



Connected

## **A Community Plan**

for Armagh City Banbridge & Craigavon Borough  
2017-2030

# Delivering Our Community Plan

Tourism Economy Resource Pack



CONTENTS PAGE

1. PREPARING OUR COMMUNITY PLAN .....3

2. DELIVERING OUR COMMUNITY PLAN.....10

3. MEASURING OUR PROGRESS.....13

4. VISION, OUTCOMES AND INDICATORS .....16

5. TOURISM INDICATOR BASELINE .....20

6. DRAFT ACTION PLAN .....32

7. DRAFT TERMS OF REFERENCE .....35

8. USEFUL DOCUMENTS AND LINKS .....39

# **1. PREPARING OUR COMMUNITY PLAN**

## PURPOSE

This document provides background information on:

- What is Community Planning?
- The Story so Far
- *Connected: A Community Plan for Armagh City, Banbridge and Craigavon Borough*
- How we will deliver 'Connected'

We hope you will find this resource pack useful as we progress onto delivery of the community plan through action planning. This is a live document which will develop and evolve throughout action planning and engagement activities.

## INTRODUCTION TO COMMUNITY PLANNING

Community Planning is *“a process led by councils in conjunction with partners and communities to develop and implement a shared vision for their area, a long term vision which relates to all aspects of community life and which also involves working together to plan and deliver better services which make a real difference to people’s lives.”* Community Foundation Programme, Department of Environment

## What does the legislation say?

The 2014 Local Government Act requires Councils to initiate and having done so, maintain, facilitate and participate in community planning for its district. Specifically, with regard to community involvement, the Legislation states;

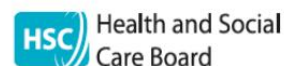
1. A Council and its community planning partners must seek the participation of and encourage the persons mentioned in subsection
2. to express their views, and take those views into account, in connection with –
  - a) community planning
  - b) the production of a community plan for the district; and
  - c) the review of community plans.
3. The persons are –
  - a) persons resident in the district;
  - b) persons who are not resident in the district but who receive services provided by the council or one of its community planning partners;
  - c) representatives of relevant voluntary bodies;
  - d) representatives of persons carrying on businesses in the district;
  - e) other persons who, in the opinion of the council, are interested in the improvement of the district’s social, economic or environmental well-being.

## What does this mean?

Community planning focuses on promoting positive outcomes for everyone within the Armagh City, Banbridge and Craigavon Borough. It is about giving local people an opportunity to have their say on issues that matter to them and their communities. It is an exciting time for us and by working together we can explore new, innovative and creative ways to deliver public services that will make a positive impact and bring about real change to help improve quality of life for all.

## Who's Involved?

Community Planning Partners are named in legislation and are required to participate in all stages of the process and to assist councils in carrying out their community planning duties. The Community Planning Partners' logos are listed below.



Keeping People Safe



Northern Ireland  
Fire & Rescue Service



Whilst councils and Community Planning Partners have specific duties in legislation, we recognise that for community planning to be successful, a wide range of people and organisations will be involved.

## DEVELOPING OUR COMMUNITY PLAN

The first community plan for the Armagh City, Banbridge and Craigavon Borough was developed with statutory partners, community and voluntary sectors, businesses, local people and central government through an inclusive and participatory process.

The community plan was progressed through six task and finish thematic working groups, one for each of the themes identified. The overall objective of the thematic working groups process was to support the development of the plan for each theme and gain consensus on a baseline data report.

Parallel to the thematic working group process, partners and council undertook extensive engagement with wider stakeholders enabling us to identify the priorities for our borough. The plan was published in March 2017 following a formal public consultation.

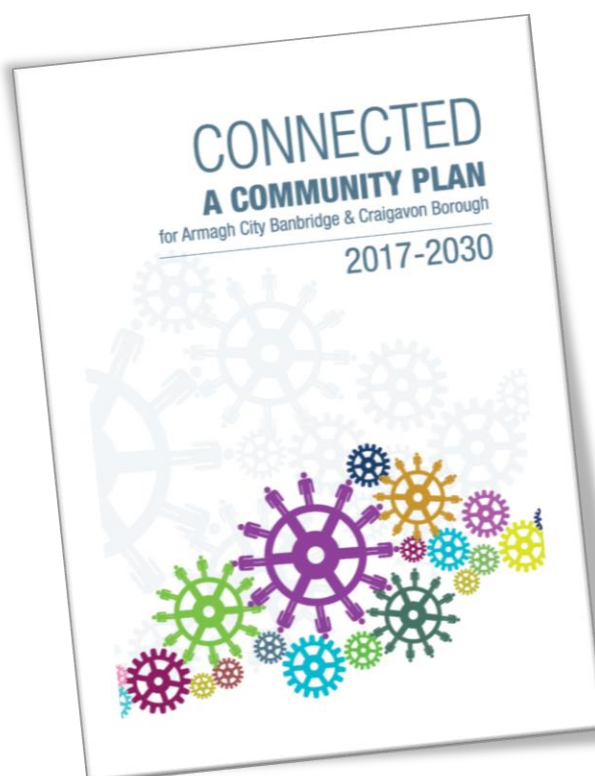
'Connected' aims to address the big issues affecting our borough and recognises that many of these will take joined up effort and time to change. In order to manage this process, we have adopted an Outcomes Based Approach which starts with the end results and works back to what needs to be done to achieve them.

**Outcomes** – the conditions of wellbeing we want for our children, families and the community as a whole

**Indicators** – a measure which helps to demonstrate how well we are progressing towards an outcome.

## CONNECTED: A COMMUNITY PLAN 2017-2030

*Connected: A Community Plan for the Armagh City, Banbridge and Craigavon Borough 2017-2030* is the overarching strategic plan. It contains a long term vision and aspirations for the borough whilst providing a framework for other strategies and plans and for the development and delivery of public services. To achieve our vision, it is vital for us to begin the work now.



Our 2030 vision is the future aspiration that we want to realise for our borough:

*“We have a happy, healthy and connected **community**, a vibrant and sustainable **economy** and appealing **places** for living, working and learning.”*

To help us achieve our shared vision we have agreed nine long-term outcomes arranged under the strategic themes of **Community**, **Economy** and **Place**. The outcomes do not operate in isolation and the achievement of one outcome will impact on the success of the others.

In addition, three cross-cutting themes run throughout the plan: **connectivity**, **equality** and **sustainability**. These cross-cutting themes are at the heart of everything we do and will be integrated into our action plans.

## Plan on a Page



## Summary Table

### Cross Cutting Themes



CONNECTIVITY



EQUALITY



SUSTAINABILITY

## Community

### Long-term Outcome

### Indicator

<b>Confident Community</b>	Everyone has opportunities to engage in community life and shape decisions – we have a strong sense of community belonging and take pride in our area	Percentage of people who feel they have an influence on local decisions in neighbourhood
		Percentage of people who feel a sense of belonging to their neighbourhood
<b>Healthy Community</b>	People are making positive lifestyle choices. They are more resilient and better equipped to cope with life's challenges	Preventable mortality (age standardised preventable mortality rate)
		Gap in life expectancy between most deprived areas and the borough overall
		Percentage of people who participate in sport or physical activity on at least one day a week
<b>Welcoming Community</b>	Our borough is a safe, respectful and peaceful environment free from the fear of crime	Percentage of people reporting that fear of crime has a minimal impact on their quality of life
		Percentage of people who see town centres as safe and welcoming places for people of all walks of life.
		Number of accidental dwelling fires

## Economy

### Long-term Outcome

### Indicator

<b>Enterprising Economy</b>	Our borough is a centre of excellence for entrepreneurship, innovation and investment	Number of VAT and/or PAYE registered businesses
		Business birth rates
		Survival rate of newly born businesses
<b>Skilled Economy</b>	We have a sustainable and vibrant economy with informed, flexible and skilled people	The proportion of the workforce in employment qualified to level 1 and above, level 2 and above, level 3 and above, and level 4 and above
		Employment rate (age 16-64)
<b>Tourism Economy</b>	Our borough is the destination of choice for international visitors	Number of overnight trips made by visitors from outside Northern Ireland

## Place

### Long-term Outcome

### Indicator

<b>Creative Place</b>	Our borough is an inspirational and creative place offering quality, inclusive arts and cultural experiences	Percentage of people (aged 16+) engaging with arts/cultural activities in the past year
<b>Enhanced Place</b>	Our rich and varied built heritage and natural assets are protected, enhanced and expanded for future generations to enjoy	Number of buildings at risk saved
		Number of high quality parks/green spaces (those holding Green Flag Award® status)
<b>Revitalised Place</b>	Our distinctive and vibrant urban and rural areas are at the heart of community and economic life	City and town centre vacancy rates
		Level of social housing need

## **2. DELIVERING OUR COMMUNITY PLAN**

## WORKING TOGETHER

The agreed governance structure for community planning is two-tiered as shown in diagram below and will be established to ensure people of Armagh City, Banbridge and Craigavon Borough enjoy better outcomes.

To achieve optimum impact, it will be necessary to keep our governance structures under review to allow them to evolve as necessary. Flexibility in all aspects of the structure will ensure that it is fit for purpose.

While Armagh City, Banbridge and Craigavon Borough facilitated the development of ‘Connected’, it is not a council plan. All Community Planning partners are responsible for its development, implementation and review.



## Community Planning Strategic Partnership

This is the overarching strategic partnership for community planning within the borough. The partnership will initially be made up of four Elected Members and Chief Executives/Senior Directors of the thirteen Statutory Partners named in the Community Planning Partners Order (Northern Ireland) 2016. The CPSP will be governed by a terms of reference, with scope for the partnership to invite additional Support Partners from the private, public and voluntary sectors as their input is required at a strategic level.

The Community Planning Strategic Partnership (CPSP) will encourage collaboration to grow and allow decisions to be made collectively. The key roles of the CPSP are to provide strategic direction and commitment and to the implementation and monitoring of *'Connected' A Community Plan for Armagh City, Banbridge and Craigavon* on behalf of the organisations they represent.

## Thematic Action Planning Teams

Thematic Action Planning Teams will be established to develop action plans on a thematic basis, aligning with the long-term outcomes set out in the community plan. Action plans will be for a two-year period, and will aim to contribute to the shared outcomes in the plan through increased collaborative actions. The teams will support the delivery and implementation of the community plan and carry out engagement activities.

Each Thematic Action Planning Team is led initially by a Statutory Partner and the relevant Head of Department from Council and will report to the CPSP.

The main roles and responsibilities of the Chair and Council Lead will include:

- Chairing and convening meetings
- Ensuring each action is attributed to an owner
- Ensuring the development and delivery of the Thematic Action Plans within the agreed timeframe
- Agreeing and reviewing performance management
- Ensuring that the group reports on progress at designated intervals

## Thematic Action Planning Process

Each team will be required to develop, implement and monitor thematic action plans to ensure they are contributing to their relevant outcomes. Commonality and consistency across the teams should be maintained where possible but each team will have unique requirements.

The action plans are not necessarily about attracting additional resources, but identifying links where partners can work better together to use existing resources better to deliver real and meaningful change.

The action plans will be 'living documents' meaning that specific actions can be added or removed throughout their timespan to reflect emerging needs and what the evidence tells us about their effectiveness.

The action planning process will take a phased approach. The teams will work through a series of workshops.

### **3. MEASURING OUR PROGRESS**

## MONITORING AND EVALUATION

We are using an outcomes based approach for community planning - we will incorporate and use evidence in the planning, delivery and reporting stages. This evidence will feed into the two-year report of progress and review of action plans and subsequently the four-year review of the community plan.

There are two levels of monitoring:

At an overall borough level progress on the community plan will be monitored by population indicators which have been identified and documented for each theme in the community plan. These will measure progress towards achieving the nine long term outcomes and will be collated by the community planning team in council.

At a lower level, progress will also be monitored for each programme or project in the action plans. As part of the action planning, Thematic Action Planning Teams will agree a range of information that will feed into and inform the review. TAP Team members will collect:

- Performance measures for each action (how much, how well and is anyone better off?)
- Achievements – e.g. significant milestones or strategic projects
- Stories - case studies documenting personal/community impact

## Performance Measures

For each project or programme in the action plans performance measures will be identified and agreed with TAP Teams. These will need to be in place at start so that data can be collected during project delivery by those on the ground delivering the programmes/projects. The measures will cover quantity (outputs), quality and impact. These will take the form of a short report card template included below. These report cards can be developed for both revenue and capital projects. The data will be collected on a regular basis and reported through the Thematic Action Planning Team to allow progress to be monitored.

## Performance Measurement Template

Action:

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Delivery Partner(s):

---

Who are the customers of this programme or project?

---

Date/time period:

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<p><u>How much did we do? (Quantity of effort)</u></p> <ul style="list-style-type: none"> <li>• <i>Number of customers served</i></li> <li>• <i>Number of activities</i></li> </ul>	<p><u>How well did we do it? (Quality of effort)</u></p> <ul style="list-style-type: none"> <li>• <i>Percentage of participants completing the training</i></li> <li>• <i>Percentage reporting being treated well throughout their engagement with project</i></li> </ul>
<p><u>Is anyone better off? (Quantity and quality of effect - impact)</u></p> <ul style="list-style-type: none"> <li>• <i>Number and percentage of participants showing improved results</i></li> <li>• <i>Number and percentage of participants reporting that the project helped them</i></li> </ul>	

## **4. VISION, OUTCOMES AND INDICATORS**

# ECONOMY

*“We are an internationally renowned destination – our competitive industries, productivity and outward facing economy provides the global platform to attract, develop and maintain talent, investment and high growth opportunities.”*



## Tourism Economy

This group will focus on the Tourism Economy Outcome from the Community Plan. Over the pages you will find information relevant to this TAP team including:

- Relevant outcomes, indicators from the community plan
- Indicator Baselines
- Draft Action Plan
- Terms of Reference for Tourism Economy Thematic Action Planning (TAP) Team

## TOURISM ECONOMY

### LONG-TERM OUTCOME

Our borough is the destination of choice for international\* visitors.

### SHORT-TERM OUTCOMES

- Stakeholders are more knowledgeable about current and future skills needs and are working in partnership to improve career pathways and equip people for employment.
- Individuals, particularly young people, have a better understanding of existing and future employment and enterprise opportunities, how to access them and the skills required

### INDICATORS

- Number of overnight trips made by visitors from outside Northern Ireland<sup>15</sup>

It is our aspiration that we capitalise on the borough's unique assets and events to become internationally renowned as a destination within Northern Ireland and the island of Ireland. In particular our culture and built heritage, our links to St Patrick, our quality food offering and events are strengths which we want to capitalise on to attract visitors to our beautiful borough.

In 2013 there were 4,200 employee jobs in tourism characteristic industries in the borough and, with visitor spend in the borough reaching approximately £22 million in 2015, tourism is a key contributor to the local economy. However, only 3% of overnight trips in NI are spent here. Therefore, an exciting opportunity exists to grow this sector further.

Between 2013 and 2015, 77% of people visiting the borough came from within Northern Ireland and Great Britain. Therefore, our focus for growth should be within international markets.

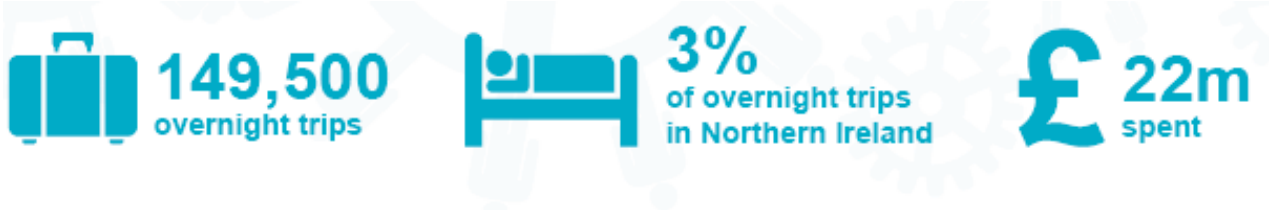
There is an increasing demand for more targeted and customised holidays, signalling a more differentiated approach to tourism marketing. Changing values are also generating demand for more environmentally conscious and nature oriented holidays.

We need to maximise the opportunities which our events and assets offer to encourage a greater number of overnight stays, increased visitor spend and repeat visits. As such, our identity and offering as a tourist destination needs to be further developed to provide high quality, memorable and unique visitor experiences.

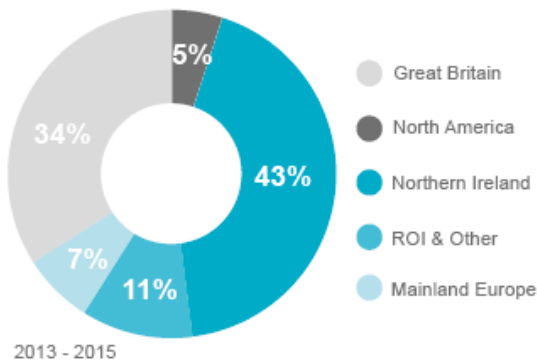
Central to achieving this is a well-defined tourism offering, which we, as residents, value and are proud to share with others. We should take time to appreciate our beautiful landscapes, historic places and architecture, rich biodiversity and our unique cultures, celebrations and way of life. We have knowledge, memories and stories to share.

KEY STATISTICS

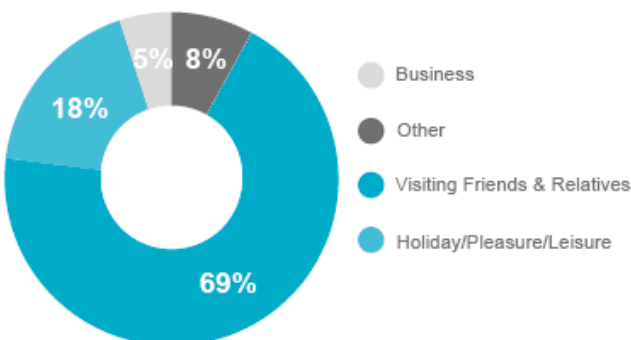
Overnight trips to Armagh City, Banbridge and Craigavon (2015)



Place of Origin



Reason for Visit



Tourism Statistics, NISRA

HOW WE MIGHT ACHIEVE THIS:

A working group of key partners will be tasked with developing an action plan for the delivery of outcomes. Below are a few examples of potential actions which may be taken forward:

- Improved visitor insight, data capture and knowledge
- • Development and delivery of a tourism strategy for the borough
- • An audit of existing facilities to gauge investment needs
- Improved and consistent marketing of the borough's tourism proposition

## **5. TOURISM INDICATOR BASELINE**

## Tourism Economy

**Long-term outcome:** Our borough is the destination of choice for international<sup>1</sup> visitors.

One indicator is being used to monitor progress towards the tourism economy long-term outcome for the borough:

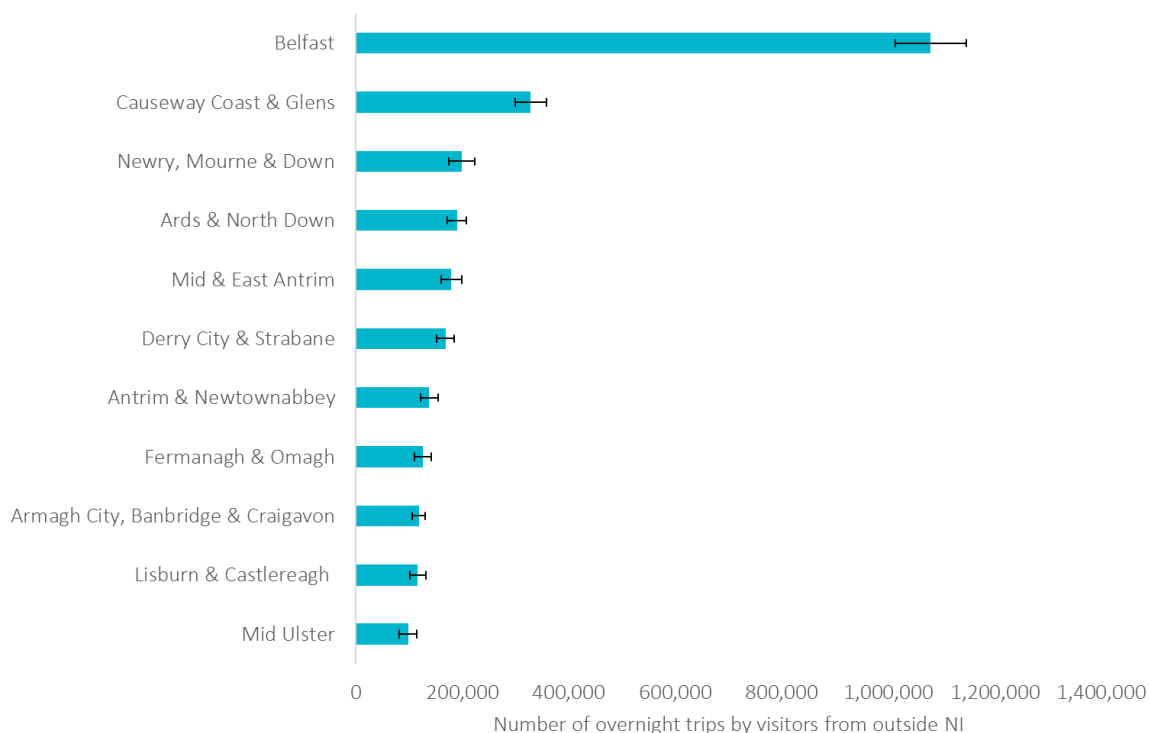
- Number of overnight trips made by visitors from outside Northern Ireland

Data source: [Tourism Statistics, Northern Ireland Statistics and Research Agency](#).

This indicator feeds into and is linked to the draft Programme for Government (as of October 2016) indicator of total spend by external visitors.

**Indicator:** Number of overnight trips made by visitors from outside Northern Ireland.

In 2016 there was an estimated 118,200 overnight trips made by visitors from outside Northern Ireland to the borough, or 4% of all external visitor to Northern Ireland. Associated with these trips to the borough were an estimated 684,100 nights and £24m expenditure.



*Figure 1. Estimated overnight trips made by visitors from outside Northern Ireland, 2016. Source: Tourism Statistics, NISRA. Note – The estimates on visitor numbers are derived from sample surveys, confidence intervals around the estimates are shown. See ‘notes on indicator data’ section below.*

<sup>1</sup> Outside Northern Ireland

Local Government District	Overnight Trips		Nights		Expenditure	
	Number	% of NI	Number	% of NI	£	% of NI
Antrim & Newtownabbey	137,693	5%	567,019	5%	29,680,232	5%
Ards & North Down	189,844	7%	953,377	8%	36,995,646	6%
Armagh City, Banbridge & Craigavon	118,221	4%	684,053	6%	24,194,240	4%
Belfast	1,079,727	39%	3,925,762	35%	279,286,841	46%
Causeway Coast & Glens	328,676	12%	1,434,517	13%	73,038,971	12%
Derry City & Strabane	168,428	6%	735,404	6%	36,505,253	6%
Fermanagh & Omagh	125,684	5%	521,522	5%	25,061,925	4%
Lisburn & Castlereagh	116,481	4%	504,535	4%	23,237,855	4%
Mid East Antrim	179,330	7%	737,090	6%	34,434,155	6%
Mid Ulster	98,139	4%	509,416	4%	20,058,391	3%
Newry, Mourne & Down	198,627	7%	792,928	7%	31,059,446	5%
<b>All LGDs*</b>	<b>2,740,850</b>	<b>100%</b>	<b>11,365,623</b>	<b>100%</b>	<b>613,552,954</b>	<b>100%</b>

Table 1. Estimated overnight trips, nights and expenditure made by visitors from outside Northern Ireland, 2016. Source: Tourism Statistics, NISRA. Note – the estimates are derived from sample surveys, see ‘notes on indicator data’ section below. \* The All LGDs figure (2.7 million) is higher than the Northern Ireland total (2.6 million) as someone may spend time in various locations during the one overnight trip to NI.

The number of overnight trips by external visitors to the borough has varied over the last six years. At a Northern Ireland level, there has been a statistically significant increase in the number of overnight trips from 2.3 million in 2015 to 2.6 million in 2016. The longer term trend suggests there has been a steady increase in the number of external overnight trips to Northern Ireland from 2011.

	Overnight Trips		Nights		Expenditure	
	Number	Percentage of NI	Number	Percentage of NI	£	Percentage of NI
2011	110,437	5%	521,401	5%	18,886,235	4%
2012	87,991	4%	395,821	4%	13,258,393	3%
2013	108,945	5%	626,395	6%	19,044,714	4%
2014	120,327	5%	601,568	6%	22,434,299	4%
2015	104,819	4%	516,959	5%	19,074,714	4%
2016	118,221	4%	684,053	6%	24,194,240	4%

Table 2. Estimated overnight trips, nights and expenditure in Armagh City, Banbridge and Craigavon Borough made by visitors from outside Northern Ireland, 2011-2016. Source: Tourism Statistics, NISRA. Note – the estimates are derived from sample surveys, see ‘notes on indicator data’ section below.

### Notes on indicator data

To determine the total number of external visitors, data is compiled by NISRA from 3 surveys:

1. The Northern Ireland Passenger Survey (NIPS). This is a survey of passengers at air and sea ports in Northern Ireland conducted by NISRA. It is used to determine the number of visitors using these ports who have had overnight stays in Northern Ireland.
2. The Survey of Overseas Travellers (SOT). This is a survey of passengers at air and sea ports in the Republic of Ireland and is conducted on behalf of Fáilte Ireland. It is used to determine the number of visitors using these ports who have had overnight stays in Northern Ireland.
3. The Household Travel Survey (HTS). This survey is carried out by Central Statistics Office (CSO) to gather information on Republic of Ireland residents who overnight in Northern Ireland.

The sample surveys capture information from a subset of the population in order to estimate the headline statistics of overnight trips as well as other informative statistics of the whole population. The results from sample surveys are always estimates and not precise figures. This means that they are subject to margins of error which can have an impact on how the estimates should be interpreted, especially regarding comparisons over the short term or where differences between estimates are small.

Information supplied from SOT and HTS does not contain breakdowns by Local Government District (LGD). NISRA currently uses the Northern Ireland Passenger Survey to apportion the Survey of Overseas Travellers by LGD. Similarly, it uses the Continuous Household Survey to apportion the Household Travel Survey. Therefore the estimates (and associated confidence intervals) are subject to a number of assumptions so should be treated with additional caution.

As the confidence intervals are quite wide for most of the LGD figures, many short term changes would not be seen as statistically significant. Estimates should not be compared over short periods of time, but rather be looked at over longer periods. These estimates should also be considered alongside other indicators, where available, to give a fuller picture of tourism with each LGD.

Information on confidence intervals is not available prior to 2016 as the methodology was only created for 2016 estimates. However, they will be available for future years.

Local Government District	External Overnight Trips	95% confidence limit		95% confidence interval	
		Lower	Upper	Lower	Upper
Antrim & Newtownabbey	137,693	120,996	154,391	-12.1%	12.1%
Ards & North Down	189,844	171,456	208,232	-9.7%	9.7%
Armagh City, Banbridge & Craigavon	118,221	105,466	130,976	-10.8%	10.8%
Belfast	1,079,727	1,012,911	1,146,543	-6.2%	6.2%
Causeway Coast & Glens	328,676	298,828	358,524	-9.1%	9.1%
Derry City & Strabane	168,428	152,052	184,803	-9.7%	9.7%
Fermanagh & Omagh	125,684	110,040	141,329	-12.4%	12.4%
Lisburn & Castlereagh	116,481	101,641	131,321	-12.7%	12.7%
Mid & East Antrim	179,330	159,719	198,941	-10.9%	10.9%
Mid Ulster	98,139	81,642	114,635	-16.8%	16.8%

Newry, Mourne & Down	198,627	174,398	222,856	-12.2%	12.2%
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Table 3. External overnight trips by Local Government District, 2016 with upper and lower confidence limits. Source: Tourism Statistics, NISRA.



Figure 2. Number of overnight trips in Armagh City, Banbridge and Craigavon Borough made by visitors from outside Northern Ireland, 2011-2016. Source: Tourism Statistics, NISRA. Note – The estimates on visitor numbers are derived from sample surveys, the confidence interval around the 2016 estimate is shown. See ‘notes on indicator data’ section below.

Due to the nature of household surveys in Northern Ireland, users should be aware that statistics on Northern Ireland residents aged under 16 are excluded.

## Profile of External Visitors

### Origin of Visitors

During the three year period 2014-2016, 61% of external visitors to the borough were from Great Britain. This is similar to the profile of external visitors to Northern Ireland overall in 2016, where 54% of overnight trips were from Great Britain, followed by 18% from Republic of Ireland.

The survey estimates suggest that the top five places of origin for external visitors to Northern Ireland in 2016 were England, Republic of Ireland, Scotland, United States of America and Germany.

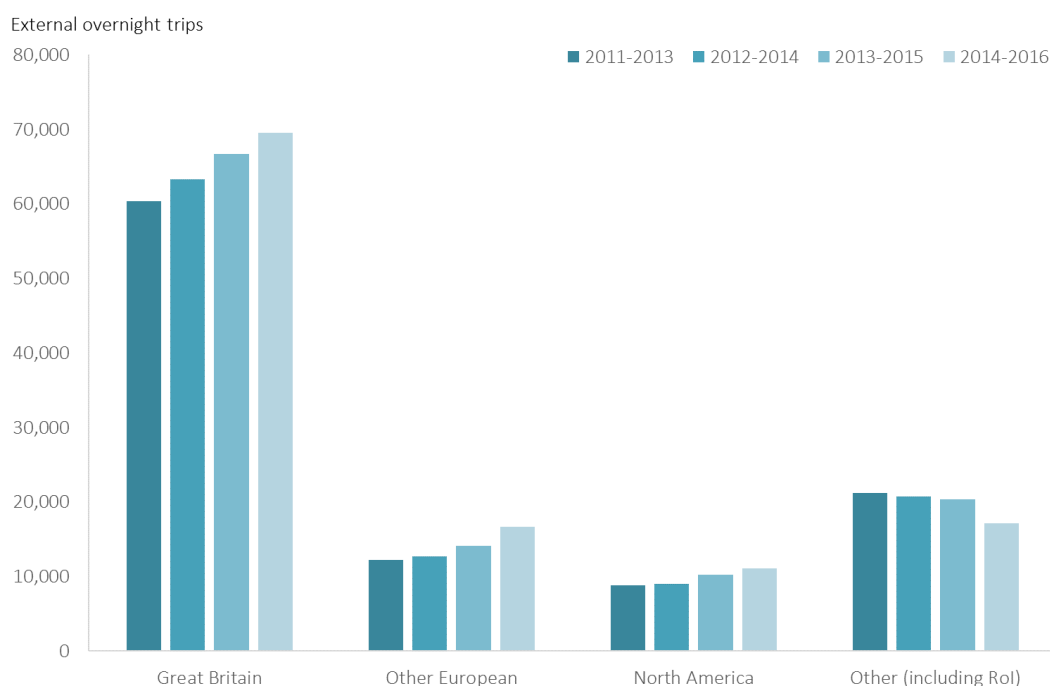


Figure 3. Estimated average overnight trips in Armagh City, Banbridge and Craigavon Borough by place of origin, 3-year average, 2011-2013 to 2014-2016. Source: Tourism Statistics, NISRA.

Overnight trips to Armagh City, Banbridge & Craigavon	Place of Origin				
	Great Britain	Other European	North America	Other (including Rol)	All
2011-2013	60,306	12,179	8,792	21,181	102,458
2012-2014	63,322	12,716	9,040	20,676	105,754
2013-2015	66,644	14,099	10,249	20,372	111,364
2014-2016	69,539	16,697	11,051	17,168	114,456
2014-2016 percentage	61%	15%	10%	15%	100%

Table 4. Estimated average overnight trips in Armagh City, Banbridge and Craigavon Borough by place of origin, 3-year average, 2011-2013 to 2014-2016. Source: Tourism Statistics, NISRA. Note- Estimates based on a sample size of 51-100 are shaded.

	2011	2012	2013	2014	2015	2016	% of 2016
<i>Great Britain</i>	1,052,227	1,034,439	1,165,002	1,174,608	1,295,419	1,389,411	54%
<i>Republic of Ireland</i>	370,310	452,716	396,359	389,757	336,383	455,972	18%
<i>Mainland Europe</i>	253,310	252,962	242,947	264,933	310,666	358,383	14%
<i>North America</i>	161,010	163,572	165,188	227,322	229,122	249,962	10%
<i>Other overseas</i>	94,769	102,746	119,774	121,899	129,813	134,821	5%
<b><i>Northern Ireland</i></b>	<b>1,931,626</b>	<b>2,006,436</b>	<b>2,089,271</b>	<b>2,178,520</b>	<b>2,301,402</b>	<b>2,588,548</b>	<b>100%</b>

Table 5. Number of external overnight trips to Northern Ireland by place of origin, 2011-2016. Source: Tourism Statistics, NISRA.

### Reason for Visit

Of all estimated overnight trips to Northern Ireland in 2016, half (50%) were to visit friends and relatives. A third (33%) came to NI for holiday / pleasure / leisure purposes. Some 13% came to NI for business purposes, and 4% for other reasons. These proportions have remained relatively unchanged between 2011 and 2016. Reason for visit is only available for all visitors at Local Government District level.

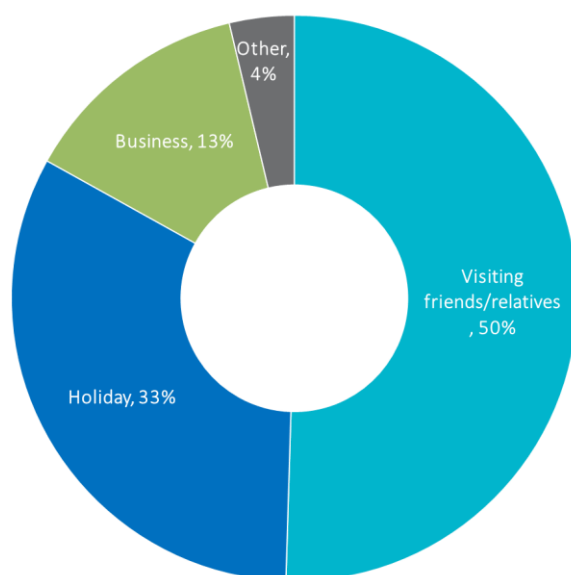


Figure 4. Reason for overnight trip, external overnight trips to Northern Ireland, 2016. Source: NISRA.

### Accommodation Type used for External Overnight Trips in Northern Ireland

Of all external overnight trips to NI during 2016, staying with friends and relatives was the most popular choice of accommodation type. The second most popular accommodation type used was hotels, with 24% of total nights being spent in a hotel.

	Hotel	Guesthouse and B&B	Caravan & Camping	Rented	Staying with friends / relatives	Other	Total
Great Britain	22%	4%	2%	5%	63%	5%	100%
Republic of Ireland	29%	5%	7%	9%	49%	2%	100%
Other Europe	21%	10%	4%	9%	35%	22%	100%
North America	36%	5%	0%	9%	39%	11%	100%
Other Overseas	20%	9%	0%	8%	51%	12%	100%
<b>Total External Visitors</b>	<b>24%</b>	<b>6%</b>	<b>2%</b>	<b>7%</b>	<b>52%</b>	<b>9%</b>	<b>100%</b>

Table 6. Proportion of nights of external overnight trips to Northern Ireland by place of origin and accommodation type 2016. Source: Tourism Statistics, NISRA.

### Accommodation

The supply of accommodation in the Borough is one of the lowest of the 11 council areas in NI. In 2016, there were 507 rooms available in the Borough, the second lowest in NI with 206 of these being in hotels, the lowest number in NI.

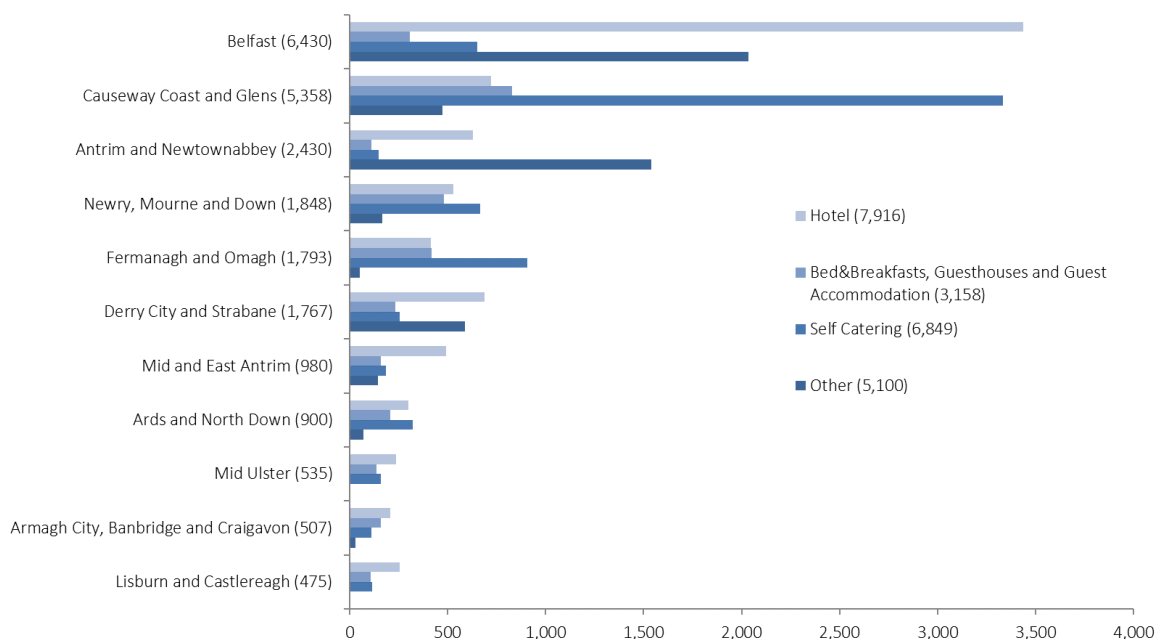


Figure 5. Number of rooms available in licensed accommodation by type and Local Government District, 2016. Source: Tourism Statistics, NISRA.

Whilst there are some excellent examples of high quality five star Guesthouse and Self-catering accommodation, overall the majority of rooms are in 3 star or ungraded accommodation.

	Hotels		Guest House, B&B and Guest Accommodation		Self-catering		Hostels	
	Number	Rooms	Number	Rooms	Number	Units	Number	Rooms
5 star	-	-	2	9	1	1	-	-
4 star	-	-	-	-	7	14	1	18
3 star	3	112	1	5	5	9	-	-
2 star	2	49	-	-	-	-	-	-
1 star	-	-	-	-	-	-	-	-
Ungraded	1	36	41	154	16	18	1	13
Awaiting grading	1	9	-	-	1	5	-	-
<b>Total</b>	<b>7</b>	<b>206</b>	<b>44</b>	<b>168</b>	<b>30</b>	<b>47</b>	<b>2</b>	<b>31</b>

Table 7. Visitor accommodation stock in Armagh City, Banbridge and Craigavon Borough as of 9<sup>th</sup> May 2017. Source: Tourism NI.

### Occupancy

Hotel room occupancy in the borough was 52% in 2016, compared to 70% for NI overall. Belfast had the highest room occupancy during 2016 (79%), followed by Mid & East Antrim (67%) and Derry City & Strabane (65%). There were an estimated 2.02 million rooms sold in Northern Ireland hotels during 2016. Estimates suggest 2016 saw the highest hotel occupancy rates of any year from 2011 onwards.

	% hotel room occupancy 2016
Antrim & Newtownabbey	64%
Ards & North Down	61%
Armagh City, Banbridge & Craigavon	52%
Belfast City	79%
Causeway Coast & Glens	64%
Derry City & Strabane	65%
Fermanagh & Omagh	63%
Lisburn & Castlereagh	*
Mid & East Antrim	67%
Mid Ulster	54%
Newry, Mourne & Down	62%
<b>Northern Ireland</b>	<b>70%</b>

Table 8. Hotel room occupancy by Local Government District, 2016. Source: NISRA. \* sample size too small to provide a reliable estimate.

### Visitor Attractions

During 2016, the top visitor attractions in Northern Ireland in terms of visitor numbers were the Giant's Causeway (0.94 million visits), Titanic Belfast (0.67 million), the Ulster Museum Belfast (0.46 million) and Carrick-a-Rede Rope Bridge (0.44 million).

Armagh City, Banbridge and Craigavon Borough has a wide variety of attractions. In 2016 the top five visitor attractions/parks in terms of visitor numbers were Lurgan Park (633,863), Oxford Island National Nature Reserve (224,940 visits), Kinnego Marina (205,293) Tannaghmore Gardens & Rare Breeds Animal Farm (123,806) and Lough Neagh Discovery Centre (122,029). These top attractions are all free to visit.

Visitor Attraction	2011	2012	2013	2014	2015	2016
Armagh County Museum	12,851	13,099	9,452	10,001	11,147	10,247
Armagh Observatory	42,006	42,491	11,000	40,151	44,805	44,251
Armagh Public Library	4,403	6,094	7,086	7,713	7,959	8,276
Armagh Roman Catholic Cathedral	9,000	9,000	—	—	60,000	60,000
Bronte Interpretive Centre	565	—	—	—	401	341
Brownlow House	—	—	—	—	15,000	18,000
Cardinal Tomas Ó Fiaich Memorial Library And Archive	—	—	10,972	—	5,280	12,467
Coney Island	—	—	2,006	2,000	2,000	4,000
Dan Winter's House	3,530	3,197	3,925	4,160	3,437	3,209
FE McWilliam Gallery/Studio (inc TIC)	43,069	50,466	—	—	42,498	41,405
Kinnego Marina	343,927	158,448	325,906	209,359	209,207	205,293
Lough Neagh Discovery Centre	93,105	—	133,004	131,559	133,437	122,029
Lurgan Park	750,000	487,859	770,156	784,292	—	633,863
Milford House Collection	900	1,200	1,500	1,200	2,000	798
Millenium Court Arts Centre	12,072	15,302	16,552	16,602	19,443	19,286
No 5 Vicars Hill	3,755	3,892	3,755	3,962	3,582	4,149
Oxford Island National Nature Reserve	319,079	296,606	314,020	217,353	220,928	224,940
Peatlands Park	95,000	100,000	90,000	95,000	126,123	102,436
Portmore Lough & Nature Reserve	4,560	4,500	12,000	12,000	12,000	13,253
Royal Irish Fusiliers Museum	10,218	10,847	11,269	12,630	11,286	12,254
Sloan's House Museum of Orange Heritage	—	—	—	—	—	5,533
St. Patricks Cathedral	35,190	35,822	36,270	68,939	—	87,285
Tannaghmore Gardens & Rare Breeds Animal Farm	85,000	—	30,686	109,207	124,876	123,806
The Navan Centre & Fort	45,000	45,200	50,803	49,362	44,016	45,192
Tommy Makem Arts & Community Centre	—	—	—	—	500	1,200
William McCrum Park - Home of the Penalty Kick	—	—	—	—	6,000	3,000

Table 9. Visitor attractions and their number of visitors in Armagh City, Banbridge and Craigavon Borough, 2011-2016.

Source: Tourism Statistics, NISRA. Note- the figures presented are for both fee paying and non-fee paying attractions and parks.

Visitor attractions across Northern Ireland provide information to NISRA on the number of people who visit their attractions throughout the year. Counting methods for individual attractions differ and may also change year on year which may impact on these results. The list of visitor attractions above only includes those that choose to participate in the NISRA report and make their results public.

### Visitor Experience

In order to understand our visitors better and to gain an insight into their needs, it is important to view the Northern Ireland visitor experience from the point of view of our visitors. Visitor attitude surveys on nine key tourism areas (known as Destinations) in Northern Ireland are available from Tourism NI, these can help gain an insight into the various elements of the visitor journey here - from trip planning to participating in leisure activities. Results for 2014 are available for two destinations in the Borough - Armagh and Lough Neagh and surrounding area. In the survey, visitors were asked to choose words to describe the destination.

Armagh, was seen as Friendly (66%), Memorable and Cultural (both 42%). Compared to all other regions, Lough Neagh was more likely to be seen as Relaxing (78%) and more likely than most other regions to be described as Fun (29%) and Familiar (21%).

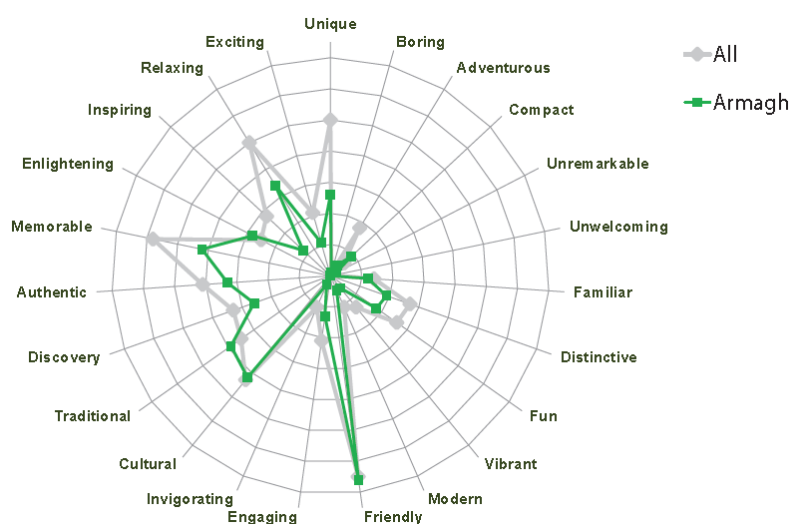


Figure 6. Armagh - words chosen to describe destination. Source: Visitor Attitude Survey, 2014, Tourism NI.

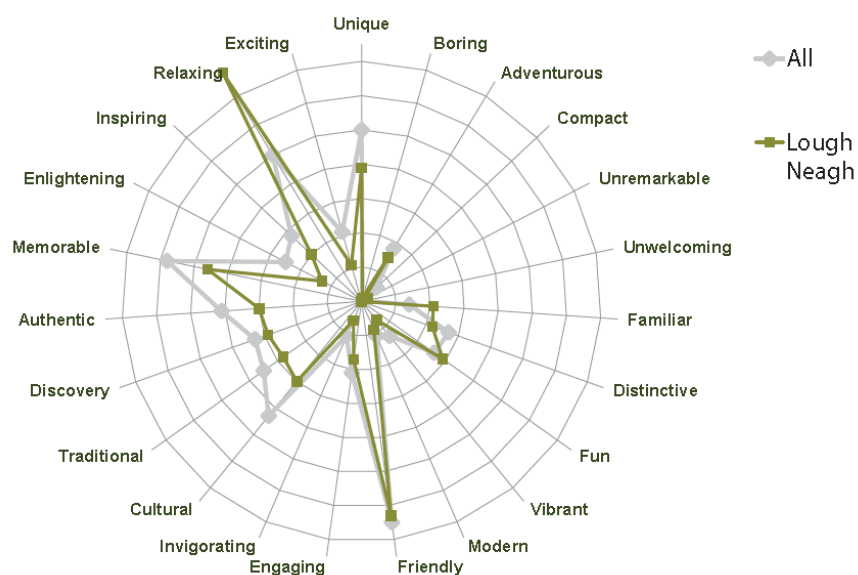


Figure 7. Lough Neagh - words chosen to describe destination. Source: Visitor Attitude Survey, 2014, Tourism NI.

Employment in Tourism Related Industry

Employee jobs in tourism characteristic industries relate to a number of different business areas, most notably hotels and restaurants. In 2015, there were 70,100 employee jobs in Armagh City, Banbridge and Craigavon Borough, of which 4,300 or 6% were in tourism characteristic industries (the lowest proportion of the 11 council areas). Belfast had the largest number of employee jobs in tourism characteristic industries, but proportionally local employment in the tourism industry is higher in Ards and North Down (13%) and Causeway Coast and Glens (12%) LGDs.

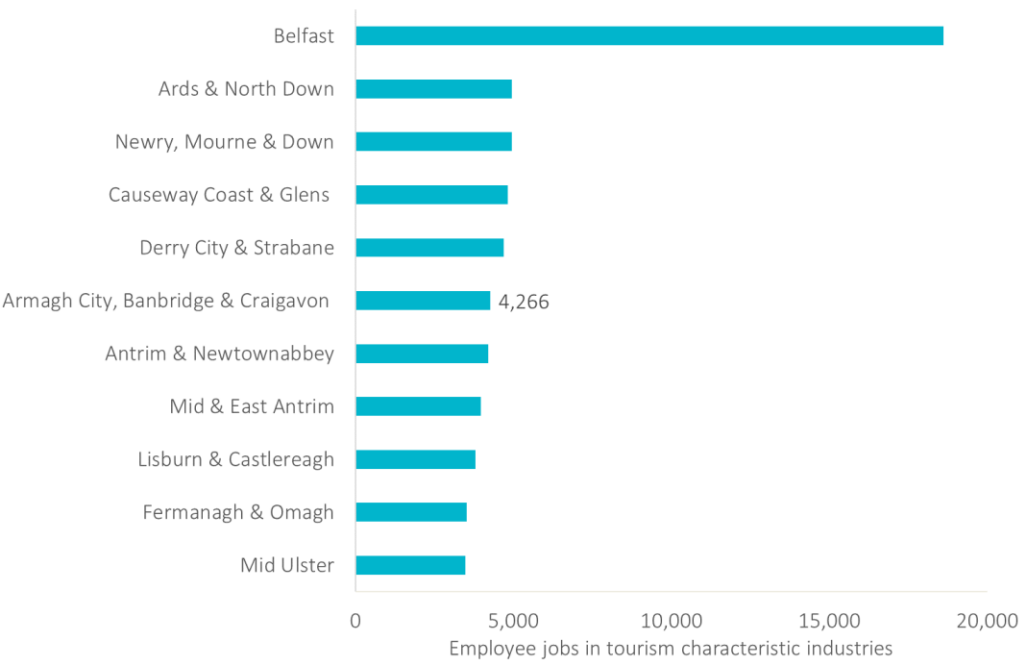


Figure 8. Employee jobs in tourism characteristic industries by Local Government District, 2015. Source: NISRA, Northern Ireland Local Government District Tourism Statistics 2016 and NI Census of Employment 2015.

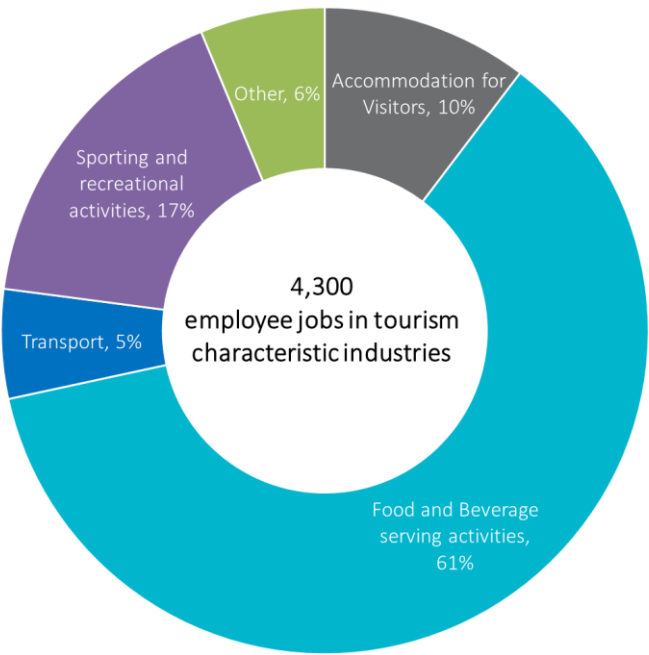


Figure 9. Employee jobs in tourism characteristic industries by type, Armagh City, Banbridge and Craigavon, 2015. Source: NISRA, Northern Ireland Local Government District Tourism Statistics 2016 and NI Census of Employment 2015.

## **6. DRAFT ACTION PLAN**

## Draft Tourism Economy Action Plan as at 17 April 2018

### THEMATIC ACTION PLANNING TEAM: TOURISM ECONOMY

**CHAIR:** Stephen Bill, Tourism NI    **COUNCIL LEAD:** Brian Johnston, Head of Tourism, Arts and Culture

#### Vision for Economy Strategic Theme

We are an internationally renowned destination – our competitive industries, productivity and outward facing economy provides the global platform to attract, develop and maintain talent, investment and high growth opportunities.

#### Tourism Economy long- term outcome

Our borough is the destination of choice for international\* visitors

#### Short term Outcomes

- We know and understand our visitors and have established a distinct identity and proposition which we are communicating to international markets
- We provide high quality, memorable and unique visitor experiences

#### Population Indicator

Number of overnight trips made by visitors from outside Northern Ireland

#### Links to Programme for Government Draft Outcomes

- We have created a place where people want to live and work, to visit and invest
- We prosper through a strong, competitive, regionally balanced economy
- We have more people working in better jobs

## Draft Tourism Economy Action Plan

Our Actions	What will we do?	Suggested Partners	Time Frame	Resources	Suggested Action Coordinator	Performance Measure/data collection
<b>1. Establish a baseline of tourism performance against which growth in the visitor economy can be measured</b>	Undertake primary and secondary research	Public sector partners Tourism Industry		Council officer time	Council Tourism Department	
<b>2. Embed new tourism brand for the Borough with trade partners</b>	Work with public sector and tourism industry partners to ensure that new tourism brand is utilised by them	Public sector partners Tourism Industry		Council officer time	Council Tourism Department	
<b>3. Increase overnight visitors to the Borough</b>	Identify opportunities for collaboration on sales campaigns	Public sector partners Tourism Industry		Council officer time Council, stakeholder financial resources	Tourism NI? Council Tourism Department	
<b>4. Embed signature events as key part of destination development</b>	Engage partners in the development plans for each signature event.	Public sector partners Tourism Industry		Council officer time	Council Tourism Department	
<b>5. Promote investment in new and existing tourism products</b>	Undertake technical appraisals and funding applications	Council and Tourism and Hospitality Trade Partners		Council officer time	Council Tourism Department/Variou?	

## **7. DRAFT TERMS OF REFERENCE**

## Draft Terms of Reference

### CONTEXT

*Connected: A Community Plan for the Armagh City, Banbridge and Craigavon Borough 2017-2030* is the overarching strategic plan. It contains a long term vision and aspirations for the borough whilst providing a framework for other strategies and plans. We have agreed nine long-term outcomes arranged under the strategic themes of Community, Economy and Place. A number of Thematic Action Planning (TAP) teams will be formed to develop, implement and monitor thematic action plans to ensure they are contributing to their relevant outcomes.

### Thematic Action Planning (TAP) Teams

The key role of the Thematic Action Planning Teams is to agree collaborative actions that contribute to realising the long-term outcomes in the community plan. The action plans will focus on actions/activities where partners can achieve more by working together.

A number of teams will be convened based on each of the long-term outcomes, and where a close strategic link has been identified between outcomes these will be progressed through a single action plan. Table one below outlines the proposed TAP teams.

Strategic Theme	Thematic Action Planning Team	Chair	Council Lead
Community	Healthy	Health Partners (TBC)	Mike Reardon
	Confident and Welcoming	Billy Stewart – PSNI	Seamus McCrory
Economy	Skilled and Enterprising	Ethna McNamee – Invest NI	Nicola Wilson
	Tourism Economy	Stephen Bill – Tourism NI	Brian Johnston
Place	Creative	TBC	Brian Johnston
	Revitalised and Enhanced	TBC	Therese Rafferty

### TAP Teams deliverables

A longer term goal for community planning is for joint planning and delivery of services for the borough. Action plans will be for a two-year period, and initially will aim to contribute to short-term outcomes in each thematic area through increased collaborative actions. The Skilled and Enterprising Economy TAP Team has identified that relationships between members will be essential to achieve our outcomes.

#### *There are four key deliverables for each team*

1. Develop clear, achievable and measurable shared action plans to cover a two-year period
2. Consult with stakeholders and promote involvement of Section 75 groups in this process
3. Implement performance management framework including review
4. Ensure cross-cutting themes of **equality, connectivity** and **sustainability** are integral to the action plans

### Membership

The teams will be operational and therefore membership will consist of statutory partners and other relevant partners from public, private and voluntary sector. Wider community engagement on the themes will happen in a parallel process. The Thematic Action Planning Team structure will be subject to review by the Community Planning Strategic Partnership.

## Roles and Responsibilities

Tourism NI is the statutory lead for this team and will be chaired by Stephen Bill, Tourism NI, each team will also have a dedicated Council Lead and will be supported by the Community Planning Team. All members are required to demonstrate commitment and be willing to contribute to collaborative working.

### *All team members*

Each team member will support the progression of the community plan by:

- Participating in action planning teams/working groups to deliver on the community plan
- Work with team members to identify actions, develop and agree action plans and ensure delivery against planned outcomes
- Taking a lead in actions when required
- Carrying out allocated tasks as agreed at meetings
- Contribute to effective community engagement in the development and implementation of action planning
- It will be the responsibility of each team member/organisation to engage with stakeholder groups within the borough. The participation and views of stakeholder in shaping action plans will ensure they are responsive and reflect local needs.
- To promote inclusivity teams will identify hard to reach groups and identify appropriate methods of engagement.
- Collecting data for performance management
- Develop relationships across the borough to foster collaborative working
- Each partner will be responsible for gaining the necessary approvals from their own organisation.

### *The Chair and the Council Lead – Stephen Bill, Tourism NI and Brian Johnston, Armagh City Banbridge and Craigavon Borough Council*

The chair and council lead will have additional roles to those outlined above these include:

- Chairing meetings
- Agreeing agendas
- Allocating/reviewing/co-ordinating work between meetings
- Ensuring each action is attributed to an owner
- Ensuring the development and delivery of the Thematic Action Plans within the agreed timeframe
- Ensuring that the group reports on progress at designated intervals
- Reporting back to partnership (Statutory Lead)
- Agreeing and reviewing performance management

### *Community Planning Team*

The community planning team will have additional roles to those outlined above these include:

- Driving community planning across all service areas in council
- Providing action planning process and advisory role to community planning partners
- Supporting an evidence informed approach through provision of baseline data, engagement tools and performance management framework
- Convening action planning meetings
- Administration
- Providing and advising on templates and screening
- Establishing and facilitating the process
- Ensuring consistency/co-ordination between working groups
- Sense checking
- Coordinating and publishing a performance review every 2 years
- Thematic Action Plan Resource Pack.

**Conflict of Interest**

This is an open and transparent process and documentation in relation to the TAP Team will be publicly available. Conflicts of interest may arise during the action planning process. It is the responsibility of team members to identify any potential conflict and to declare it to the Chairs. Any conflict of interest will be recorded in the minutes.

**Timeframe**

It is envisaged that the development of the action plans will require approximately four meetings over a 12-week period. The TAP teams will implement the action plans once they have been approved by the Community Planning Strategic.

**Reporting Arrangements**

TAP teams are accountable to the Community Planning Strategic Partnership (CPSP). Implementation will also be subject to approvals of the CPSP. A consistent and concise reporting template will be developed to support the gathering of information for each of the six action plans. The partnership will report to the Department for Communities every two years and progress will also be reported to stakeholders and the wider community.

**Decision Making**

All team members are required to demonstrate commitment and be willing to contribute to collaborative working. To enhance collaborative working decisions will be made by consensus as far as possible. Decisions taken should ensure team members can demonstrate the strong link between the action and the long-term outcome.

## **8. USEFUL DOCUMENTS AND LINKS**

## USEFUL DOCUMENTS

### General

Connected, A Community Plan for Armagh City, Banbridge and Craigavon Borough

<https://www.armaghbanbridgecraigavon.gov.uk/resident/community-planning/>

Developing Our Plan

<https://www.armaghbanbridgecraigavon.gov.uk/resident/developing-our-plan/>

Connected Equality Impact Assessment

<https://www.armaghbanbridgecraigavon.gov.uk/resident/community-planning/>

Draft Programme for Government October 2016

<https://www.northernireland.gov.uk/consultations/programme-government-consultation>

### Tourism Economy

Tourism, Arts and Culture Thematic Working Group Baseline Report July 2016

<https://www.armaghbanbridgecraigavon.gov.uk/download/129/tac-workshops/13679/tac-baseline-report.pdf>

Tourism Strategy 2017-2022

<https://www.armaghbanbridgecraigavon.gov.uk/download/45/corporate-publications/18149/tourism-strategy-2017-2022.pdf>

Department for Economy – Tourism

<https://www.economy-ni.gov.uk/topics/tourism>

## Statutory Partners

[Armagh City, Banbridge and Craigavon Borough Council](#)[Council for Catholic and Maintained Schools \(CCMS\)](#)[Education Authority \(EA\)](#)[Health and Social Care Board](#)[Invest NI](#)[Libraries NI](#)[Northern Ireland Fire and Rescue Service \(NIFRS\)](#)[Northern Ireland Housing Executive \(NIHE\)](#)[Police Service of Northern Ireland \(PSNI\)](#)[Public Health Agency \(PHA\)](#)[Southern Health and Social Care Trust](#)[Sport NI](#)[Tourism NI](#)

**Community Planning Team**

Armagh City, Banbridge and Craigavon Borough Council

Civic Building

Downshire Road

Banbridge

BT32 3JY

Tel: 028 40660644

Email: [communityplanning@armaghbanbridgecraigavon.gov.uk](mailto:communityplanning@armaghbanbridgecraigavon.gov.uk)

Website: [www.armaghbanbridgecraigavon.gov.uk/communityplanning](http://www.armaghbanbridgecraigavon.gov.uk/communityplanning)