Valley, the Granite Trail, and Slieve Gullion;
- Adventure play areas in Slieve Gullion and Kilbroney;
- Public art and artistic trails across the area; and,
- Enhanced geotourism product and services.

In addition to these initiatives, developments have also occurred along the coastal route, which will be looked at in Chapter 5.

Summary of strengths and weaknesses

Strengths:

- The upland experiences are very accessible geographically.
- The management structures of both the Mourne AONB and the Ring of Gullion are based on a collaborative partnership-based model that cover a spectrum of expertise from outdoor recreation and sustainable tourism, to biodiversity, agriculture/land-management, forestry, geology and built heritage.

- There is recognition in the domestic market that the area provides N.I.’s most significant outdoor recreation resource and access for appreciation of the environment. The area, for example, is increasingly recognised as a mountain biking destination of distinction.
- There is enhanced cooperation between public land owners, with the development of licence agreements for recreational development between the Forest Service and Council being the most significant formal arrangement.
- Through collective working agreements, much of the management and maintenance of forest and upland amenity access is being managed by the Mourne Heritage Trust and NMDDC on behalf of the various public owners.
- Considerable emphasis has been placed on delivering unique experiences. Both areas have focused on identifying underlying stories, integrating these stories into experiences, and training guides and ambassadors to deliver memorable experiences.
- Joint marketing is highly evident – particularly with regard to printed publications.

Weaknesses:

- A lack of a clear and compelling proposition for either area. The status of AONB is not sufficient to create a strong position in the market place. Attempts to pursue alternative designations (National Park status and Global Geopark status) have stalled for various reasons.
- Despite recent progress on developing a more cohesive approach to management (particularly trail development) and creative interpretation, the current arrangements continue to remain somewhat fragmented with a large number of organisations still involved in landscape management and outdoor access provision – with each employing quite different approaches and policies. There remains a need for greater consistency of approach and wider deployment of some of the existing expertise and management practices.
- There are gaps in visitor infrastructure, notably in the capacity of car parks at ‘honeypot’ sites such as Bloody Bridge, Carrick Little and Slieve Gullion; and road access to key sites such as Silent Valley can be challenging for visitors.
- The mountain biking opportunity is potentially constrained by the absence of infrastructure such as lift serviced facilities and a skills-based bike park.
- There are issues relating to accessing freshwater areas and the potential for developing a long-distance ‘Blueway’ has yet to be fully recognised and embraced.
- There ‘are missing links and fragmentation in the green lane access network which is limiting the ability to promote multi-day off-road hiking – an inconsistent approach to signage compounds the issue.
- The potential to continue improving interpretation and storytelling at focal points has not been fully realised.
- The lack of a ‘stand out’ or ‘flagship’ visitor attraction and/or visitor centre of a scale and standard commensurate with the quality of the landscape weakens the significance of the overall destination.
- The digital marketing of the areas is fragmented despite joint branding initiatives.
- The towns are not developing in tandem with the development of the Mourne and Slieve Gullion to drive visitor spend.
- There is an insufficient range of accommodation to service target markets.
- Transportation linkages are weak and visitor infrastructure is inadequate in select areas. There are additional traffic issues within the Newry area.



Catalyst projects and critical infrastructure

A series of catalyst projects have been identified that have the potential to be ‘game-changing’ in terms of growing the tourism economy. While not all of these projects may be entirely achievable within the five-year duration of this strategy, they all should be initiated during this period.

Catalyst Project:

UNESCO Global Geopark designation:

A cross border application with Co. Louth was initially submitted for the Mourne Cooley Gullion Aspiring UNESCO Global Geopark encompassing three Palaeogene Igneous Complexes now seen as the Mourne Mountains (County Down, Northern Ireland), the Cooley Peninsula (County Louth, Ireland), and the Ring of Gullion (County Armagh, Northern Ireland). The boundary within NMD included all of the Mourne and Slieve Croob AONB and the Gullion AONB.

Unfortunately the application process stalled and the dossier was withdrawn. The tourism strategy stakeholder discussions reignited enthusiasm for the initiative within NMD, and there is broad agreement that the Mourne AONB, and the Ring of Gullion AONB area should proceed with submitting a revised application through the UK National Commission for UNESCO.

A designation of European and global significance will play a key role in differentiating the area and in giving it a much stronger and cohesive market identity. This identity is critical in reinforcing the sense of ‘destination’ that has been lacking in the past, and will provide the basis for building a stronger overnight tourism industry.

It is possible that Geopark status could be augmented through the area continuing to aspire to alternative designations that will resonate with domestic and near-in markets.

Any decision to proceed with a new form of designation offers the opportunity to establish the basis of an alternative management model for the entire area – one that is based on a fully consolidated approach to management of existing recreation sites through a unified structure.



Recommendation:

Prepare a revised application for Global Geopark status to be submitted to the UK National Commission for UNESCO, and establish a new management infrastructure to allow for fully coordinated and cohesive management.

This action will ensure that there is an ongoing emphasis to build on past efforts at developing geotourism. Moreover, the underlying ethos of UNESCO Global Geoparks supports the direction of this Strategy – one that explores, develops and identifies the links between the physical heritage (particularly the geological heritage) and all other aspects of the area's natural, cultural and intangible heritage.

The establishment of a new management model will create the basis for a consolidated approach to management and marketing that can leverage the critical mass of the area's assets and experiences in a more relevant manner, while ensuring cohesive development of related recreational opportunities and visitor experiences.

Actions:

- Establish a commitment from NMDDC to proceed with the application.
- Set up a new Management Committee that is appropriately equipped to address the entire area. This Committee should provide the basis for a single, unified management structure and should include all relevant local and regional actors and authorities.
- Continue to work with the Geological Survey of N.I. to prepare a new dossier for submission by October 2019.
- Continue to organise and host events that will increase public and stakeholder awareness of the Aspiring Global Geopark and its international significance.

In the event that partners in Co. Louth wish to reassess their involvement in a cross-border Geopark, there will be the opportunity to resubmit a modified proposal during a revalidation process.

Pursuing alternative designations that will strengthen the identity of the Mourne-Gullion Destination Experience remains an option that should continue to be explored.



Catalyst projects and critical infrastructure

Catalyst Project:

Newcastle signature access attraction to the higher Mournes:

The lack of a flagship experience within the District was noted in virtually all the tourism planning discussions. It is felt that an iconic attraction could significantly strengthen the key propositions associated with the dramatic interplay between the mountains and the coast.

A new uplift facility providing access to the high Mournes, for example, has been in discussion for a number of years. The concept was included within the South East Coast Masterplan and in a more recent Feasibility Study (2014). Further work is now being undertaken to generate and assess proposals for “the sustainable enhancement of access from Newcastle to the mountains and for the broadening of visitor and recreational activity provision, in a way that will provide standout in the tourism market and generate growth in tourism performance”.

Recommendation:

Continue to move forward with the development of an iconic and innovative visitor access attraction that strengthens the overall destination experience of both the coastal route and the mountain.

An attraction of this nature should have broad market appeal and should support a range of activities on the Mourne Mountains – not simply access.

Actions:

- The way forward is likely to be prescribed by the Mourne Mountains Gateway Study that is currently underway. Ideally it will provide the opportunity to develop a strong higher Mournes experience that is enhanced through an innovative mix of activities – from passive enjoyment to active recreation, and from interpretation and storytelling to events and new ways of enjoying the mountains.

Case Study:

The Sea to Sky Gondola rises through Stawamus Chief Provincial Park near Squamish in British Columbia, Canada. The \$25 million project was officially opened in May 2014 – the completion of a project that was first discussed in 2004.

The facility has a 9,000 ft² summit lodge with 6,000 ft² deck, restaurants and gift shop. The 8-10 minute ride provides access to the lodge, the Sky Pilot suspension bridge, 30km of trails (including 2km of ‘stroller-ready’ trails), guided services and viewing platforms. Squamish is a mecca for outdoor recreation activities, particularly mountain biking – the vision behind the Gondola was to broaden the market reach of the area and to strengthen the tourism industry. In 2015 it was anticipated that 300,000 would ride the Gondola. In 2014 the number of visitors to the Visitor Centre in Squamish increased by almost 37% over 2013, the number of buses stopping at the Centre rose by over 40%, web traffic increased by 32%, and hotel occupancy grew by 10%.



© Images: TEAM

Catalyst Project:

Lift assisted access for mountain biking:

Following the recent development of two new national trail centres at Castlewellan and Rostrevor, the Mourne Mountains have become recognised as a key mountain biking destination in Ireland. The hosting of major events including the Irish Cross Country National Point Series at Castlewellan, and the Red Bull Foxhunt and the Irish National Mountain Bike Marathon Championships at Rostrevor have added to the area's status within the mountain biking community.

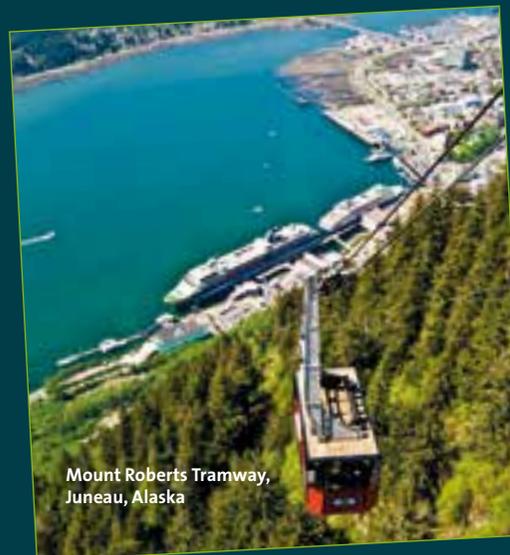
The appeal of the area will increase with the development of a new 'Blue Grade' trail for less experienced riders within Kilbroney Park and Rostrevor Forest – a purpose built trail featuring differing levels of difficulty that will also serve as a skills development or coaching facility. The recent growth of the activity is not only facilitated by the development of new trail infrastructure, but also with the provision of support services, including accommodation options through a number of specialised adventure companies.

With this strong basis for building national and international recognition in mountain biking, this Strategy seeks to maximise the advantage of this key strength with support for further development of critical infrastructure.

Recommendation:

Continue to review critical gaps and opportunities to further develop mountain biking in NMD, including the feasibility of developing lift-serviced access facilities and expanding training facilities at Rostrevor.

This recommendation has the added advantage of opening up access to this area of the higher Mournes for a wider range of visitors. Any uplift facility should be accompanied with further planning for a wider high elevation experience



Mount Roberts Tramway,
Juneau, Alaska

Actions:

- Work with the mountain biking interest groups to assess the feasibility of developing lift-serviced infrastructure to access Slieve Martin. This would strengthen the experience significantly, and would further differentiate NMD as a downhill mountain biking destination and as a site for world downhill championships.
- In assessing the feasibility of a chairlift in the vicinity of Rostrevor, work with the Warrenport Harbour Authority to review the opportunity within the context of developing an on-shore tour for the newly emerging cruise industry. The length of time on shore can be quite limited (the Hebridean Princess stopped for four hours in 2016), and the ability to transport passengers to a significant viewpoint would be a highly attractive proposition.
- Review the proposals for the pump track at Kilbroney and identify its potential to widen the market demand for mountain biking facilities.
- Continue to assess the capacity to strengthen the mountain biking opportunity through trails and related infrastructural developments at Castlewellan and Tollymore Forest Parks.

Catalyst projects and critical infrastructure

Catalyst Project:

The Newry Canal 'Blueway' opportunity:

The restoration of the Newry Canal was raised frequently during the tourism planning discussions. The Newry & Portadown branch of the Inland Waterways Association of Ireland (IWA) has taken the lead on working toward the long-term ambition of restoring the canal and once again joining Carlingford Lough with Lough Neagh. The Canal is the oldest summit level canal in UK/Ireland (1742) and is listed as a Scheduled Monument. The towpath has been restored between Newry and Portadown and is well used as a local and regional recreational asset with approximately 93,000 users per year.

The focus is now on opening up the canal to small boats and canoes between Pontzpass and Lough Neagh – a distance of 21 miles. Armagh, Banbridge and Craigavon Borough Council is currently repairing the first lock at their end. A partnership commitment between Councils to work collaboratively on the initiative would establish the basis for fast-tracking the work and building on the momentum of the work undertaken by the IWA volunteers.

Recommendation:

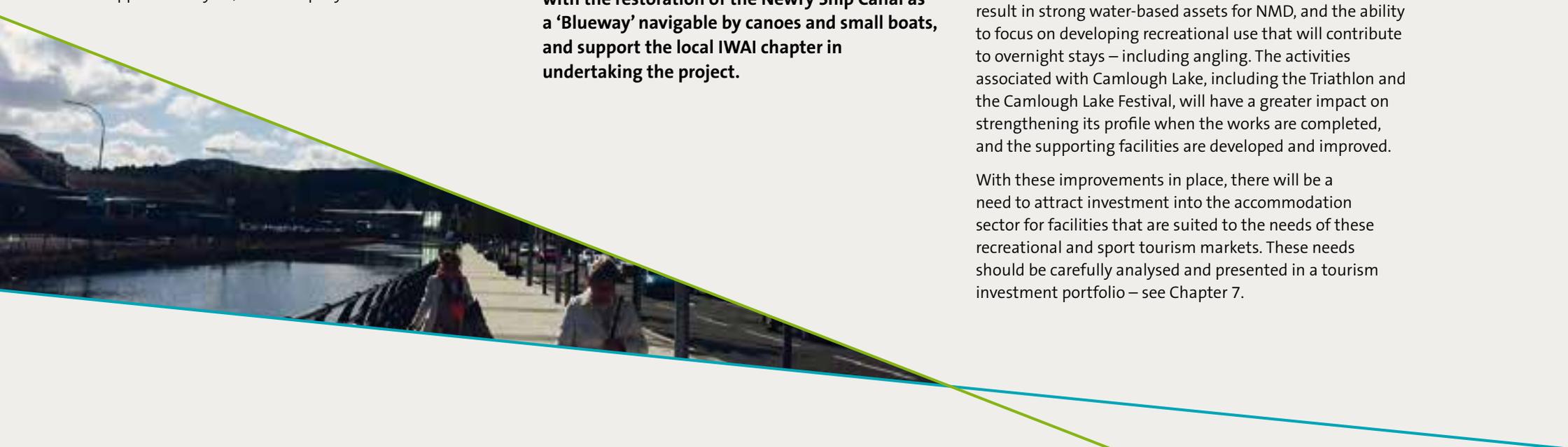
Develop a memorandum of understanding between NMDDC and ABCBC to move forward with the restoration of the Newry Ship Canal as a 'Blueway' navigable by canoes and small boats, and support the local IWA chapter in undertaking the project.

Actions:

- Work with the local IWA chapter to facilitate the dredging of Sand's Mill to Lock 2, including the dredging of Lock 2, and provide steps to portage Lock 2 and 3.
- Undertake an assessment of all other tasks required to make the Canal navigable as a Blueway and develop an action plan to complete the work.
- Continue to explore ways of revealing the underlying stories and industrial heritage associated with the Canal to the visitor. These stories are currently undersold.

The combination of a Blueway and the programme of works that is currently underway on Camlough Lake will result in strong water-based assets for NMD, and the ability to focus on developing recreational use that will contribute to overnight stays – including angling. The activities associated with Camlough Lake, including the Triathlon and the Camlough Lake Festival, will have a greater impact on strengthening its profile when the works are completed, and the supporting facilities are developed and improved.

With these improvements in place, there will be a need to attract investment into the accommodation sector for facilities that are suited to the needs of these recreational and sport tourism markets. These needs should be carefully analysed and presented in a tourism investment portfolio – see Chapter 7.



Catalyst Project:

Connecting with the Great Eastern Greenway:

There are plans to develop the Carlingford Lough Cross Border Greenway which would provide a 13.8 km link from Newry to Carlingford and would add significant value to the existing Newry Canal Towpath as a long distance path. The Omeath to Carlingford Marina section of the Greenway has already been built. The current connections to Carlingford are narrow and difficult for cyclists – a cross-border greenway of this nature would provide a world-class green travel route and would create a total length of 52kms.

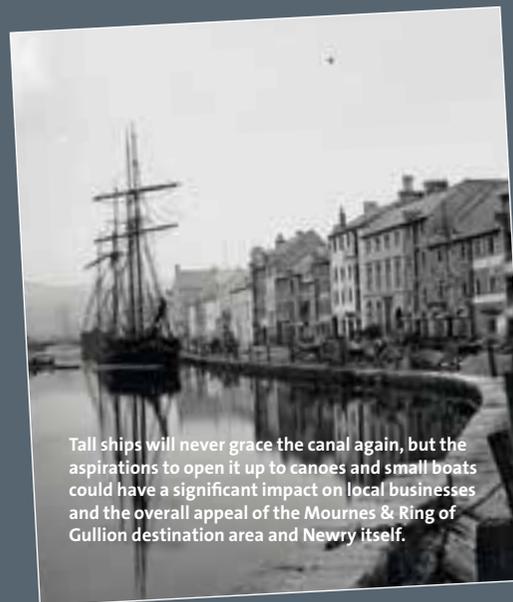
The potential success of creating this linkage can be seen in the usage of the new Omeath to Carlingford section, which rose from 26,000 users in its first year (2013) to 61,500 in 2015. The Newry to Portadown towpath reports approximately 93,000 users per annum.

There are plans to further extend the trail from Greenore to Dundalk along the former rail line, and in time to Dublin. Ultimately the trail could link Belfast to Dublin and would provide a truly EPIC experience.

This potential long-distance Greenway provides impetus for the Narrow Water Bridge project.

The proposed bridge across the top of Carlingford Lough where it meets the Newry River has the added significance of crossing an international border and would be of tourism interest in its own right, as well as providing the critical linkage between the two trail systems in each country, providing it has safe facilities for pedestrian and cycling traffic.

It should be noted that this project aligns with the Department for Infrastructure's Strategic Plan for Greenways – Exercise, Explore, Enjoy (November 2016).



Tall ships will never grace the canal again, but the aspirations to open it up to canoes and small boats could have a significant impact on local businesses and the overall appeal of the Mourne & Ring of Gullion destination area and Newry itself.

Recommendation:

Continue to work on developing the concept of the Great Eastern Greenway through building connectivity between the Newry Canal Towpath and the Omeath to Carlingford Trail.

Actions:

- This initiative has NMDDC support. The first section of this Greenway from Newry Albert Basin to the Weir is under construction – completion of this section will be the initial step in the project.
- Plans to work on the cross-border component will be subject to securing appropriate funds. Efforts to obtain the necessary funding are in progress and should be maintained. This project should continue to benefit from the full support of Council.
- Work with Transport N.I. to explore opportunities applicable to this project arising from the Department for Infrastructure's Strategic Plan for Greenways.

Animation – Bringing the destination to life

While commitment and progress on catalyst projects and critical infrastructure are key to increasing the competitiveness of NMD, the market appeal and the strength of the visitor experience will also be dependent on the implementation of strategies and actions that further ‘animate’ the destination and bring it to life.

The focus will need to be on the following:

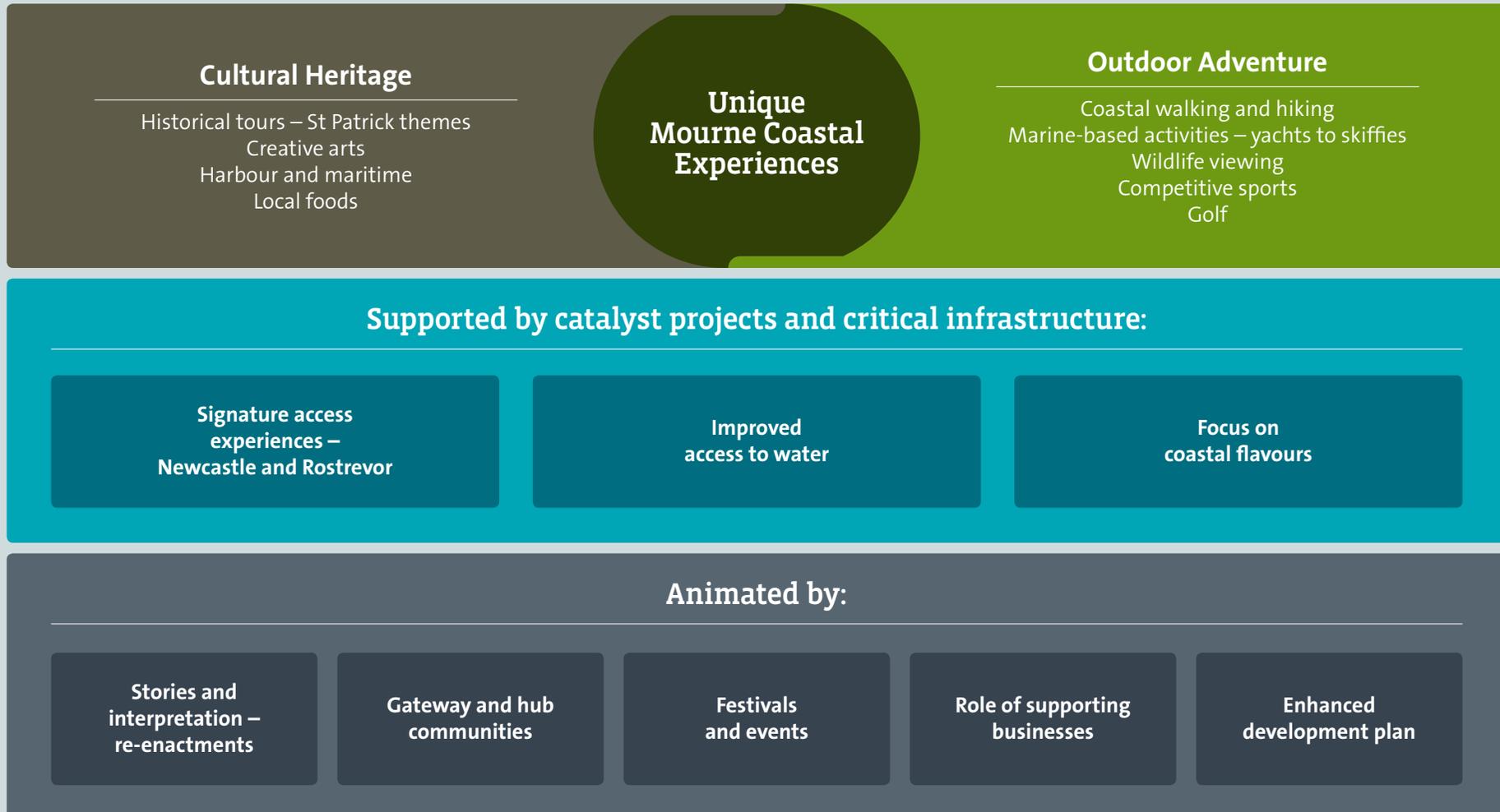
1. Continuing to identify significant **stories** that can be used to enhance existing and new experiences, and can be incorporated into ongoing work on developing interpretive signage, media and related facilities – see Chapter 7.
2. Developing more effective **gateway and hub communities** – see Chapter 6.
3. Expanding the emphasis on **festivals and events**, particularly on a thematic basis where the underlying theme strengthens the positioning of the destination experience – see Chapter 7. An emphasis on festivals and events that have a literary and strong artistic component within the Mourne and Ring of Gullion, for example, will assist in further highlighting the unique cultural heritage of the area and the way to which this is shaped by the landscape.

In particular, the role of festivals that are likely to have a wider regional appeal within the Ring of Gullion area will raise its profile and assist in offsetting the limited domestic market awareness of the area – an issue arising from the era of ‘The Troubles’ and a long period where tourism did not play a part in the local economy.
4. Developing the role of **supporting businesses** is a critical success factor in bringing a destination to life. Businesses need to understand the needs of the visitor and have the capacity to respond effectively. There are many touchpoints between the visitor and the wider community, and each of these encounters needs to reinforce a welcome and a commitment to ensuring that the overall experience has the EPIC hallmarks – experiential, personalised, iconic/immersive, and creative. Chapter 7 outlines initiatives that will assist in strengthening industry as a whole.
5. **Enhancing accessibility** – improving connectivity between trail networks, ensuring that signage and wayfinding markers are in place, enhancing the resilience of path networks, and maintaining adequate public transportation services are important elements in delivering a satisfactory visitor experience.
6. **Experience Development Plan** – further planning and development of visitor experiences are required if the Mourne and Ring of Gullion are going to attract international markets and generate longer stays. An Experience Development Plan will identify the role that individual businesses can take in delivering experiences and in taking advantage of the catalyst projects. This is discussed in Chapter 7.



E P I C

5. A Focus on Destination Experiences – The Mournes Coast



Introduction

The Mourne Coastal Experience stretches from Strangford Lough to Carlingford Lough. This complements the upland experience, and for a long stretch from Newcastle to Warrenpoint, it is an integral part of the Mourne and Ring of Gullion destination experience that is discussed in the preceding chapter.

The route encompasses the Strangford and Lecale Coast and AONB, and embraces much of the St. Patrick story through its proximity to Downpatrick, once connected to the sea and maritime trade. The entire route stretches from Strangford to Warrenpoint.

Here again the shaping of today's landscape owes much to the centuries of previous eras. The compelling nature of the Mourne Coast can be appreciated through a deeper understanding of its unique composite of topographies, fishing villages, wildlife, scenic beauty, and opportunities for outdoor adventure and cultural heritage experiences.



Key Interpretive Themes:

1. Inspirational landscapes and seascapes – mountains, bays, lowlands, drumlins and loughs
2. Granite – industrial heritage
3. Storybook of Ireland – past to present – Kingdom of Ulster, the Vikings, the Normans, the sacking of Downpatrick
4. St. Patrick
5. Maritime heritage
6. Local foods

Substantial effort has already gone into ‘presenting’ the Mourne Coast to the visitor as an extension of the Causeway Coast and in keeping with the emphasis on the Wild Atlantic Way in the Republic of Ireland. However, while specific areas of the coastline have considerable appeal and recognition, such as Strangford Lough and Newcastle, the concept of an integrated and holistic coastal experience has not yet resonated with the market as anticipated.

To address the opportunity, two major planning studies have assessed the coastline from the perspectives of both driving and walking: The Mourne and Strangford Lough Coastal Walking Path Technical and Feasibility Study (2015), and the Mourne Coastal Route Masterplan (2015).

Both recognise the considerable potential to use the coastline as an asset to generate sustainable tourism growth, but not without significant capital infrastructure, a focus on trail connectivity and the development of hubs, an emphasis on aesthetics and the delivery of unique coastal experiences.

The development of the coastline visitor experience has been facilitated by a range of community interest groups, the Mourne Heritage Trust and the Strangford and Lecale Partnership. While each organisation has worked enthusiastically to impact local visitation and to protect and enhance fragile coastal ecosystems, there has not been a coordinated and integrated approach to developing and marketing the Mourne Coastal Experience, other than the Mourne Coastal Route signage and amenity site enhancement programme. This Strategy advocates a stronger emphasis on working collaboratively to develop the entire coastal experience.

A number of catalyst projects and critical infrastructural initiatives already recommended in Chapter 4, will have a direct and beneficial impact on the coastal experience – particularly the projects associated with lift-assisted access to the higher Mournes.

Summary of strengths and weaknesses

Strengths:

- Strong cross-section of tourism assets and related themes from coastal ecology to a diverse range of myths and historical accounts. The St. Patrick theme and the association with the contemporary Game of Thrones are both strong – particularly in the Strangford and Lecale coastal area and immediate hinterland.
- Unique fusion of landscapes – from drumlins, to a backdrop of granite peaks, and from estuarine areas to the open sea. It is this fusion that has long attracted the domestic summer market – the primary market for the area.
- Rich assortment of festivals and events – from St. Patrick’s Festival to the Newcastle Festival of Flight and the Hallowtides Festival, together with maritime and marine themed events such as the Strangford Lough Festival.

- Diverse range of coastal geography – from Blue Flag beaches and stretches of strand at Murlough to small and intimate beaches and inlets – with many offering activities that are fairly specific to a particular location – such as jet-skiing at Killough, and coasteering and bouldering at Bloody Bridge.
- A strong focus on competitive marine-based events – from yachting to the Skiffie Worlds.
- A significant range of other outdoor activities that are distinctive to the area, including golf and the world renown Royal County Down, horseracing at Downpatrick, and a range of motor sports at Bishopscourt Racing Circuit by Ballyhoran.
- An association with adventure, endurance and competition – this has been reinforced by the designation of Newcastle as the finishing line for the 26 Extreme Coast to Coast Multisport Race Across Ireland in 2017.
- An emerging wedding market and a significant yachting market.
- Significant potential to build local food experiences.

Weaknesses:

- Lack of connectivity in many aspects of the management and delivery of the coastal experience – in management structures, linkages between trails including canoe trails, and in the limited networking and collaboration between business operators.
- The digital presentation of the coastal experience is fragmented.
- Weak orientation of the visitor, and limited effort to ‘move the visitor along the coastline experience’.
- Beach access issues along Carlingford Lough and boating access issues in Strangford Lough.
- Concerns regarding the condition of rural roads and signage related issues.
- Traffic congestion at peak season and under provision of parking in Newcastle.
- Limited availability of accommodation, particularly in Downpatrick, and a need for new and innovative camping options.
- Limited boat access for visitors with physical disabilities.



Building on previous plans

A substantial amount of preparatory planning work has been undertaken already for development of the coastal driving route and walking trail. The Mourne Coastal Route Masterplan and the Mourne and Strangford Lough Coastal Walking Path Technical and Feasibility Study should continue to be used as a basis for providing direction on infrastructural and connectivity priorities that will strengthen the potential of the coastline to be more than simply a traditional summer vacation base.

As implementation of these plans continues to move forward, it is important to stress the need for an ongoing programme of action on the aesthetics of place. Litter and anti-graffiti programmes and maintenance of safe public space should be regarded as priorities in developing not just the coast, but all of NMD as a tourism destination.

While improving the physical facilities and trail infrastructure for visitors is an important aspect of strengthening the Mourne Coastal Experience,

...it will also be essential to work on developing thematic experiences that animate the coastline...

and generate longer stays, repeat business and increased expenditure. Fáilte Ireland's focus on the preparation of experience development plans over and above all the marketing and infrastructural development work that has taken place along the Wild Atlantic Way, highlights the necessity of working with tourism businesses and local communities to encourage them in developing an EPIC (experiential, personalised, iconic/immersive and creative) approach to delivering experiences.

This focus underlies the recommendation in Chapter 7 to develop Visitor Experience Development Plans and will be particularly important in providing a new framework of understanding on how industry should work together to bring the coast to life as a destination experience.

Indeed, the value of investing in infrastructure will only be fully realised when this experiential focus is adopted as an integral element of creating a competitive coastal experience that will stand out in the marketplace.

Catalyst projects and critical infrastructure

Catalyst Project:

Improving access to water:

In assessing the coastline, attention should focus on a number of particular areas where access to water for boats or to beaches needs to be improved. The coastline has the potential for offering a range of water-based activities, but its success in attracting visitors is dependent on ensuring that access and related facilities are adequate.



Recommendation:

Undertake an inventory of access to the coastline and associated current and potential activities. Identify strategies to improve access to water where clear tourism benefits can be anticipated.

Actions:

- Identify and map all existing and potential coastal activities that are dependent on good access to the coastline or to water, and undertake a gap analysis. Good boat access to Strangford Lough is problematic and is constraining the growth of recreational boating and yachting in the area. Similarly, beach access is limited along the shores of Carlingford Lough (e.g. to Rostrevor beach) and should be addressed.
- Assess the mooring facilities for transient boat traffic and related transportation linkages as part of the mapping exercise and gap analysis. Strangford Lough is known to attract higher-value yachting visitors, but these visitors are limited in their ability to visit attractions and settlement hubs through the lack of shuttle transportation. This analysis will highlight infrastructural requirements that can then be prioritised and addressed as funding permits.
- As the Lecale Rambler no longer offers its services in the Strangford Lecale area, it will be necessary to reassess the feasibility of reinstating a public transportation service and work with local businesses to see how a new service could be made viable.
- Onshore facilities and aesthetics need to be adequate to meet the needs of today's boating market. This includes assessing the facilities that will be required to grow the pocket cruise market at Warrenpoint. Equally the needs of less able-bodied visitors should be considered, and action should be taken to address potential – e.g. the Mourne All-Ability Sailing Club proposals to improve access to boats in Newcastle Harbour should be pursued.

Case Study:

In 2015 Scotland launched an ambitious new strategy to ‘awaken the giant’ – Scotland’s marine tourism sector.

Through improving the experience of visitors, building facilities and skills within the sector, and promoting the events and activities available on and around the coastline, the strategy aims to grow the total value of marine tourism by 25% over five years – from £360 million to £450 million by 2020.

The Strategy has three core themes – all of which are relevant to improving the Mourne Coastal Experience.

1. **Providing authentic experiences** – through improving linkages with the wider tourism offering and working more effectively with coastal communities to leverage existing events and to develop and package high quality themed terrestrial and marine experiences. The ability to grow sporting events through a more strategic approach is also regarded as a significant opportunity going forward.
2. **Improving the customer journey** – through helping businesses cater for the needs of marine visitors more effectively, and through improving digital information and overall booking capabilities. These activities include refining a Marine Host package to be aligned to WorldHost, to equip industry with appropriate training and accreditation.
3. **Building capabilities** – through a range of product development, marketing and skills development initiatives. This includes an emphasis on attracting investment to improve infrastructure – for example, the provision of adequate moorings, safe havens and step ashore facilities around the coast, inland waterways and islands of Scotland to ensure the visitor is able to enjoy each marine destination.

As with the NMD Strategy, success of Scotland’s marine strategy is seen to be dependent on a partnership approach, and a commitment of the entire Scottish marine tourism industry to continually improve the product and visitor experience, and to work together to promote the marine tourism experience at every opportunity.



Catalyst projects and critical infrastructure

Catalyst Project:

Focus on coastal flavours:

Culinary tourism has seen unprecedented growth in many destinations as visitors seek to connect with local cultures, and the tourism industry responds with a recognition that local foods are a way of portraying the essence of place. Tourism N.I. has sought to benefit from this trend through designating 2016 the N.I. Year of Food and Drink.

Actions already taken to boost culinary tourism include the launch of the Mourne Food Cycle Trail, the Strangford Lough & Lecale Partnership's Seafood Report, and the work of the Mourne Seafood Cookery School. While there are many restaurants recognised for serving excellent food, more could be done to differentiate the offer by focusing on seafood and authentic flavours and the creation of unique experiences relating to the enjoyment of food.

The figure opposite illustrates what is involved in delivering EPIC and memorable food experiences – an emphasis on sourcing local and authentic high quality product; telling the story of local foods; and providing world-class services with genuine local hospitality.

Ultimately, creating and profiling local food experiences involves much more than developing a brochure – it requires investing considerable time and energy into establishing meaningful networks and strong linkages between all who are involved – from the food producer all the way through the supply chain to the visitor – **it is about building a vision and a commitment to deliver all aspects of a memorable food experience.**



Focus on coastal flavours (continued):

Recommendation:

Raise the profile of coastal flavours through working closely with the food and drink sector and related businesses to develop authentic Mourne coastal flavours experiences.

Actions:

- Establish a local food/coastal flavours network to assist in creating dialogue and bringing the various stakeholders together – chefs, restaurants, farmers, seafood producers, educational institutions, specialised retailers, artisan food specialists, and local distributors. An active network will be essential in building the inter-connections that are needed to create experiences that truly local and memorable.
- Develop a Mourne Coastal Flavours Trail that will encourage visitors to discover fresh local flavours as they move along the coastline.

This can be developed as a membership programme which should be based on criteria to which participants agree to adhere.

Examples include:

Commitment to offering an experiential component that highlights the food and drink's local connections;

Consistent and posted hours;

Open for a predefined minimum season;

Agreement to train staff on delivering the experiential component.

- Review and promote opportunities to develop unique culinary events throughout the year that highlight the seasonality of coastal flavours.
- Continue showcasing local foods at all events.
- Work with producers to create coastal seafood experiences that are unique to the coastal communities.
- Create taste events that bring local food and drink providers together to provide local and regional visitors with an immersive experience.

Case Study:

The Feast of Field events in British Columbia are annual sell-outs. Each event is a four hour wandering gourmet harvest festival that highlights the connections between farmers and chefs, field and table, and between farm folks and city folks. With a wine glass and linen napkin in hand, guests stroll across a farmer's field, traveling from tent to tent (sometimes through the barn, past the tractor or around the chicken coup) listening to live music, and tasting gourmet creations from BC top chefs, farmers, fishers, ranchers, food artisans, vintners, brewers, distillers and other beverage producers.

Feast of Fields only features local producers, artisans, winemakers, brewers and distillers, and only those chefs that have existing relationships with local farmers and producers. For those businesses, Feast of Fields offers a great way to highlight their commitment to local, sustainable food and promote their business to customers that truly love and support the local food movement.

www.feastoffields.com



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As with the Mourne and Ring of Gullion destination experience, the Mourne Coastal Experience will benefit considerably from an emphasis on animating the destination through:

- Stories and interpretation, including re-enactments;
- Vibrant gateway and hub communities;
- Festivals and events;
- Appropriate services from local businesses; and,
- The preparation of a Visitor Experience Development Plan.

These elements are reviewed in the following chapters.

6. Developing Gateway and Hub Communities

The role of gateway and hub communities

The towns and villages play a significant part in bringing the overall destination experience to life. They have a role either as prominent gateways to an upland or coastal experience, or as smaller service hubs within a wider destination area. This chapter provides a brief overview of significance, issues and priorities for Downpatrick, Newcastle, Newry, Warrenpoint/Rostrevor, and the Crossmaglen area in relation to their gateway role.

This role entails:

- Orienting the visitor and servicing their information needs;
- Providing a 'destination experience' in their own right through attractions, activities, evening entertainment, retail and related theming;
- Servicing hospitality needs – restaurants, cafes, pubs and accommodations.

Indeed these roles are not just unique to the towns that have been listed, but are applicable to all communities.

Sense of place – a cross-government priority

The success of the gateway and hub communities as part of the destination experience will partially depend on their individual personality, geographic setting, and sense of place. Most of the communities have Masterplans, with many of these plans including initiatives that contribute directly to strengthening the town as a tourism destination. Implementation of these Masterplans will play a key role in enhancing the competitiveness of NMD as a destination and in strengthening the communities as gateways and smaller hubs.

The Newry Masterplan emphasises the importance of the public realm and defines it as the outdoor areas that are accessible to the public. This is a principle that is applicable to public space in all communities. To be regarded as attractive, there is a need to ensure that parks, squares, streets, car parks and other more incidental spaces together send out a positive message and contribute to a strong sense of place.

Maintaining the quality of the public realm does not simply relate to enhancement projects and restoration schemes. The ongoing maintenance of streetscape, the cleanliness of open spaces and the absence of weeds and litter are all areas of activity that contribute to creating strong destinations.

Similarly, empty shop fronts and derelict buildings can detract from the destination experience and can send a very mixed message to the visitor. Schemes designed to attract new businesses and convert empty upper floors into residential units will all contribute to injecting a stronger sense of life into the town centres, particularly in the evening.

Clearly a cross-government commitment to tourism will require all NMDDC divisions to be involved in different ways in developing healthy, vibrant and safe town centres – for visitor and resident alike.

The remainder of this chapter looks at the key gateway communities and identifies a range of specific initiatives that will strengthen their position as destinations and as gateways. The discussion is a high-level overview and is not based on a detailed analysis of each community.

Downpatrick

Significance:

Downpatrick is one of Ireland's earliest settlements and has many significant archeological sites within its vicinity.

Its unique point of identity is its rich association with the story of St. Patrick, and it has become recognised as the 'cradle of Irish Christianity'.

St. Patrick landed in the Downpatrick/Lecale area in 432AD, built his first church at Saul, and after all his travels, he is purported to have died there and his grave is in the grounds of the Cathedral. The story of St. Patrick is told largely through the St. Patrick Centre. The Down County Museum presents the wider history of County Down through its exhibits and artefacts.

Issues:

- Visitors do not stay long. The key constraint is the inadequate accommodation supply. While the town benefits from significant coach traffic to the St. Patrick Centre, it cannot host these visitors overnight.
- The evening economy remains weak and restaurant provision is limited.
- The town centre is congested with the combination of local and through traffic.
- Despite regeneration work, the town has a tired look to it.
- While the St. Patrick theme is the town's point of differentiation, there is little activity to tell the story in the town, beyond the Centre. There is no cohesive strategy in place on how to present this wider story to the visitor, and 'fitting the pieces' together at times can be difficult for the independent traveller. Considerable effort has been put into developing the regional St. Patrick story in the past through the work of Tourism N.I. on a driving trail, and the conceptual development of St. Patrick's Way – a walking trail between Downpatrick and Armagh. However, the walking trail includes sections on roads and both trails had limited uptake. In general, despite recognising the value of the theme, the local tourism industry has yet to fully embrace an integrated approach to delivering a memorable experience.



Downpatrick

Priorities:

- Continue to work on attracting investment for the **hotel sector**. This infrastructure gap has been recognised in various studies and needs to be addressed if the town is to be successful in generating overnight stays. The coach sector has expressed an interest in staying overnight, and the needs of this market must be kept in mind when addressing this gap.

In assessing the gaps in accommodation, consider the concept of the WELL-BEING hotel outlined in the 2014 study on Maximising The Tourism Potential of St Patrick in the Communities of Armagh and Downpatrick. Creating an accommodation experience that encompasses the principles of 'retreat, contemplation, peace and regeneration of the spirit' will fit with the town's St. Patrick theme.

- **The St. Patrick theme** needs to be offered to the visitor in a more consumable way. Currently a local entrepreneur is working on developing a regular tour that will take in a range of local sites, including St. Patrick's Landing. This tour could play a key role in developing and delivering an actual **'joined-up' experience** and would be attractive to the out-of-country markets. An initiative of this nature could be a local catalyst that is needed for more effective storytelling from other supportive businesses, such as the B&B sector.

In joining up the experience, consideration should be given to developing a St. Patrick's circular trail within the Downpatrick-Lecale area that ties together the various key Christian heritage assets within this area.

The St. Patrick Festival that has been planned for the commemorative year of St. Patrick in 2017 has the potential to make the underlying story more meaningful through its emphasis on who Patricius/St. Patrick was, his values, his life, and his legacy. The festival is seeking to tie the story into the wider story of Ireland's spirituality from the pre-Christian era through to contemporary times. This broader context is likely to resonate more effectively with a range of Culturally Curious audiences – it will provide a different perspective to the current approach, while still enhancing the significance of the central theme of St. Patrick.

Similarly, developing an approach that ties the story into a broader offering that incorporates outdoor activities, music, contemporary arts and culture, and local foods will create a stronger experience and will appeal to markets other than the Culturally Curious.

Tying the wider story together remains important, and will require ongoing collaborative efforts with partners, including ABCBC.

The success of the 2017 programme should be carefully monitored, including a survey of participants. The programme has the potential of offering a model for events that could run year round.

The concept of St. Patrick's Way still offers potential to attract markets such as the Great Escapers. However, it only has real value if it is an off-road trail. Efforts should continue to assess whether there is an opportunity to expand the off-road component.

The 2014 study on maximising the tourism potential of St Patrick, has a range of potential actions that are designed to animate the story and to take it beyond the St. Patrick Centre. These actions remain relevant – for example, further developing a themed rail experience that brings elements of the story together.

Downpatrick

Priorities:

- **Visitor orientation** remains a priority in Downpatrick. Although there is a well-stocked visitor information centre, there needs to be a stronger emphasis on assisting the visitor with understanding how to experience the St. Patrick story and how to connect with the wider area. The Visitor Centre staff need to have a comprehensive awareness of the two key destination experiences within NMD – the Mourne and the Ring of Gullion, and the Mourne Coastal Experience, and be able to demonstrate Downpatrick’s gateway role to these wider destination experiences.

The St. Patrick Centre has a pivotal role to play in assisting visitors understand how they can experience the story outside of the Centre.

- An emphasis on building a **vibrant evening economy and a strong sense of place** needs to be maintained. The look and feel of the community should be appraised from the visitor’s perspective and actions to address concerns (litter, safety and lighting, arrival points such as the bus station) should be addressed.
- In addition to St. Patrick, Downpatrick is known for its **horseracing**. This unique attribute needs to be given a higher level of profile and can be tied into the many other competitive events that are hosted within NMD, including the motorsports at Bishopscourt Racing Circuit.



Newcastle

Significance:

Newcastle is a gateway to the Mourne and Ring of Gullion destination experience, and for many visitors it is a core hub of the Mourne Coastal Experience. The town has a long history as a summer holiday resort for N.I. residents and a day-trip location for short visits. It has international recognition as the setting for the Royal County Down Golf Club, and the Slieve Donard Hotel has become an iconic hotel in N.I.

Substantial investment has been made recently in enhancing the public realm with the work that has been done on redesigning the promenade. The well-recognised backdrop has been made famous by the lyrics of Percy French: “...where the mountains of Mourne sweep down to the sea”, and the town has been described as one of the most magically positioned seaside resorts in the British Isles⁸. With its unique geography, Newcastle presents an impressive setting for its annual Festival of Flight.

Issues:

- The town is heavily reliant on good weather. As a result of limited wet-weather facilities, it has a high degree of seasonality. This is exacerbated by its strong association with summer fun – sea and sand holidays.
- Newcastle offers a starting point for many visitors that are on day hikes. However, despite the high number of day trippers, the expenditure left behind is limited.

- The activity base and available opportunities for spontaneous participation in outdoor land and marine-based activities is less sophisticated than the Causeway Coastal Route.
- Traffic congestion and parking issues are significant at peak season.

Priorities:

- The destination appeal and the level of expenditure within the community could be significantly enhanced through the **development of new amenities**. In particular the **signature access attraction** already highlighted in Chapter 4 would be a game-changer for the town and should be regarded as both a local and regional priority.

Wet weather facilities and enhanced recreational and family leisure amenities have been identified in two masterplans⁹ as potential projects for Donard Park and Newcastle Islands Park.

Again, these new facilities along with the access attraction, would motivate longer stays and a greater level of expenditure, and would likely attract new markets and increased visitor numbers, while also offsetting many of the issues associated with seasonality.

- As a gateway community to both the coast and the mountains, Newcastle is in a unique and strategic position to service visitors – perhaps more than any other community within NMD. To be effective, it has to continue to ‘grow into’ this role and **become a dedicated information and trip planning base for visitors looking to explore and experience either setting**.
- Alongside the provision of information for trip planning, Newcastle should be regarded as **a hub for social and informational events about the outdoors** – whether this is through hosting forums or special release adventure films, the town should seek to create events that will attract Social Energisers with a passion for the outdoors and being with like-minded people.
- With the development of new facilities, consideration should be given to developing **innovative space for interpretation** and telling the regional story. This can co-exist with a trip planning function.
- As noted in the Mourne Coastal Route Masterplan, there is scope to enhance Newcastle’s reputation in the delivery of **short-timed activities** (1-2 hours), particularly marine-based activities and boat tours.

As with all NMD communities, there is a need to continue strengthening the **evening economy**. Similarly, there is room to expand and improve the serviced accommodation base.

- If Newcastle is to enhance its role as a gateway destination, the issues relating to **parking and traffic congestion** will need to be addressed.

Newry

Significance:

The City of Newry is the largest settlement in NMD and is located on the Belfast to Dublin corridor. It acts as the primary gateway to the Mourne and Ring of Gullion from the Republic of Ireland. The city has a long history as a medieval town, an industrial port with the oldest summit level canal in Ireland and the UK, and now the administrative centre of NMD. With its rich maritime and industrial heritage, its literary association with writers such as Jonathan Swift, its retail and hospitality base, and its close proximity to two AONBs, Newry is well positioned to fulfil its role as a major gateway.

Issues:

- The City lacks a true identity as a visitor destination.
- There are issues associated with parking (particularly for coaches), ease of navigation and related traffic congestion, availability of good public toilets, accessibility of the tourist information centre, and general aesthetics associated with the public realm.
- The community has yet to maximise key local assets such as the Newry Ship Canal.

Priorities:

- The underlying theme of the Newry City Centre Masterplan is regeneration. Implementation of this masterplan will make a significant difference to the visitor appeal of the city – particularly if the waterfront areas are substantially regenerated given their unique character.
- The opening up of the Newry Ship Canal to small boats and canoes/kayaks will animate the city centre and will attract a new segment of visitors to the area.
- Likewise, linking the Newry Canal Towpath with the greenway to Carlingford will open up new interest in visiting Newry.
- Newry has growing strengths as an arts and cultural hub. This needs to be integrated more effectively into the tourism offering in the form of short activity breaks, packaged with complementary outdoor activities or culinary offers.
- Improving the navigability and traffic flow of the area, including signage, will be advantageous for the tourism industry. Various transportation options are under consideration, including the Southern Relief Road. The ultimate focus is on easing traffic flow within the wider region and improving the visitor's ability to readily navigate around and through the city and its immediate hinterland.

- The development of a stronger gateway community can be further enhanced through:

A strengthened evening economy;

Additional higher-end accommodation within the city centre;

Access to good information and booking services – this will become critical in the event of the Mourne and Ring of Gullion area being successful in gaining designation as a Geopark.

- The Masterplan's vision of developing a city that is international, welcoming, healthy and competitive is entirely relevant to its role as a gateway. In addition, the mandate of the Business Improvement District and its activities will assist in strengthening Newry as a major gateway community.



Warrenpoint and Rostrevor

Significance:

These communities, like Newcastle, offer the rare combination of mountains and sea, and the opportunity to build a tourism industry that is based on both the coastal and upland experiences. Rostrevor has firmly established its reputation for mountain biking, while at the same time enjoying a strong and mystical association with the Tales of Narnia and C.S. Lewis.

The stories that underlie these communities are rich and diverse – they speak of legendary and recent giants, Napoleonic major-generals, and the poignant goodbyes as many fled from famine in the mid nineteenth century and sailed to the New Country.

Today, Warrenpoint welcomes visitors who arrive by sea, by ferry or by road. Together these communities and many other coastal hubs, such as Strangford, Ardglass, Kilkeel, and Annalong contribute to a unique visitor experience that is based on an ability to observe authentic coastal lifestyles and experience the diversity of local cultures.

Issues:

- The aesthetics of Warrenpoint marina and port detract from the experience of arriving by sea.
- The Narrow Water Castle is under-utilised – the visitor information services are not always available on public holidays.
- While only three cruise ships have arrived to date, the itineraries that were offered took the visitors out of NMD.
- Piecemeal and incremental development of visitor infrastructure and services in Rostrevor Forest and Kilbroney resulting in less than optimum visitor flow.

Priorities:

- Explore opportunities to **increase the number of arrivals by cruise ship**, with a particular focus on smaller pocket cruises.
- **Develop a series of land and water-based itineraries** that would provide short but memorable experiences of the coastal and mountain environments for cruise passengers, and would be an alternative to an itinerary that takes visitors to Belfast.
- There is scope to develop other **marine-based activities in Carlingford Lough** – such as eco-tourism based boat tours, canoeing and kayaking guided tours.

- **Aesthetic improvements** to the port and marina area.
- **Facilities for cyclists** – with the potential development of the Great Eastern Greenway, there will be an increase in cyclists. This will generate new demand for a range of services, including accommodation services that are 'bike friendly'. Similarly, with the growth of mountain biking, the demand for accommodation that meets the needs of mountain bikes (repair and cleaning area, safe storage etc.) will increase.
- Position the **Narrow Water Bridge project** as an integral infrastructural element of the Great Eastern Greenway project – the bridge would add significant value to this project.
- Implementation of the recommendations in the **Kilbroney Park and Rostrevor Forest Masterplan** and further development of the mountain bike offering as identified in Chapter 4.



Crossmaglen and surrounding area

Significance:

Crossmaglen holds a strategic gateway location into NMD and the Ring of Gullion area from South Armagh, with easy access from the M1/A1 Dublin to Belfast arterial route. The town is built around a central square (reputed to be the largest in Ireland) which gives it a distinctive identity.

The area has striking geological, landscape and archeological heritage, and has a stronger association with the 'story of Ireland' and its myths and legends than many other established destinations within NMD or indeed Ireland.

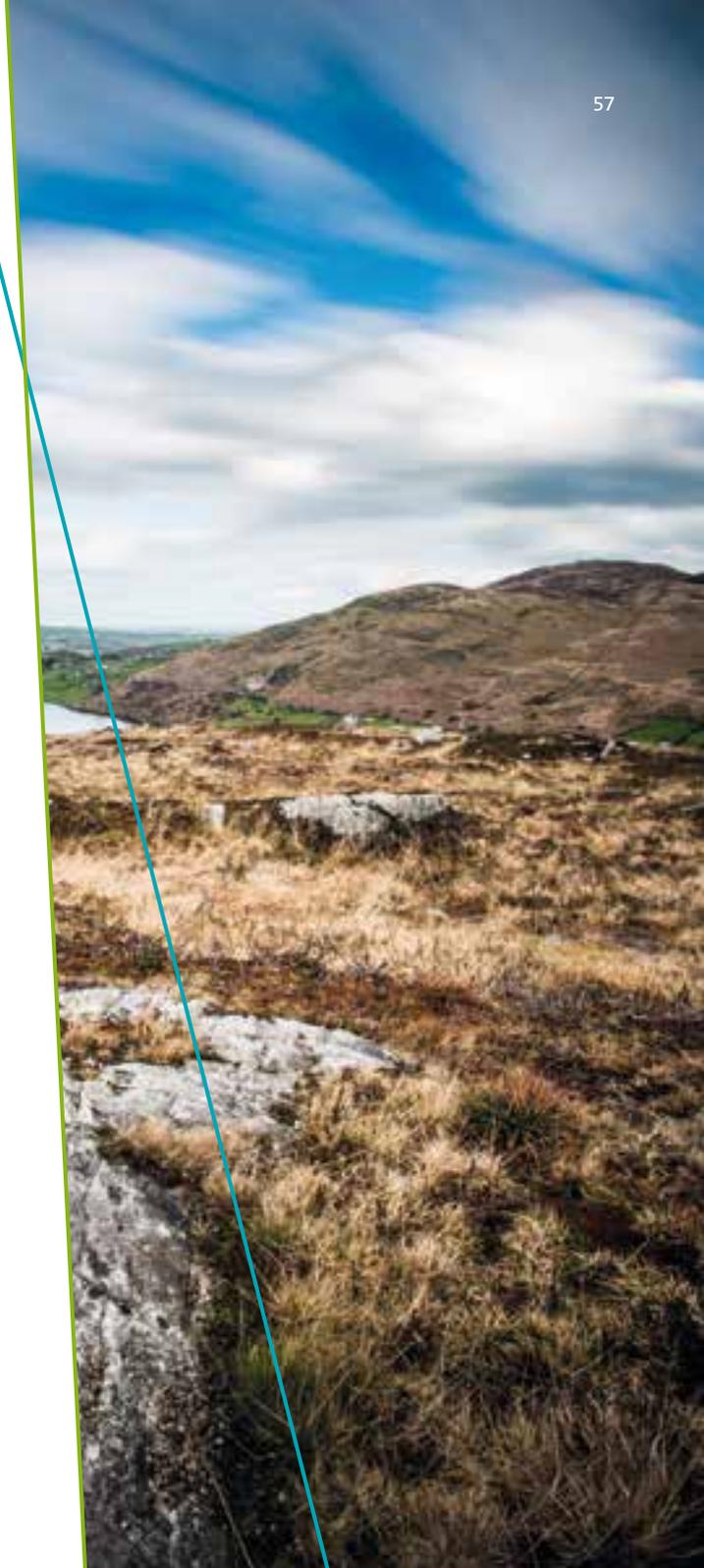
Crossmaglen is particularly well known in the field of Gaelic football and the town regularly plays host to visiting teams and spectators. The surrounding area is known for its music, poetry and story telling.

Issues:

- During the era of 'the Troubles' tourism was non-existent in the Crossmaglen vicinity and the town still struggles to some extent with market perceptions that are tainted with a negative image. The N.I. domestic market is only slowly discovering the scenic beauty of the area and the charm of Crossmaglen.
- The South Armagh area is less developed than other gateway areas from the perspective of road network, signage, mobile coverage, and availability of accommodation and camping facilities.

Priorities:

- Continue to build experiences that highlight the local arts, culture and heritage and identify ways of raising the profile of South Armagh in the domestic market through innovative short activity breaks.
- The area is likely to benefit from the recent announcement of the 4-star hotel and wellness centre at Killeavy Castle – a project that will raise market awareness of South Armagh and create a stronger association with health and wellness.
- Continue to build on the partnerships with Monaghan and Louth County Councils to enhance the cross-cutting stories, myths and legends across events, arts and cultural activities, outdoor recreation and water-based activities.



7. Critical Success Factors

Introduction

The direction of this Strategy has been shaped by the 2021 vision statement:

“Newry, Mourne & Down is a premier, year-round mountain and maritime destination in Ireland recognised for its EPIC experiences in outdoor adventure, its rich tapestry of cultural heritage, myths and unique stories, and its authentic local life.”

To achieve this vision and the underlying goal of a 6% annual growth rate will require doing business differently. An investment in catalyst projects and critical infrastructure creates the framework for establishing stronger destinations, but that will not be sufficient in itself.

The destination experiences that have been presented in this strategy will only come to life for the visitor if these investments are supported consistently by three critical success factors:

1. A focus on creating ‘EPIC’ destination experiences and story-telling;
2. A joined-up approach in relation to all aspects of destination management – product development, infrastructure, leadership and collaboration; and,
3. A compelling market presence and position.

This chapter outlines what is involved in developing a **new mindset for the delivery of tourism.**

Tourism is everyone’s business. NMD cannot be a premier destination in Ireland without everyone understanding the significance of tourism – its importance in creating jobs; diversifying the rural economy; ensuring the viability of smaller community businesses; celebrating local cultural heritage values; providing a rationale for maintaining the integrity of landscapes and ecosystems; and, creating a business case for investing in community infrastructure and sense of place.

A focus on creating ‘EPIC’ destination experiences and story-telling

The growing demand for experiences and immersive connections with local culture has resulted in destinations increasingly looking at ways of engaging the visitor more effectively. Visitors that are truly engaged tend to stay longer and spend more on a trip.

Storytelling has become a key component of building experiences. An experience should change the way the visitor looks at and feels about the destination. The underlying stories bring the destination to life – they create personality and give meaning and significance to place. Visitors can remember good stories and how an experience made them feel long after other memories of a trip have faded.

NMD is a land of myths and stories. These stories have the potential to differentiate the destination experiences in a way that is unique in N.I. The stories relate to all aspects of the District’s cultural and natural heritage. Building new experiences and augmenting existing activities will require a strategic approach to developing this experiential focus – one that involves planning and capacity building.

The following recommendations are designed to assist NMDDC and the wider tourism industry to make the shift away from offering a list of activities to do and sites to see, toward an approach that allows the visitor to learn, participate and engage in an emotional journey within the destination.

Recommendation:

NMDDC will support the development of an experiential focus and will work with industry to build destination experiences that are distinctive and of sufficient scale and significance to provide international ‘cut-through’ in the marketplace. This will include the preparation of Experience Development Plans.

Actions:

- Begin the process of **collecting and developing a database of stories**. There are many stories associated with NMD, and a number are already being used to add value to existing activities such as tour guiding. The process of creating an inventory will assist in identifying key themes, and sites and artefacts that are directly linked to the story. The inventory should include the myths, the known historical accounts, materials on the natural heritage – the geology, the topography and its relationship to land-use through time to the present, and the biodiversity and ecosystems. Work with academics and other experts to build a comprehensive understanding of NMD.
- It is recognised that stories can be politically sensitive, particularly with regard to telling the ‘story of Ireland’, and such stories will need to be handled respectfully. Ultimately there needs to be some degree of consensus on the stories that a community wishes to share.



A focus on creating ‘EPIC’ destination experiences and story-telling

- Prepare two Experience Development Plans:

The Mourne and Ring of Gullion Destination Experience Development Plan;

The Mourne Coast Experience Development Plan – to include Downpatrick and its linkages with the coast and Lecale through the life and heritage of St. Patrick, and other relevant historical accounts.

Each plan should focus on identifying key themes that will unify the destination experience and ways of invigorating existing activities. The Plans should assist business operators in understanding how to adopt a different approach that will enable them to align to the key destination themes in a more effective manner.

Establish Working Groups for each planning process. These groups should include key stakeholders and leading business operators from within the destination area. The participants will need to be capable of championing a new approach and/or trail blazing with the adoption of a stronger experiential focus in their own business activities.

Upon completion of the Plan, review the composition of the Working Group and transition to an Implementation Committee that will oversee implementation of each plan. Ensure that members of the Committee have the passion and capacity to do so effectively.

- Review existing and proposed **festivals and events** against the context of this strategy and the new Experience Development Plans. Festivals and events should be used strategically to enhance the positioning of NMD – in other words to support ‘the headline’, mountains, myths and maritime, and the underlying themes:

Outdoor adventures to challenge and refresh the body, spirit and mind

Unique cultural heritage in inspirational settings

The storybook of Ireland

- Festivals and events play a very significant role in animating the destination and in generating growth in visitor numbers, particularly in shoulder seasons. NMDDC should establish new criteria for supporting community event funding proposals on the basis of the event’s relevance to key underlying themes and stories and to the region’s core focus on outdoor adventure.
- Explore entrepreneurial private sector proposals to animate areas through **interpretive re-enactments** of history. Again, establish clear criteria to ensure that such regular or one-time events are in alignment with this strategy and the proposed Experience Development Plans.
- Work with the AONB partnerships to develop a single and **unified guide training programme** and develop a more visible **visitor-facing guiding service**.



A joined-up approach in relation to all aspects of destination management

The current approach to destination management, development and marketing has been very fragmented, and has resulted in both gaps and duplication. The need for a 'joined-up' approach relates to product development, infrastructure, leadership and collaboration.

Without adopting this approach, little is likely to change in the short-term, and growth of the tourism economy will remain hesitant. This critical success factor is discussed in two different contexts – firstly, in relation to product development and infrastructure; and, secondly in relation to leadership and collaboration.

1. Product development and infrastructure

There is a need to adopt a more holistic perspective to the development of recreational opportunities and infrastructure that supports the growth of tourism within NMD. While the issues and opportunities of the different destination areas will vary, it is important to assess them against a wider backdrop of the overall District and its linkages with neighbouring Councils both North and South.

Recommendation:

Review supporting infrastructural requirements for tourism in NMD and prepare or promote appropriate mechanisms to respond to these requirements.

Actions:

- Assess the **connectivity of the District in terms of public transportation**. This should include NMDDC looking at:

The viability of reinstating the services that the **Lecale Rambler** and **Slieve Gullion Rambler** offered (at least in peak season).

The need **cyclists and mountain bikers may have for transportation services to trail heads**.

The condition and adequacy of roads and related maintenance issues on routes that tend to be popular driving or cycling routes, including the A2. This assessment should include a signage audit and a review of facilities at key viewpoints and lay-bys. A visitor-centric perspective is particularly important in undertaking this work. (Transport N.I. Policy RSPPG EO29 identifies the roles of the various partners with regard to different types of signs).

Issues associated with traffic congestion and parking, particularly within gateway communities. This review will include looking at Newry's Southern Relief Road project.

Opportunities associated with the **Greenore-Greencastle ferry crossing** – assuming that it is in service for 2017.

One particular initiative that should be pursued with N.I. Water, is the option of providing coach access to the **Silent Valley Reservoir**. This would assist in maintaining the economic viability of the café and related facilities.

- Assess the connectivity of the District in terms of **Wi-Fi and broadband speed**, and identify the areas with challenges. Access to Wi-Fi is an important consideration for international visitors, particularly as information for trip planning becomes increasingly digital. Equally, for businesses to be able to compete effectively in today's technological world, broadband width and speed are both important factors.

- Work with Invest N.I. and Tourism N.I. to **develop an accommodation investment strategy/ portfolio for the entire District**. The shortcomings within the hotel sector have been highlighted in various studies. Equally, there is a further need for new and innovative camping options, such as different glamping structures, yurts and an increase in the number of sites for camper vans. The requirements for new facilities is likely to grow with the ongoing focus on outdoor recreation. The investment strategy should support Council's current efforts to work with investors, and the opportunities should be highlighted in appropriate channels.

Recommendation:

Develop a three-year action plan for outdoor adventure – land and water-based – that looks at the entire spectrum of opportunities within NMD, but with a particular focus on the Mournes-Gullion area and the Mourne Coast.

An action plan of this nature will assist in identifying gaps and priorities. It should complement the work of the Experience Development Plans and will identify the projects that will have particular visitor appeal versus projects that are of more local concern.

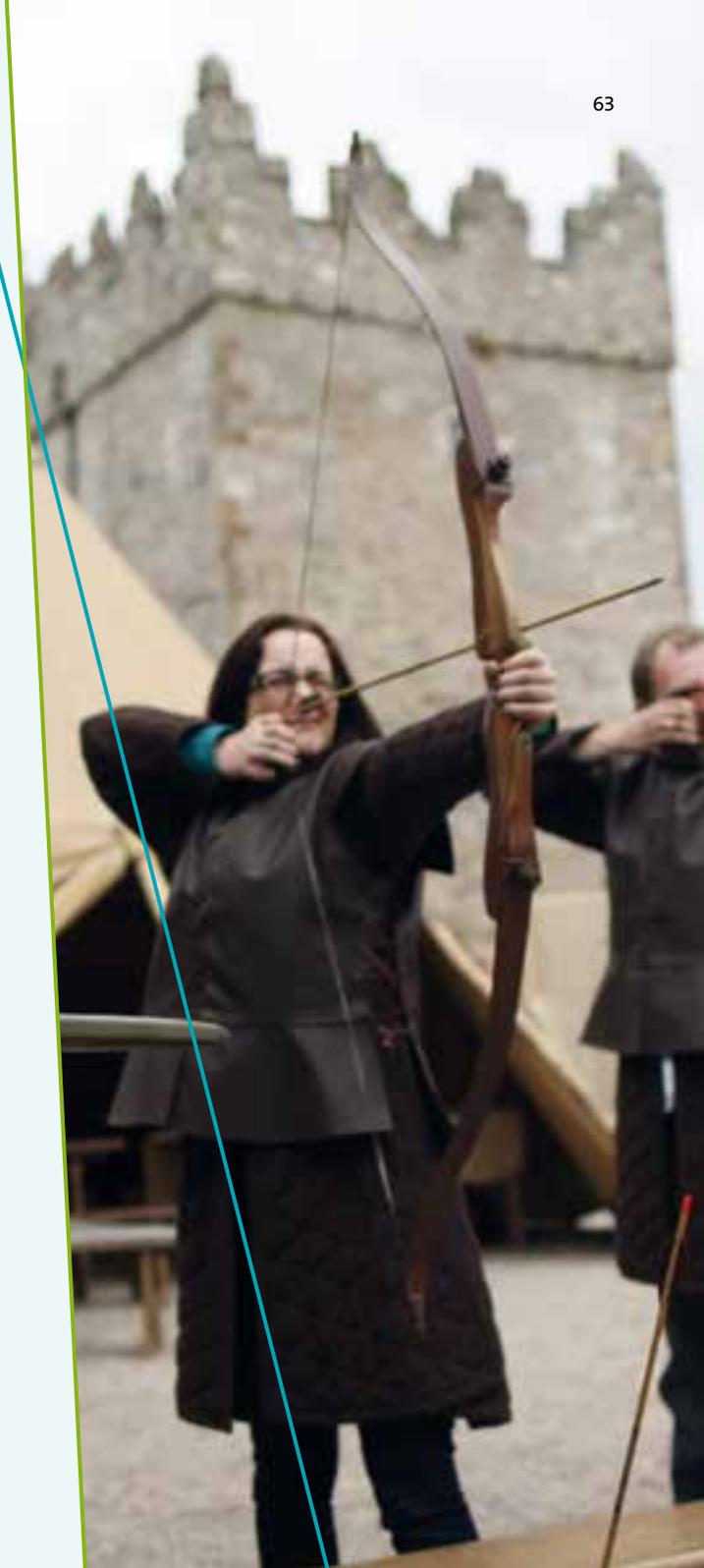
- Develop the **action plan** and in so doing:

Work with N.I. Forest Service to look at forest recreation within this broader context.

Identify key priorities for trails development across the region within this 3-year timeline, including the actionable items relating to the Great Eastern Greenway.

Assess opportunities for developing a stronger profile in marine and fresh water adventure activities as a means of generating visitor demand. This should also include gaps, such as camping requirements for the coastal canoe trail, and services needed to support the Blueway, assuming further work is undertaken on the Newry Ship Canal.

- Consider developing a **geocache programme** for NMD that supports story-telling and highlights unique cultural and natural heritage sites around the District. A 'reward programme' (e.g. for stamps collected in a 'passport') that is based on offering incentives to stay longer or spend more will benefit local businesses. A programme of this nature, if developed creatively, can assist in dispersing visitors.
- Extend the Ring of Gullion **signage/wayfinding audit** to the Mourne Mountains and the coastal area, including Downpatrick. Address signage issues that are identified.



A joined-up approach in relation to all aspects of destination management

One area of outdoor recreation that requires particular focus relates to the overall cycling experience. Cycling has the capacity to strengthen both the Mourne-Gullion destination experience and the Mourne Coast experience to a significant extent.

Given the growth of downhill mountain biking within the area and the general surge of interest in both leisure and competitive cycling within NMD, this is a sector that needs to be singled out for specific action.

Recommendation:

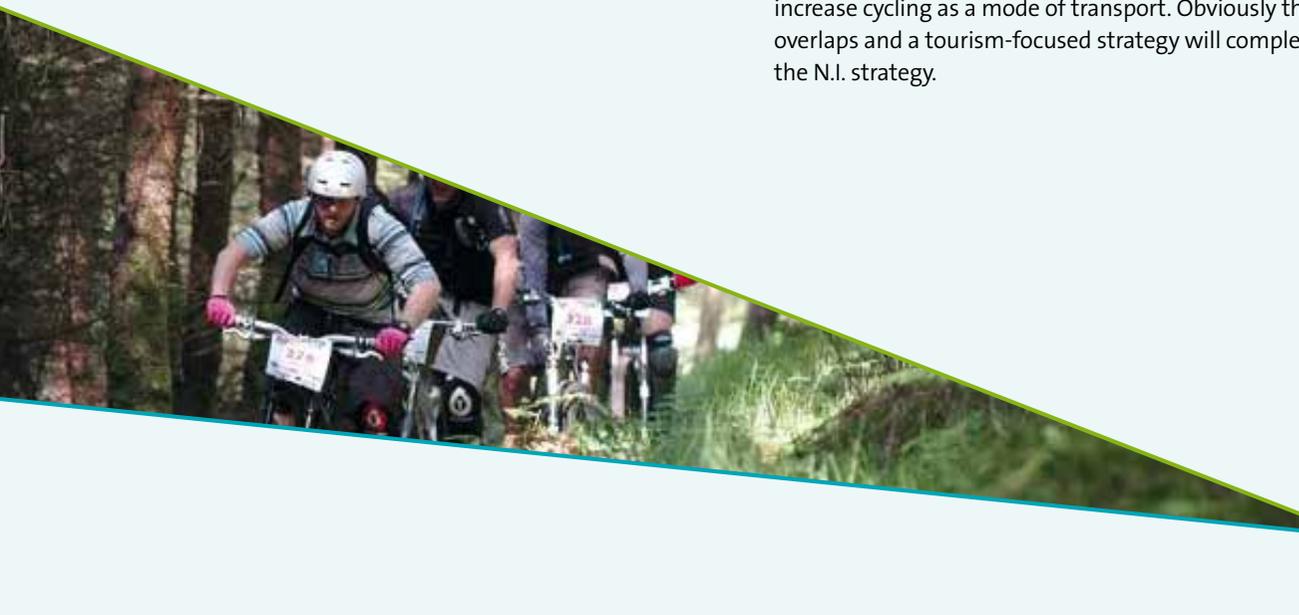
As part of the outdoor recreation action plan, review the entire spectrum of cycling and biking opportunities and develop a series of actions that will generate strategic growth of cycling and biking as a tourism sector, while increasing NMD's appeal as a cycling destination for all cycling and biking markets.

Actions:

A tourism cycling strategy focuses on how to use cycling and biking as a demand generator for tourism. It has a different perspective to N.I.'s Changing Gear bicycle strategy which looks at the community needs and actions that would increase cycling as a mode of transport. Obviously there are overlaps and a tourism-focused strategy will complement the N.I. strategy.

A cycling and biking strategy should be based on the following activities:

- Map the location of current and potential cycling and biking routes, and identifying 'signature' or 'EPIC' rides (in addition to the mountain bike trails).
- Identify suitable databases such as trailforks.com or mapmyride.com. In both of these examples, the mapping and profiling of opportunities in NMD is limited.
- Explore how to leverage the link with Sustrans National Route 1 which can potentially link Belfast with the Ring of Gullion, with much of the journey on greenways, including the Newry Canal towpath. As further linkages into Co. Louth are made through progress on the Great Eastern Greenway, NMD's strategic location as a cycling destination becomes more prominent – particularly given the scenic beauty of the Mourne and the Ring of Gullion.



- Assess en-route signage and trail-head facilities and identify priority projects.
- Review the potential to designate ‘quiet roads’ where vehicular speed can be reduced (likely to be accomplished through working with Transport N.I.) – new signage can promote safe sharing of the road.
- Identify potential experiences that can be paired with cycling and explore ways of developing these experiences, including strengthening the existing Mourne Foods Cycle Trail.
- Research and create an awareness of visitor needs within this activity sector – accommodation requirements, bike storage, potential for guided tours, location of rental and repair services, and transportation options. Consideration should be given to developing a ‘bike friendly’ business scheme.
- Developing front counter staff knowledge on the spectrum of opportunities throughout NMD.

- Explore the opportunity to continue building the reputation of the area as a premier biking and cycling destination. A number of highly successful events have been held at Castlewellan and Rostrevor, but establishing a multi-day annual event that includes events for children, annual adult competitive events, opportunities to ‘demo’ new equipment, evening events etc. will begin to solidify the reputation. The cycling events that were launched in 2016 as part of the N.I. Festival of Cycling is a strategic move in that direction.

In British Columbia, two major events have become core to the status of mountain biking in Whistler and Squamish – Crankworx and Test of Metal. Similarly, events such as the Moab EPIC in Utah (part of the AXS Race Series – endurance events where participants choose a route with a topographic map) have helped define the nature of mountain biking in Moab. Elsewhere, new annual GrandFondo road races are developing – again in response to the growing interest in road racing. Events of this nature have the potential to be held in shoulder seasons and can bring in considerable expenditure to a local community.



A joined-up approach in relation to all aspects of destination management

2. Leadership and collaboration

Developing a 'joined-up' approach to leadership and collaboration is of paramount importance to the growth of tourism and the successful implementation of this strategy. Without a change in how business is done, NMD is unlikely to see much difference to its current dependence on the highly seasonal domestic market with its relatively low-yield returns. Attracting new markets and establishing stand-out in the market place through the develop of EPIC experiences will require visionary leadership and strong collaboration.

The following recommendations represent the nature of change required. They represent a team approach with everyone pulling in the same direction. They involve new structures, new and strengthened working relations between partners, and a new approach to overseeing tourism within Council. These recommendations will require commitment and passion to realise the vision and goals that have been established in this Strategy.

Recommendation:

Establish a new structure and model to oversee and manage tourism based on:

1.

A new NMDDC inter-departmental tourism working group to work alongside a stronger and more focused team of officers within Enterprise, Regeneration & Tourism.

2.

A reorganised internal structure within Enterprise, Regeneration & Tourism to oversee all aspects of experience development, destination management, visitor services and the marketing of NMD destinations – in partnership with key external agencies.

3.

An industry advisory group based on a public-private participation model.

Actions:

Each of these structures has distinct roles. Working together to implement this strategy will create synergies and momentum that will facilitate progress. The approach is designed to build on existing expertise and to spread the benefits of current good practice.



1.

A new NMDDC inter-departmental tourism working group to work alongside a stronger and more focused team of officers within Enterprise, Regeneration & Tourism.

This group is designed to facilitate the cross-government approach to developing tourism that has been stressed throughout this strategy.

- Identify the critical touch points that other departments have with tourism and the staff most able to influence decision making in relation to potential tourism interests.

Meet every two months to review all NMDDC policies and activities that are likely to impact tourism – e.g. a public art programme.

Develop a deeper cross-government understanding of tourism and the impact of Council policies and programmes on competitiveness. Use the dialogue to identify ways of implementing the strategy through regular Council activities.

2.

A reorganised internal structure within Enterprise, Regeneration & Tourism to oversee all aspects of experience development, destination management, visitor services and the marketing of NMD destinations – in partnership with key external agencies.

A cohesive approach to the delivery of services relating to all aspects of tourism and to the implementation of this Strategy is essential if tourism growth is to be achieved.

Under this recommendation, the Department of Enterprise, Regeneration & Tourism will undertake a restructuring to establish internal units responsible for experience development, destination management, visitor services and the marketing of NMD destinations.

These units in turn would work with a range of partners to deliver the required services on the ground using a combination of internal staff resources and external service agreements to ensure the effective management, development and marketing of NMD destination experiences.

- Develop an NMDDC Tourism Division Action Plan that outlines the roles of the Division in facilitating tourism growth and overseeing the implementation of the Strategy. Restructure staff responsibilities accordingly and ensure that internal capacity to provide leadership is adequate.
- Develop a delivery model that will facilitate a unified and coordinated approach to the management of tourism assets within the Mourne and Ring of Gullion Destination, particularly in light of the joint area seeking Global Geopark designation.

This is likely to involve a strong partnership agreement with the Mourne Heritage Trust given their experience in recreation resource management, the provision of ranger services, and their ability to work collaboratively with a range of partners.

- Consideration should be given to ultimately proposing a wider geographic mandate for this delivery model – one that encompasses both the Mourne-Gullion area and the coastline. Many of the destination management functions are similar – trails development and maintenance, and establishing partnerships with land-owners and agencies to improve recreational access.
- Oversee the development of the Experience Development Plans and work with partners to develop experiences and strengthen industry capacity to deliver experiences. Again, this may involve out-sourcing roles, such as training, to partners with the prerequisite skills and experience.

3.

An industry advisory group based on a public-private participation model.

Establish an advisory working group consisting of officer and elected official representatives together with a cross-section of industry ‘champions’, including other key stakeholders such as land owners and managers. This group should be regarded as the ‘voice of industry’ and will act as a liaison group for Council.

Develop Terms of Reference for group members. It is anticipated that NMDDC will assist with servicing the administrative needs of this advisory group.

A joined-up approach in relation to all aspects of destination management

Building a strong industry

Strengthening the competitiveness of NMD and its destination experiences will require developing a stronger programme of support for industry and facilitating a greater degree of networking.

Recommendation:

NMDDC will take the lead in building supportive services for the District's tourism industry and acting on behalf of it to build strong partnerships with national stakeholders and agencies.

Actions:

- Develop a programme of supportive services to include:

A business mentorship programme delivered primarily by webinar – to include topics such as on-line marketing and building unique experiences.

The development of an industry-facing website to act as a communications channel and an online resource.

Regular communications with industry to ensure that industry is well informed of relevant activities – the Thompson Okanagan Tourism Association in British Columbia offers a weekly news service to industry that has become highly valued and well followed: <http://news.totabc.org/>

A business start-up programme and advisory service to encourage new entrepreneurs.

Networking activities, including an annual tourism forum to review progress on implementation, discuss forthcoming activities relating to the Strategy and provide an opportunity to bring in experts and speakers on relevant topics.

Familiarisation trips for front line staff to increase awareness of existing product and experiences, and improve their ability to cross-market.

Services to assist business operators in building new packages.

Planning advice – it is recommended that NMDDC has a planning officer dedicated to tourism.

- Improve the wider community's understanding of the value and significance of tourism through working with the media to promote relevant news.

Undertake a survey every 3 to 6 months to gain insight on business confidence and produce a confidence index.

- Develop strong working relations with agencies such as the Warrenpoint Harbour Authority and N.I. Screen to grow niche sectors .
- Continue to promote the importance of sustainability practices and the Green Tourism programme.
- Work with Tourism N.I. and the Department for the Economy to assess skills training and related labour needs for the District.

A compelling market presence and position

The emphasis throughout this Strategy has been on developing outstanding products and experiences that will differentiate NMD from other destinations.

Success in creating this differentiation and delivering EPIC moments true to the underlying 'promise' will be the cornerstone of building a compelling market position – one that aligns with the 'headline' and the related themes.

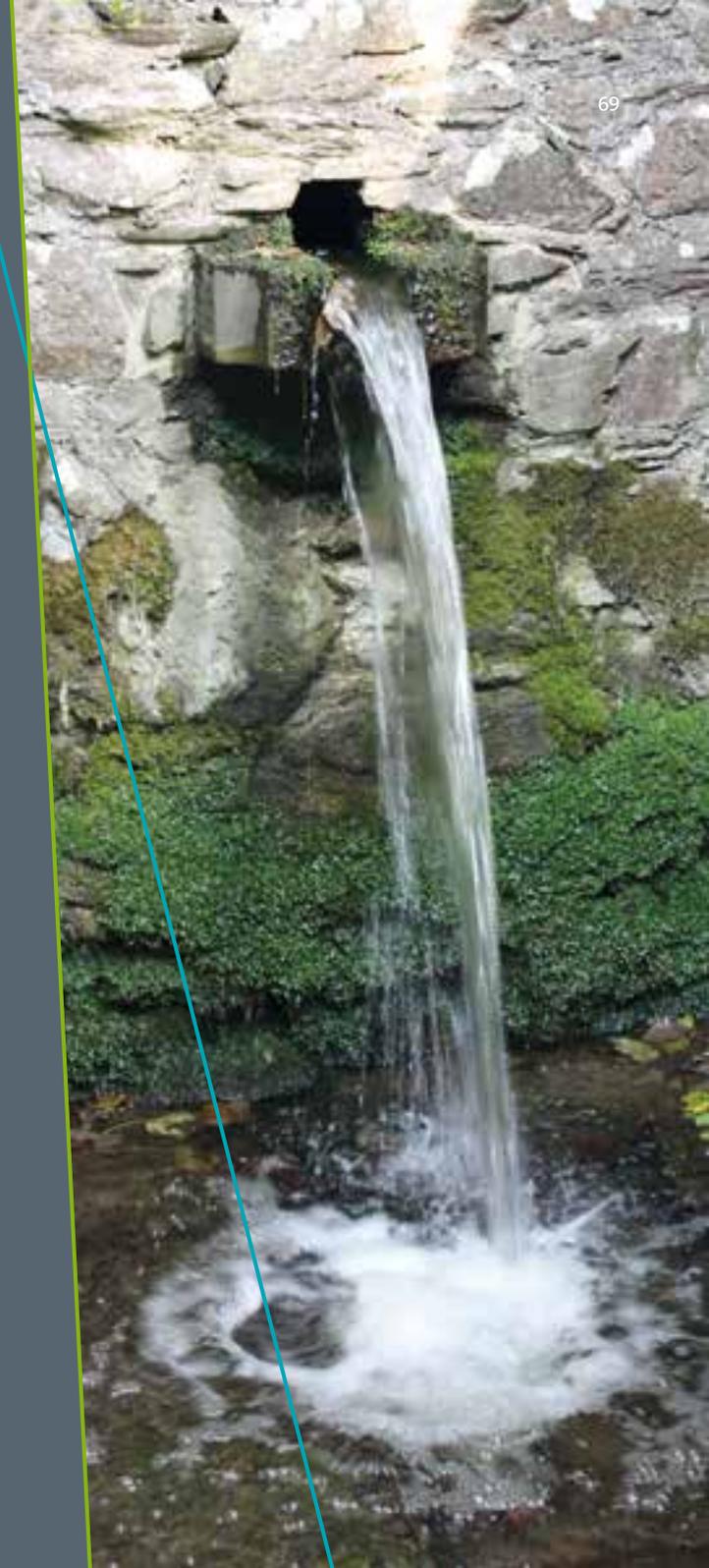
This emphasis has been designed to support and be supported by the direction that Northern Ireland as a whole is taking in developing a major umbrella proposition, with a series of experiential propositions around the country. This will ensure that NMD can be part of branding and marketing programmes of scale and quality that will have real impact on external target markets.

To attempt to market the District on its own would be costly and would only have a marginal impact on the external markets that have been identified in this strategy.

On the other hand, marketing as an integral part of N.I. and the island of Ireland can potentially have a much greater impact given the creative branding of scale that is being developed and implemented by both Tourism N.I. and Tourism Ireland, the growing appeal of the major propositions such as the Wild Atlantic Way, and the critical mass of the tourism experiences at this level.

For international, British and Republic of Ireland target market segments, it is anticipated that the new N.I. experience brand will provide the motivation for visitors to travel to the North, visiting NMD as part of an itinerary around N.I. or Ireland as a whole. The task for NMD is to support this experience brand through ensuring that the District has the compelling experiences to offer that will motivate visitors to stay. In this context the positioning of the District must be seen as a key part of the new N.I. proposition.

For domestic markets, the enhancement of the offer as proposed in this Strategy and its promotion through effective methods, with a strong focus on active and passive breaks and niche markets will contribute to the growth of tourism.



A compelling market presence and position

Recommendation:

The focus of marketing will be on supporting the promotion of compelling experiences and aligning with Tourism N.I.'s new and forthcoming creative branding.

Actions:

- Develop a consolidated and unified visitor-facing website for the destination experiences within NMD, that provides the platform for developing an integrated digital and social media strategy. The website should house a comprehensive and up-to-date events calendar.
- Align the delivery of NMD visitor information services with the N.I Visitor Information Strategy 2016-2020.
- Develop a content management strategy covering acquisition, management and distribution of content.
- Prepare an integrated marketing action plan.

Measuring success

Overall success will be measured against the umbrella goal of working collaboratively toward assisting N.I. achieve its targeted growth rate of 6% per annum in overnight expenditure. The statistics that are produced annually for Local Government Districts (see Appendix) will provide a gauge for progress.

More detailed performance measures will be included in the NMDDC Tourism Division Action Plan and will relate to Council's role in implementation.

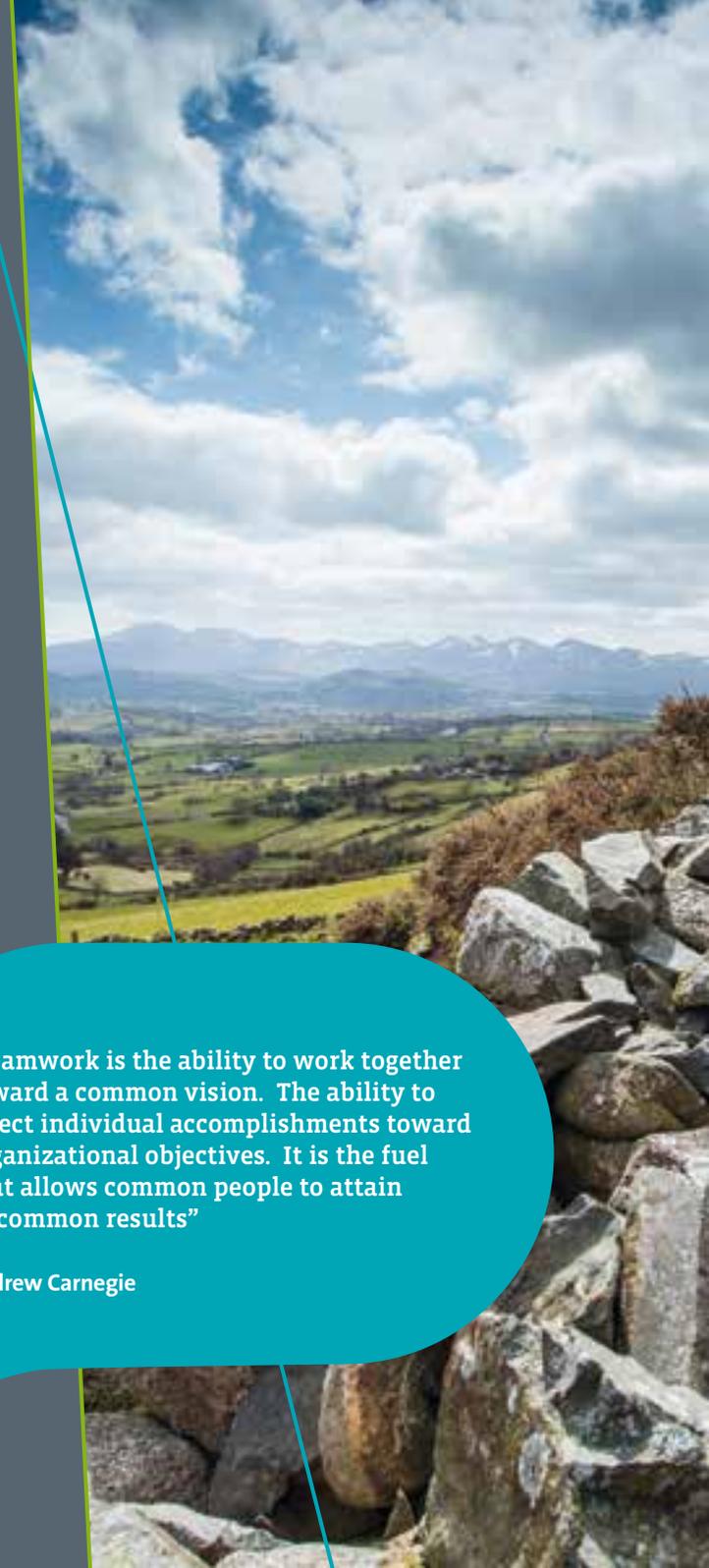
It is anticipated that NMDDC will produce an annual report on the overall implementation of the Tourism Strategy.

"It is a rough road that leads to the heights of greatness"

Lucius Annaeus Seneca

"Teamwork is the ability to work together toward a common vision. The ability to direct individual accomplishments toward organizational objectives. It is the fuel that allows common people to attain uncommon results"

Andrew Carnegie



8. Summary Action Plan – Recommendations

A Focus On Destination Experiences – The Mournes & Ring Of Gullion

UNESCO Global Geopark designation:	Prepare a revised application for Global Geopark status to be submitted to the UK National Commission for UNESCO and establish a new management infrastructure to allow for fully coordinated and cohesive management.
Newcastle signature access attraction to the higher Mournes:	Continue to move forward with the development of an iconic and innovative visitor access attraction that strengthens the overall destination experience of both the coastal route and the mountain. (Also relevant to the MOURNE COASTAL EXPERIENCE).
Lift assisted access for mountain biking:	Continue to review critical gaps and opportunities to further develop mountain biking in NMD, including the feasibility of developing lift-serviced access facilities and expanding training facilities at Rostrevor. (Also relevant to the MOURNE COASTAL EXPERIENCE).
The Newry Canal ‘Blueway’ opportunity	Develop a memorandum of understanding between NMDDC and ABCBC to move forward with the restoration of the Newry Ship Canal as a ‘Blueway’ navigable by canoes and small boats, and support the local IWAI chapter in undertaking the project.
Connecting with the Great Eastern Greenway:	Continue to work on developing the concept of the Great Eastern Greenway through building connectivity between the Newry Canal Towpath and the Omeara to Carlingford Trail.

A Focus On Destination Experiences – The Mourne Coast

Improved access to water:	Undertake an inventory of access to the coastline and associated current and potential activities. Identify strategies to improve access to water where clear tourism benefits can be anticipated.
Focus on coastal flavours:	Raise the profile of coastal flavours through working closely with the food and drink sector and related businesses to develop authentic Mourne coastal flavours experiences.

Gateway and Hub Communities

	<ul style="list-style-type: none"> • Orienting the visitor and servicing their information needs; • Providing a 'destination experience' in their own right through attractions, activities, evening entertainment, retail and related theming; • Servicing hospitality needs – restaurants, cafes, pubs and accommodations.
Downpatrick	Continue to work on attracting investment for the hotel sector; develop a 'joined-up' St. Patrick experience; strengthen the evening economy and visitor orientation; raise the profile of other activities such as horse-racing.
Newcastle	Develop new visitor attractions and facilities, including the signature access attraction ; become a dedicated information and trip planning base for mountains and coast alike; become a hub for social and informational events about the outdoors; develop short-timed activities.
Newry	Continue to implement the Newry City Centre Masterplan, given its focus on restoration; open up of the Newry Ship Canal to small boats and canoes/kayaks; link the Newry Canal Towpath with the greenway to Carlingford; improve the navigability and traffic flow of the area.
Warrenpoint/Rostrevor	Pursue the growth of the 'pocket ship' cruise industry; develop marine-based activities in Carlingford Lough; develop facilities that will complement the Great Eastern Greenway project, including the Narrow Water Bridge; implement the recommendations in the Kilbroney Park and Rostrevor Forest Masterplan.
Crossmaglen & Area	Continue to build experiences that highlight the local arts, culture and heritage; explore health and wellness as an emerging opportunity; raise the profile of the area in the domestic market.

Critical Success Factors

A focus on creating 'EPIC' destination experiences and story-telling

Prepare a revised application for Global Geopark status to be submitted to the UK National Commission for UNESCO and establish a new management infrastructure to allow for fully coordinated and cohesive management.

A joined-up approach in relation to all aspects of destination management

1. Product development and infrastructure

- Review supporting infrastructural requirements for tourism in NMD and prepare or promote appropriate mechanisms to respond to these requirements.
- Develop a three-year action plan for outdoor adventure – land and water-based – that looks at the entire spectrum of opportunities within NMD, but with a particular focus on the Mourne Gullion area and the Mourne Coast.
- As part of the outdoor recreation action plan, review the entire spectrum of cycling and biking opportunities and develop a series of actions that will generate strategic growth of cycling and biking as a tourism sector while increasing NMD's appeal as a cycling destination for all cycling and biking markets.

2. Leadership and collaboration

Establish a new structure and model to oversee and manage tourism based on:

- a) A new NMDDC inter-departmental tourism working group to work alongside a stronger and more focused team of officers within Enterprise, Regeneration & Tourism.
- b) A reorganised internal structure within Enterprise, Regeneration & Tourism to oversee all aspects of experience development, destination management, visitor services and the marketing of NMD destinations – in partnership with key external agencies.
- c) An industry advisory group based on a public-private participation model.

NMDDC will take the lead in building supportive services for the District's tourism industry and acting on behalf of it to build strong partnerships with national stakeholders and agencies

A compelling market presence and position

The focus of marketing will be on supporting the promotion of compelling experiences and aligning with Tourism N.I.'s new and forthcoming creative branding.

Endnotes

1. The tourist economy in Northern Ireland - <https://www.nibusinessinfo.co.uk/content/tourist-economy-northern-ireland>
2. Over two fifths (43%) hotels reported increased visitor numbers compared with the same period last year according to the June 2016 Tourism Industry Barometer – a survey of tourism businesses designed to provide insight into tourism performance, carried out by Millward Brown Ulster.
3. The Background Report (April 2016) prepared by TEAM and NMD's Tourism Position Paper (2016) both provide comprehensive summaries of this context, and the range of departments, agencies and organisations that have the potential to strengthen the development of tourism.
4. KPMG et al, 2013, Assessment of the Existing and Potential Tourism Development Opportunities Available from Northern Ireland Forests. A new vision for forest related tourism has been established to use the forest estate to deliver an exceptional visitor and short break experience for all which will increase the economic impact of forest related tourism in Northern Ireland.
5. NITB, 2013, Northern Ireland Home of Great Events: Events Strategic Vision to 2020
6. November 2015, Northern Ireland Assembly Briefing Paper on Northern Ireland Tourism: Sectors
7. The Background Report to this strategy maps the linkages between the actions in the Economic Regeneration & Investment Strategy 2015-2020 and a range of tourism-related elements such as positioning, product and experience development, and capacity building.
9. <https://www.theguardian.com/money/2014/aug/08/lets-move-to-newcastle-county-down>
10. AECOM, 2015, Mourne Coastal Route – Draft Tourism Masterplan: Newcastle Cluster, and 2013, Southeast Coast Masterplan.

Appendix

Tourism performance in NMD District 2015

Lgd	Number of trips	% of NI trips	Total spend	% of NI spend	Av. Length of stay (2014 data)	Av. spend/night (2014 data)	2013-15 % domestic visitors	Hotel rooms + other rooms	Av. hotel room occ.
Antrim & Newtownabbey	204,290	4%	£34.2m	4%	3.6	£51	42%	631+1,788	61%
Ards & North Down	376,755	8%	£51m	7%	3.5	£28	52%	299+568	54%
Abc	149,449	3%	£22.5m	3%	3.3	£37	43%	208+266	55%
Belfast	1,361,193	29%	£278m	37%	3.2	£67	30%	3,386+2,711	77%
Ccg	911,388	20%	£136.8m	18%	3.6	£49	66%	723+4,221	59%
Derry & Strabane	223,172	5%	£42.5	6%	3.5	£49	38%	659+1,051	59%
Fermanagh & Omagh	341,051	7%	£54.6m	7%	2.8	£60	66%	415+1,360	59%
Lisburn & Castlereagh	130,924	3%	£24.9m	3%	4.0	£48	21%	255+224	52% (2014)
Mid & East Antrim	382,224	8%	£45.6m	6%	3.6	£47	52%	479+463	64%
Mid Ulster	155,708	3%	£22.3m	3%	2.9	£43	51%	238+271	48%
Newry, Mourne & Down	404,442	9%	£47.7m	6%	2.6	£36	66%	529+1,294	55%

Ag freastal ar an Dún agus Ard Mhacha Theas
Serving Down and South Armagh

0300 013 2233 (Council)
0300 200 7830 (Planning)
council@nmandd.org
www.newrymournedown.org

Oifig an Iúir
Newry Office
O'Hagan House
Monaghan Row
Newry BT35 8DJ

Oifig Dhún Pádraig
Downpatrick Office
Downshire Civic Centre
Downshire Estate, Ardglass Road
Downpatrick BT30 6GQ

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