



Lisburn & Castlereagh Tourism Strategy 2018-2022



Tourism & Transport Consult International
67 Ballycrochan Road
Bangor BT19 6NF
Northern Ireland
Tel: +44 2891274206
E-mail: henderson@tciinternational.com

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1. Introduction

1.1 Background

The Lisburn & Castlereagh tourism strategy provides a blueprint for developing tourism over the next five years and presents a long-term vision and growth path across the area.

Lisburn & Castlereagh is now seen as an up and coming tourism destination in Northern Ireland because of its close proximity to Belfast, successful and rapidly growing city and because of this a tourism strategy is needed to maximise growth opportunities and to provide a roadmap for tourism growth utilising current and developing strengths.

As well as the focus on shopping within the area new opportunities flow from Hillsborough Castle and Gardens, the Maze Long Kesh complex, Lagan Canal reinstatement and through city, urban and rural regeneration. Modern marketing and communications will have a key role in helping drive growth.

1.2 Terms of Reference

The outputs required from the Terms of Reference (TOR) for the assignment are as follows:

- ✓ Develop a vision that will grow the local tourism offer, maximising tourism opportunities that will increase bednights, trips and spend;
- ✓ Outline the growth potential within the industry setting the wider aspiration to grow the industry year on year;
- ✓ Audit & evaluate tourism activities throughout the area and highlight the potential opportunities that may be exploited;
- ✓ The strategy will attempt to proactively address and support the areas tourism needs;
- ✓ The tourism strategy should be closely aligned with key existing strategies, policy documents, action plans and draw out opportunities/Actions for the new council area;
- ✓ The tourism strategy should demonstrate clear links to driving the local economy forward.

The TOR further indicates some fifteen elements to be addressed throughout the process of developing the strategy and these are carefully taken into account in this document.

1.3 The Opportunity

With tourism value in Northern Ireland ready to double by 2020 and most likely expected to double again by 2030 there is a requirement for each council area to organise itself to maximise benefits locally from these opportunities and to present the area in the most attractive way to visitors from key markets including accessible day visit markets. This is coupled with a need for further investment which must be stimulated where necessary and encouraged by proactive interventions from the public sector to help stimulate the private sector.

The Lisburn Castlereagh area has many natural and man-made attractions which when added together and made more accessible and marketable can develop into a key tourism destination in its own right. This is the philosophy underpinning this strategy.

1.4 Layout of the Strategy

The broad approach taken is to look at the context in which tourism growth may take place and to examine the external strategies and approaches that will influence the way forward. The

product within the area is examined and critically assessed while identifying strengths, weaknesses, opportunities and threats.

A vision for the tourism growth of the area is developed and an analysis of those things influencing it. This in turn is followed by plans for development of product, marketing and communication, visitor services – while providing a detailed Action Plan for the next three years and a broader approach thereafter.

1.5 Thanks

Thanks are due to the members of the tourism industry who attended Workshops and offered advice on the way forward including valuable time in consultations. Thanks also are due to the Councillors and Officers of Lisburn City & Castlereagh Council for their input, commitment and valuable insights.

2. Lisburn Castlereagh Tourism in Context

2.1 Northern Ireland Tourism Data

Northern Ireland tourism statistics are prepared by the Northern Ireland Statistics and Research Agency (NISRA) for the Department for the Economy (DfE). The annual statistics for 2016 were published in May 2017 and the local authority districts data were published in July 2017. For this Strategy, therefore, 2016 full year data will be used and where appropriate part-year data from 2017.

The long-term trends in Northern Ireland are seen in Table: 2.1 below from NISRA:

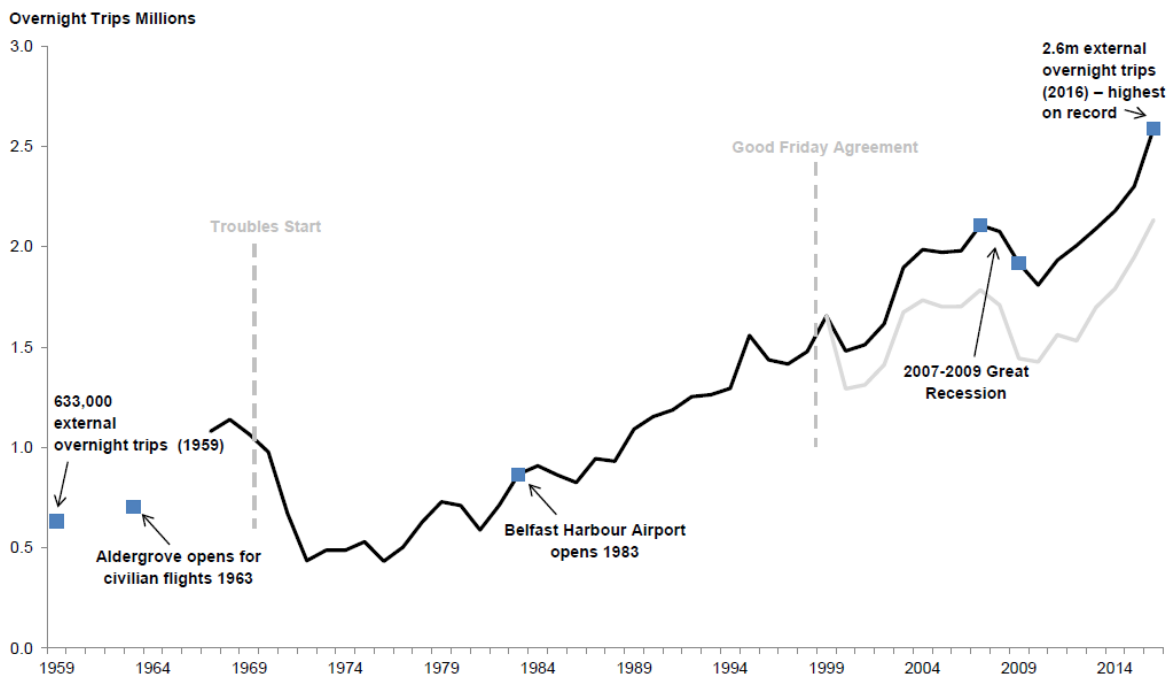


Table: 2.1 Long Term Incoming Tourists - Source NISRA/DfE

It is noted that 2016 saw the highest number of external overnight trips on record to Northern Ireland.

Hotel rooms sold in Northern Ireland in 2016 increased to 2.02m against 1.90m in 2015 indicating a successful year while in August hotel room occupancy increased to 88% - the highest ever recorded for that month.

While 2017 data is not yet available the monthly occupancy rates for that year indicate an increase in hotel occupancy for the first quarter but some falls from April to November.

Tourism Northern Ireland’s (TNI) Tourism Industry Barometer of September 2017 generally recorded a relatively strong tourism performance for the year to date.

In 2015 overall tourism trips to Northern Ireland had remained unchanged on 2014 although expenditure had increased by 1% and nights by 2%. In 2016 it appears from NISRA’s carefully worded guidance:

“Whilst there has been no statistically significant change in the estimated number of overnight trips and expenditure between 2015 and 2016; the sources point towards a general upward trend from 2011”

i.e. Tourism growth was statistically insignificant during 2016.

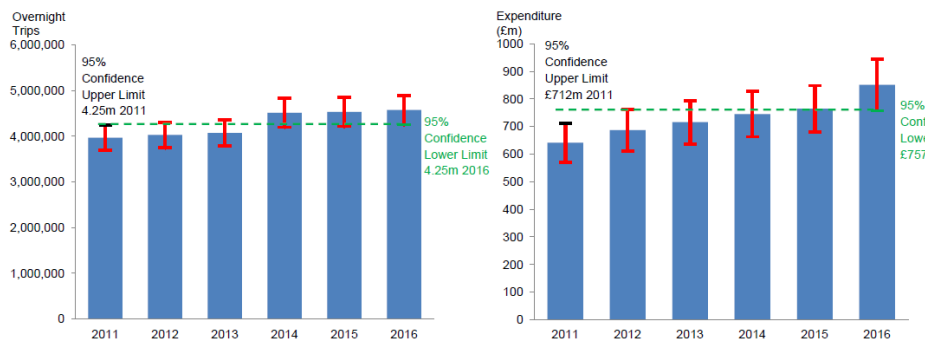


Table: 2.2 Trips & Expenditure 2011-2016 with Confidence Limits – Source: NISRA/DfE

The source of overnight stays/markets in Northern Ireland in 2016 is seen in the chart below:

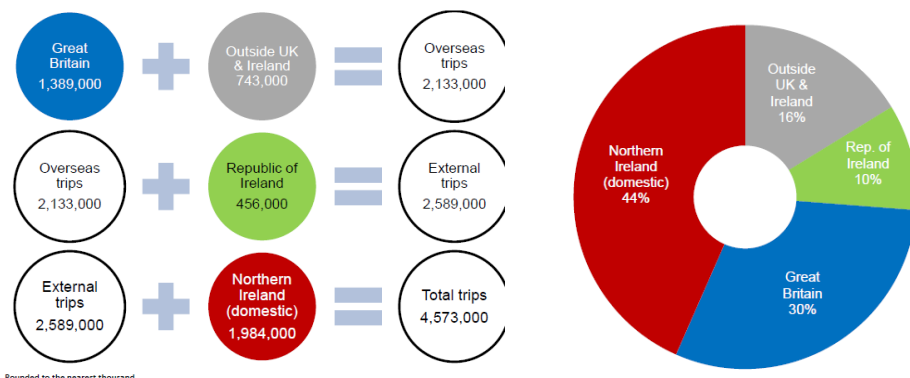


Table: 2.3 Overnight Trips 2016

Table: 2.4 Place of Origin 2016 Source: NISRA/DfE

The purpose of visit of all trips is seen in the table below:

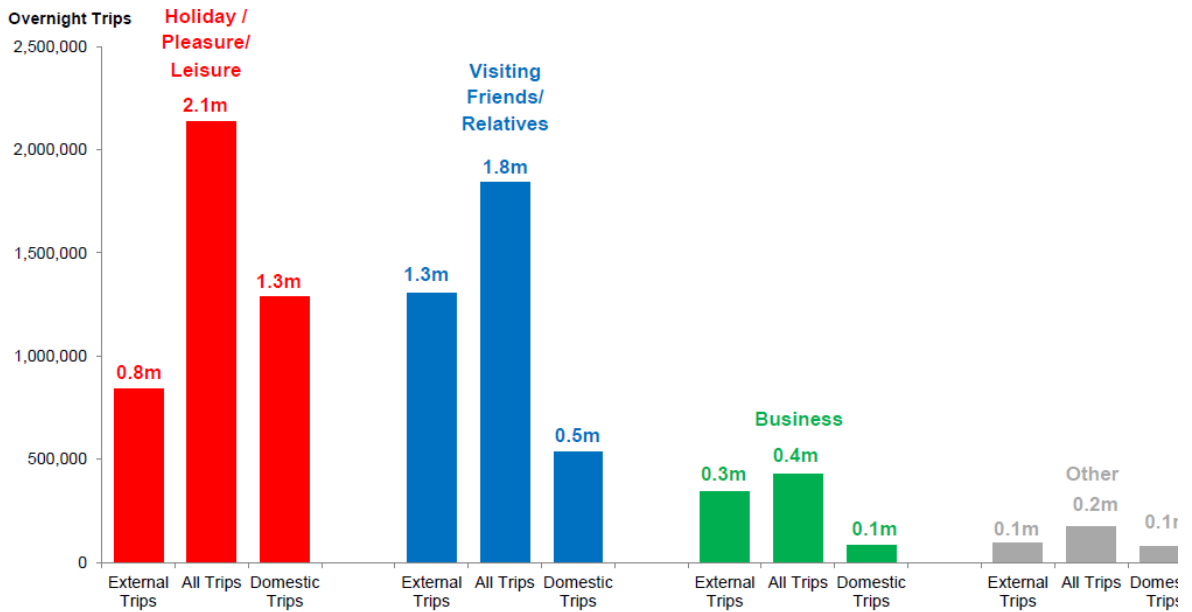


Table: 2.5 Purpose of Visit by all Trips 2016 Source: NISRA/D

The above table indicates the importance of the domestic market in volume terms and also the remaining significance of the Visiting Friends & Relatives (VFR) market. The holiday element of visitors has increased significantly over the years.

While the 2016 results kept up with the pace of recent growth some indications appeared in 2017 of a slowing down of markets. There are many concerns on the horizon that make looking ahead to 2018 (and well beyond) and future tourism performance, considerably difficult. These are the key issues for all of Northern Ireland’s tourism industry:

Issue	Comment
Currency	Recent weakness of £ Stg makes Northern Ireland attractive for overnights from non £ Stg areas and for day tripping /shopping from ROI. Forecasting exchange rates is difficult to say the least. By early 2018 the £ had recovered somewhat against the US\$ but not the €.
Brexit	This is a concerning issue depending particularly on the results of negotiations and the outcome in terms of a ‘hard’ or ‘soft’ border with ROI. A hard border will impact adversely on tourism and day tripping, particularly for shopping. The implications for promoting All Ireland by Tourism Ireland with a hard border in place are potentially very significant and as yet are not understood.
Political Stability	At the time of writing the local political impasse has lasted over a year – and has not had an impact on tourism so far. The apparent stability of the last decade has helped the growth of tourism in a major way.

DfE and TNi’s new Tourism Strategy for Northern Ireland which is not yet available in Draft must take account of the above issues.

2.2 Lisburn & Castlereagh Tourism Data

NISRA - DfE

The Official Northern Ireland tourism statistics prepared by NISRA for DfE provide a snapshot of local authority tourism performance for 2016. The table below indicates the number of overnight visitor trips to LCCC for that year – 170,000.

This is a substantial increase on the 131,000 nights reported in this data for 2015 and now lifts Lisburn & Castlereagh from 11th to 10th in the Council areas 'league table of visitors' moving it ahead of Armagh, Banbridge & Craigavon. Belfast dominates this table due to its high and increasing numbers of hotels.

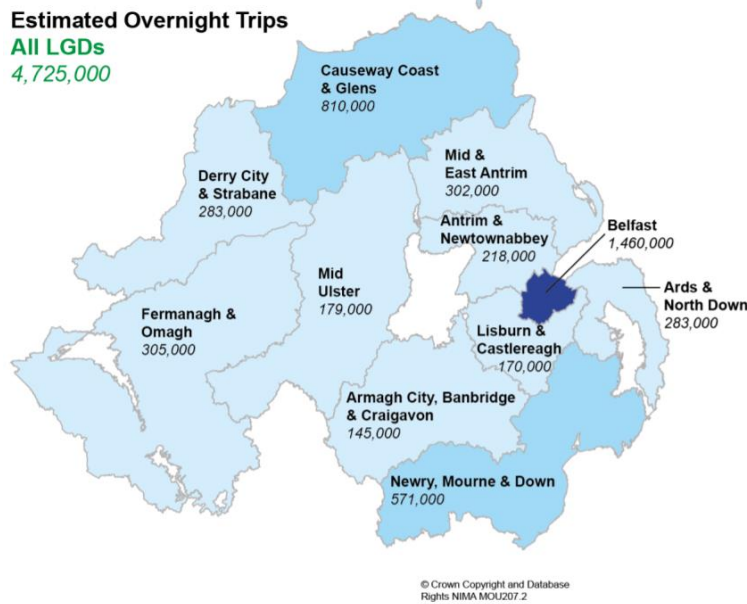


Table: 2.6 LGD Overnight Trips 2016 – Source: NISAR/DfE

The tourism expenditure assessed for Lisburn Castlereagh in 2016 was £27m an increase of £2m from 2015 and placing it ahead of Armagh, Banbridge and Craigavon area.

LCCC had a higher proportion of overnight visitors on business (13%) compared to the Northern Ireland average of 9% - a higher proportion of VFR (58%) against the Northern Ireland average of 40% and a smaller proportion of holiday overnights (29%) against the Northern Ireland average of 47%.

Once again there was no hotel performance data from Lisburn Castlereagh included in the Northern Ireland performance data as the sample size from the four hotels in the area was not adequate for reliable estimates.

The table below 2.7 indicates the estimated Trips, Nights and Expenditure by council area across Northern Ireland for 2016:

Council Area	Trips	Nights	Expenditure £
Antrim & Newtownabbey	217,829	672,929	38,430,028
Ards & North Down	283,229	1,087,260	45,907,686

Armagh City, Banbridge & Craigavon	144,977	726,351	25,550,338
Belfast	1,459,760	4,433,128	334,148,255
Causeway Coast & Glens	809,851	2,471,697	137,562,031
Derry City & Strabane	282,939	909,898	50,240,461
Fermanagh & Omagh	305,021	954,640	54,192,840
Lisburn & Castlereagh	169,913	592,198	27,233,808
Mid-East Antrim	301,768	1,056,020	46,194,802
Mid Ulster	178,555	713,624	30,268,500
Newry, Mourne & Down	571,400	1,562,073	60,978,919
Grand Total	4,725,242	15,179,818	850,707,668

Table: 2.7 Estimated Overnight Trips, Nights, Expenditure – 2016 - Source: NISRA/DfE

Once again it is worth noting that overnight visitor numbers are largely determined by availability of accommodation for visitors and therefore LCCC is likely to perform poorly because of its paucity of notably hotels.

Estimates of employment in tourism in the council area are harder to access. The most recently published data by NISRA is for 2015 and there is no specific tourism category. Accommodation and catering is usually used as a proxy and this shows that in the council area some 2,830 were employed in this category compared to 2,765 in 2013 – an increase of 7.5%. Other categories have a partial input to tourism and it is likely that just under 4,000 are employed overall in tourism with contributions from the Arts, Entertainment and Recreation category and some from Transport and Other Services.

Kantar Millward Browne – Performance Data

An alternative source of performance measurement for tourism in the area is through a survey prepared by Kantar Millward Browne for LCCC. It was originally based on the Belfast Tourism Monitor and is now a bespoke piece of work for LCCC.

This data is considerably different to the official data as it is based on an entirely different methodology and set of definitions. It collects data to estimate shopping trips from other council areas for example which does not meet international tourism definitions. However, it does provide useful comparators to understand the scale and importance of visitation particularly to local business.

Visitor volumes

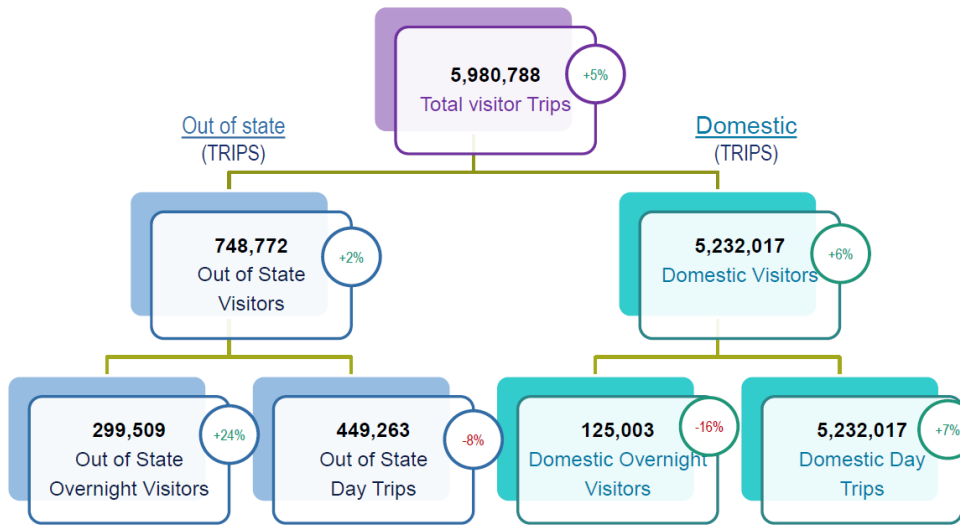


Table: 2.8 LCCC Visitor Volumes 2016: Source Kantar Millward Browne

The survey estimates nearly 6m visitor trips to the council area in 2016 - the vast majority of which are local visitors - and it is likely many of these are for shopping trips in the area's high-profile shopping centres. This survey estimates the number of out of state visitor overnights at more than double the level of the NISRA surveys. The comparator percentages relate to 2014 when the survey was last carried out.

The scale of spend in the area may be seen below:

Visitor spend

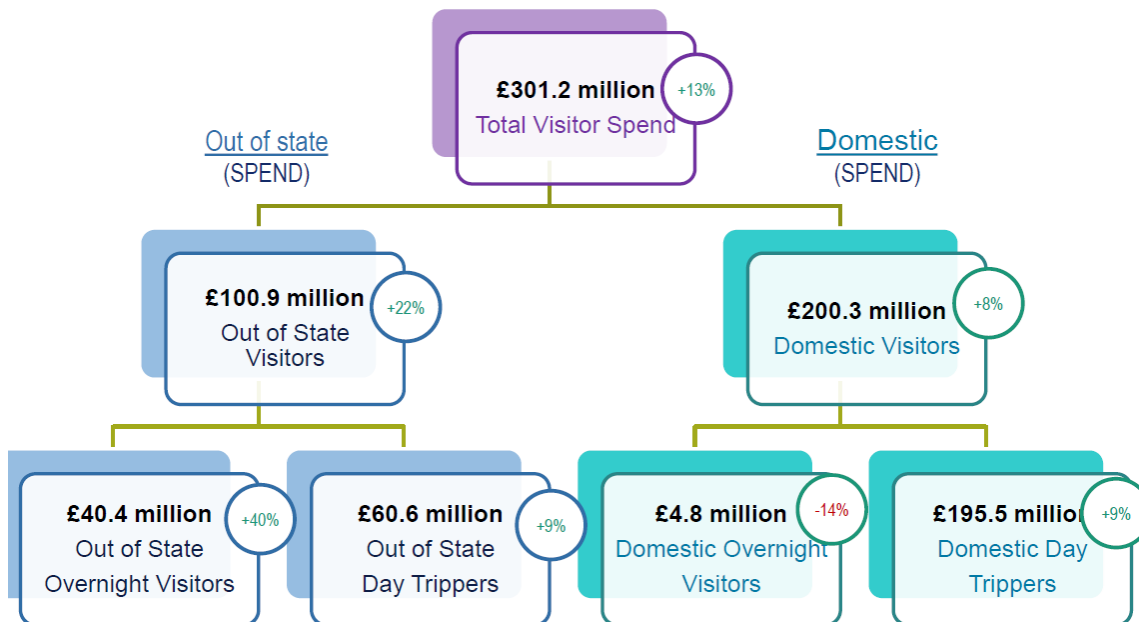


Table: 2.9 LCCC Spend Volumes 2016: Source Kantar Millward Browne

With the overall total estimated at nearly £301m some £196m of this is believed to come from domestic day trippers – again most likely shoppers. Out of state day tripper spend is estimated at nearly £61m while out of state overnight visitor spend comes to £40.4m.

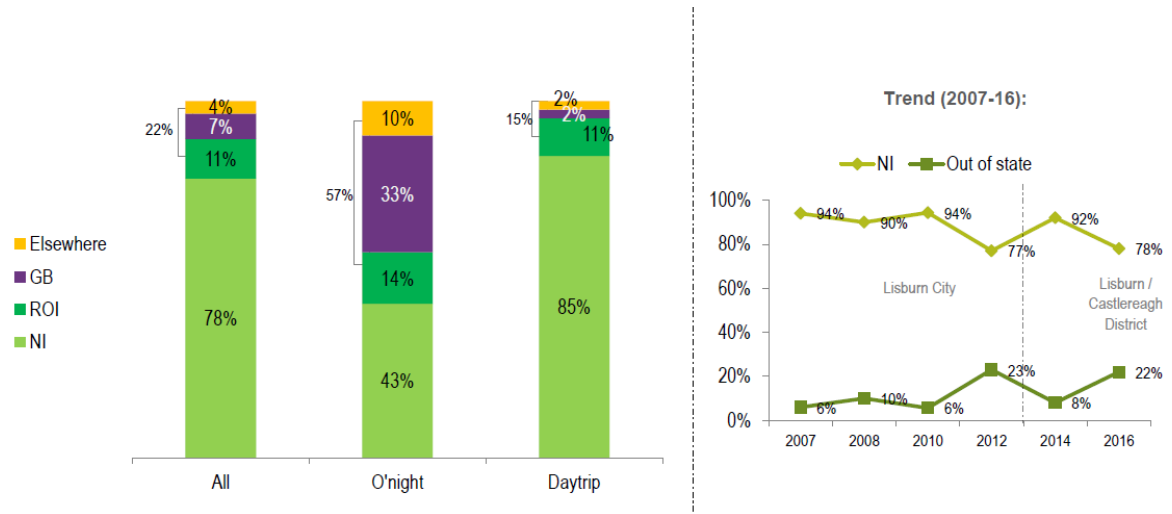


Table: 2.10 LCCC Source of Visitors 2016 Source: Kantar Millward Browne

The above table indicates the predominance of the Northern Ireland market both overall and for daytrips plus its significance in overnight stays as well. The variation in percentages in the inset table reflects survey methodology but for 2016 indicates an improvement in out of state percentages.

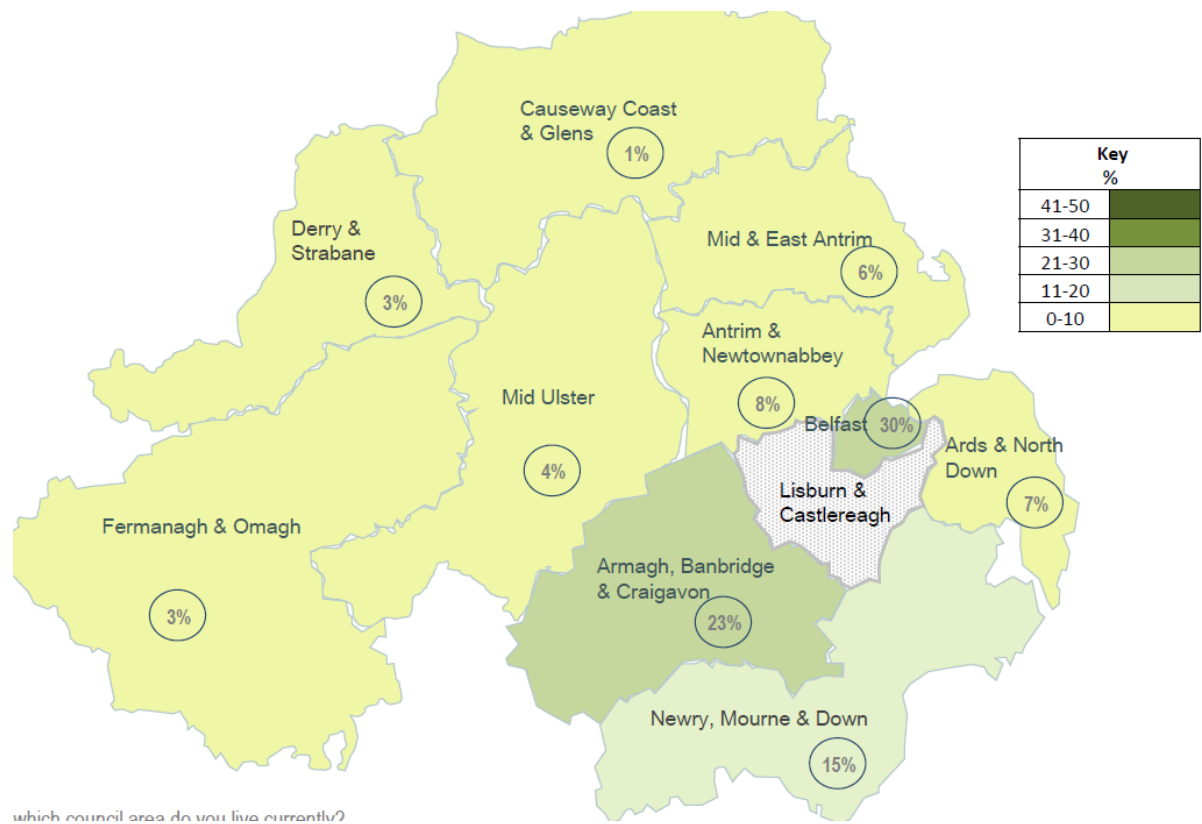


Table: 2.11 Origin of NI Visitors – Source: Kantar Millward Browne

As is to be expected the contiguous areas supply most visitors from within Northern Ireland, because of the shopping day trip.

Day trip spend from Northern Ireland residents was focused 50% on shopping, 27% on eating out, 12% on entertainment and 11% on transport.

The three main reasons for Northern Ireland day trippers visiting the area were shopping (25%); visit an attraction (25%) and attend an event or festival (25%) – shopping was the main reason for out of state day trippers (39%).

Attractions

It is helpful to examine the perceptions of local and out of state visitors relating to the attractions of the LCCC area. These are seen in the tables below with first Northern Ireland residents.

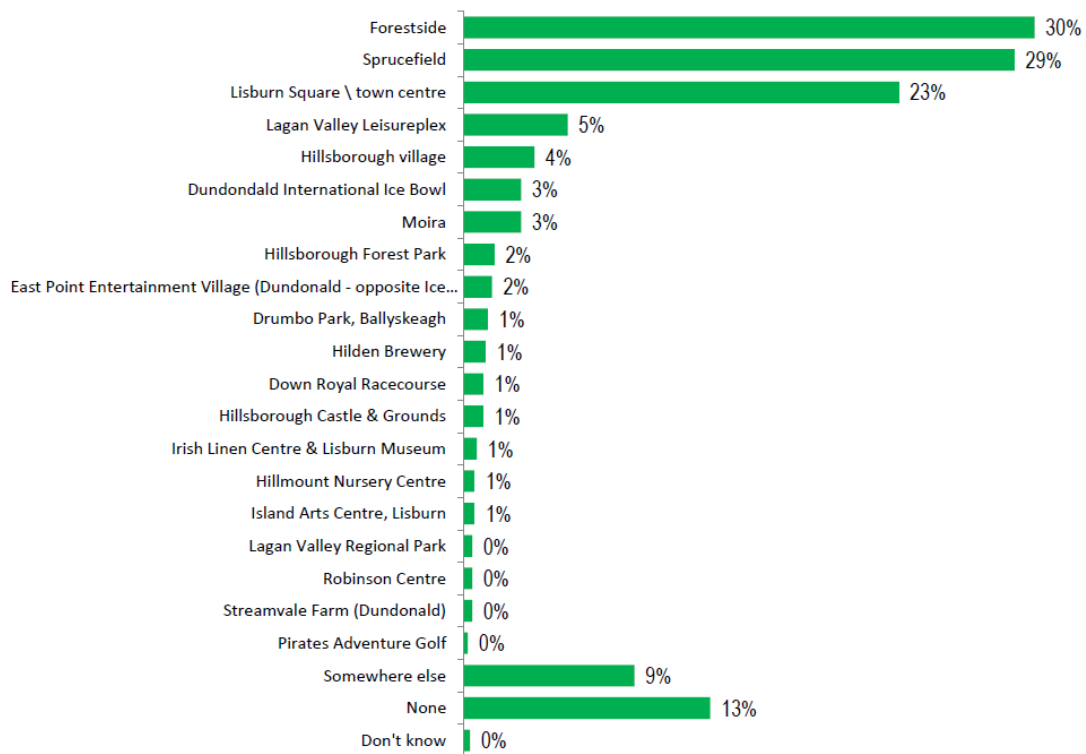


Table: 2.12 NI residents most popular attractions 2016 – Source: Kantar Millward Browne

Shopping clearly heads the list with the three leading shopping complexes perceived as attractions.

For out of state visitors the popularity poll is remarkably similar to that of Northern Ireland residents except that geographic ease of access, places Sprucefield and Lisburn centre ahead of Forestside.

The Balmoral Show does not appear at all as presumably no sampling took place at it.

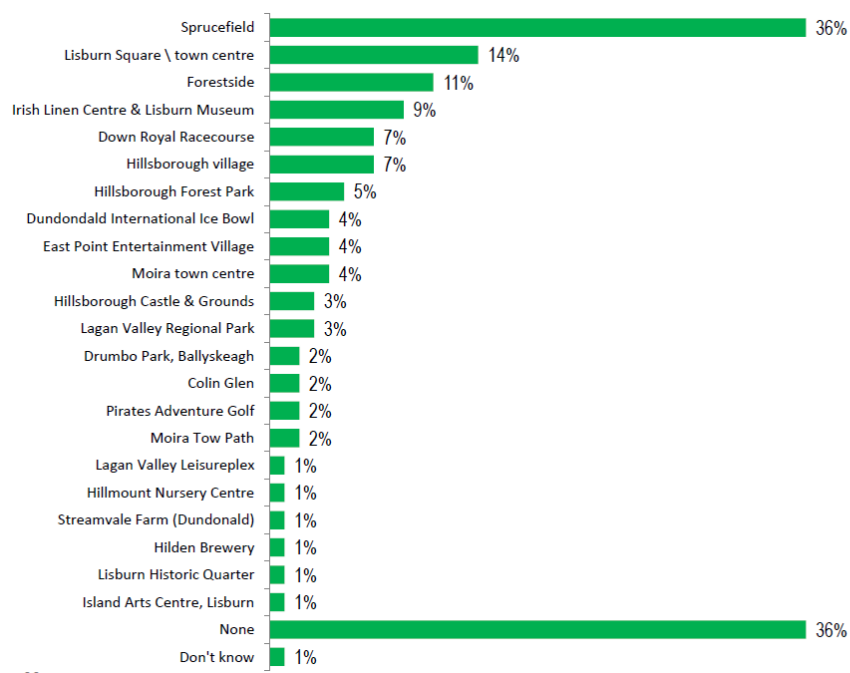


Table: 2.13 Out of state visitors most popular attractions 2016 – Source: Kantar Millward Browne

Lastly it is valuable to consider the activities undertaken by both local and out of state visitors during their visits. These are seen in Table 2.14 below:

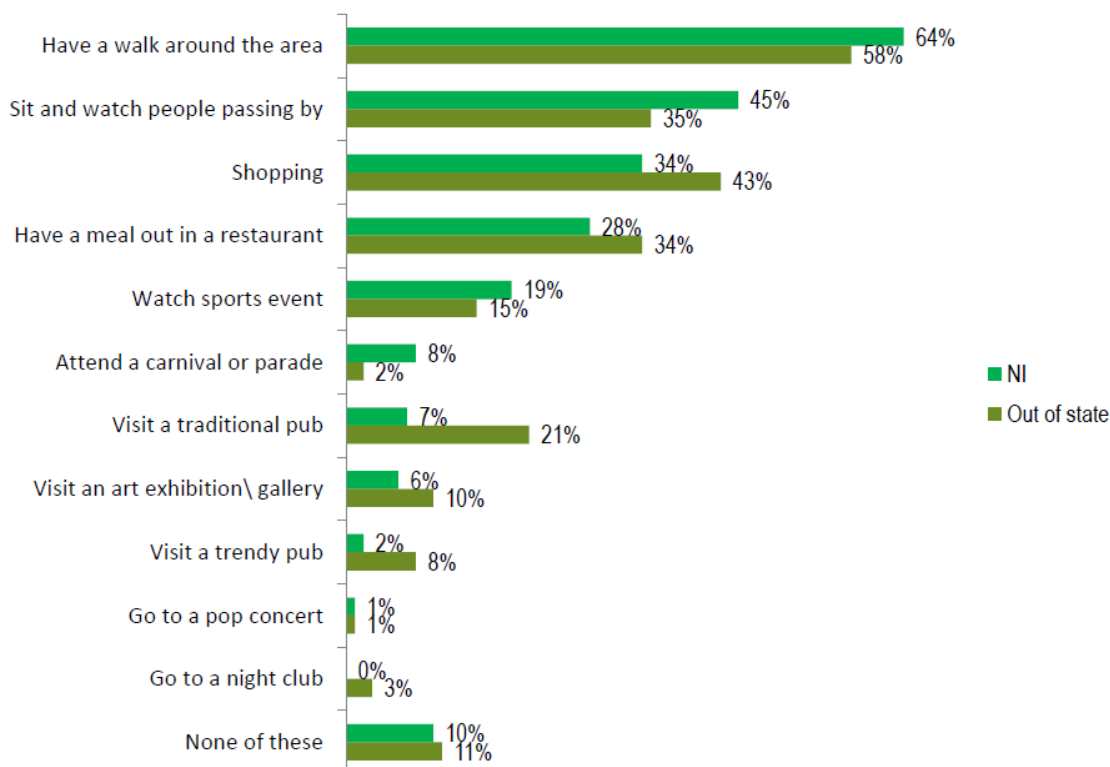


Table: 2.14 Activities undertaken by visitors 2016 – Source Kantar Millward Browne

The range of activity is relatively passive with walking, watching the world pass by, eating and shopping out in front. The development of more participatory alternatives in terms of events, festivals and things to do or take part in has clear potential.

2.3 Conclusions

The straightforward position is that the LCCC area has one of the lowest level of overnight visitors to Northern Ireland because there is a poor supply of accommodation should such visitors wish to stay. In recent years, the growth of hotel development in Belfast has been dramatic making it somewhat inevitable that visitors choose to stay there even if their focus is on LCCC business or tourism.

However, the LCCC area receives major numbers of day visitors from both the home and ROI market because of its outstanding shopping opportunities and growing range of attractions and events. As visitors' main expenditure usually relates to accommodation and meals, the fact that they visit Lisburn Castlereagh but stay elsewhere must be considered both a loss and an opportunity.

3. Strategic Context

3.1 World Perspective

According to the UNWTO (United Nations World Tourism Organisation) 2017 saw record growth of 7% in world tourism arrivals – to 1,322m.¹ This was the eighth consecutive year of tourism growth since the economic crisis of 2009. Europe led the growth surge through the Mediterranean destinations (described by WTO as extraordinary growth for ‘such a large and rather mature region’) – Africa saw 8% growth, Asia-Pacific 6% and the Americas 3%. Growth for 2018 is forecast at 4-5% which is an increase over their previous forecasts of 3-4%.

The longer-term outlook from UNWTO, forecasts continuing growth to 2030 at the rate of 3.3% per year. By then the market share of tourism for the emerging economies of the world is expected to reach 57% from the current 45%.

As always long-term tourism forecasting is subject to many provisos and concerns that can impact growth – often adversely.

Regarding the UK, 2017 looks set to have welcomed an additional 6.2% in visitors (up to 39.9m) but with a much larger increase in spend of 14% to £25.7b. This substantial increase is related to the fall in the £Stg following on from the Brexit vote.

Visit Britain is forecasting a 4.4% increase in visitor numbers for 2018 (41.7m visits) and a spend increase of 6.8% to £26.9b. Visit Britain stresses that there are a number of ‘risks and uncertainties’ surrounding their forecasts - all Brexit and currency value related – pointing out that the end of 2018 leaves Brexit only 3 months away and no certainty over what may or may not have been agreed with the EU.

In the Republic of Ireland 2017 was again a record year for tourism with an 3.6% increase in visitor numbers to 9.9m generating €8.7b visitor spend. However, the GB market did decline by 5% reflecting Brexit issues. Growth for 2018 is forecast at between 3 and 5% with the only market in question again being GB. Future growth is forecast to remain high particularly with increasing air connectivity with the only constraint being capacity problems in the greater Dublin area.

In short therefore the world tourism economy remains buoyant with only the issues of global terrorism and Brexit providing concerns over rates of growth and direction of travel flows.

3.2 Northern Ireland Draft Programme for Government (PfG)

The Northern Ireland Programme for Government is strongly supportive of tourism. In doing so it recognises that a tourism destination is most successful when it is a natural part of a welcoming society. This one that cares for its environment, natural and built heritage; that inspires its people, nurturing their confidence, health, creativity and innovation so that they realise their full potential. It also invests wisely in its infrastructure, making Northern Ireland an increasingly sustainable and attractive place to live, work, learn and visit. Tourists can, in turn, help achieve these outcomes: for example, by paying admission to attractions, theatres, forest parks and the like, thereby contributing to the care of the natural and built environment. One of the successes of NI2012 was the way it increased people’s confidence in the future and the PfG re-states that raising confidence in the future continues to be a desirable outcome.

¹ WTO Press Release 15 Jan 2018

In an innovation that seems long overdue, the PfG proposes that Northern Ireland should join the Nations Brand Index. This provides a clear indication of the desire to make NI a better place and to raise awareness of its potential and position in the world

3.3 Draft Northern Ireland Tourism Strategy

A draft tourism strategy for Northern Ireland prepared some years ago was never published as a formal strategy. It depended on inter party agreement and remained in limbo permanently. Nevertheless, the Draft Strategy did guide the direction of tourism development in Northern Ireland which remained on an upward growth path. This draft strategy set challenging growth targets to 2020 back in 2010, which are expected to be met and a new draft strategy – which has not yet been published – will once more have set a new range of demanding challenges for Value and Volume Growth.

Any Northern Ireland strategy should harmonise with Tourism Ireland’s Strategy and Marketing Plans as the island is promoted as an entity in Tourism Ireland’s markets. The Tourism Ireland approach is seen in the next section below.

It is likely that in the future, tourism in Northern Ireland will be even more market led, experience driven and product focused. With the focus seen in the Republic of Ireland on major brand propositions – the Wild Atlantic Way and Ireland’s Ancient East - there is likely to be a need to contribute a similar scale of experience brand covering Northern Ireland to fit within the brand architecture of the island as a whole.

This tourism strategy should take cognisance of these issues and ensure that there is an overall convergence of approach.

Core markets and core segments must link together and ensure that the local products and experiences enhance the overall Northern Ireland offerings aiming for internationally competitive products. Key overseas markets for Northern Ireland are GB, France, Germany and USA while the key segments remain as the Culturally Curious, Social Energisers and Great Escapers.

Even if a Draft Strategy for Northern Ireland remains unpublished Lisburn & Castlereagh can keep harmonised for growth through working closely with Tourism Northern Ireland and where possible working in partnership.

3.4 Tourism Strategy for Ireland

Tourism Ireland’s Corporate Plan (which must be approved by the North South Ministerial Council) covered the period 2014-2016 and should now be under review for its successor plan. There is a new 2017-2020 Corporate Plan but due to the current lack of political agreement in Northern Ireland it has not been made available externally although it is understood it guides the work of Tourism Ireland.

The Corporate Plan from 2014-2016 had two goals:

- ✓ Increase tourism to the island of Ireland;
- ✓ Support Northern Ireland to realise its tourism potential.

It had as its Mission to:

- ✓ Continue to grow overseas tourism to the island of Ireland;
- ✓ Increase market share of international tourist arrivals and revenue;

- ✓ Increase Northern Ireland's share of the island's growing tourism business.

It may be expected that the 2017-2020 Corporate Plan also includes some specific Northern Ireland elements.

In the meantime, the Marketing Plan for 2018 (which is published) indicates a forecast for 2018 of a 6% increase for tourism numbers. The Tourism Ireland key promotional themes for Northern Ireland in 2018 – to promote iconic holiday experiences include: the Causeway Coastal Route, Titanic and Belfast – the latter including Hillsborough Castle & Gardens as a distinctive destination.

3.5 Visit Belfast

Visit Belfast is the marketing and visitor servicing organisation for Greater Belfast's tourism industry and is funded by Belfast City Council and TNI and is a membership organisation. Currently Lisburn & Castlereagh City Council 'buy in' to a Belfast Plus concept. The overall Belfast approach is driven through the Belfast Integrated Tourism Strategy 2015-2020 where the Vision is to:

"Build prosperity for our community by becoming a world leader in innovative, dynamic tourism development and marketing supported by an unrivalled desire to give all our guests unique Belfast experiences" and where the Mission is:

"Belfast - a city that wants to welcome the world and to share its story by creating a destination that the world wants to experience first-hand". To this is added the strategic goal of doubling tourism by 2020 which appears to be well on course.

For Lisburn Castlereagh, a highly successful neighbour is both a challenge and an opportunity.

In addition to this key partnership the Council has a relationship with the Lough Neagh Partnership at modest cost. Lough Neagh touches on the council area in a very limited way but nevertheless there are opportunities for tourism in places such as Moira and Glenavy notably from tours run by the Lough Neagh Marketing body. At the time of writing food tours are under consideration which harmonises well with the Moira product.

3.6 Belfast Region City Deal

In November 2017 the Chancellor's Autumn statement advised that the Government would open negotiations for a Belfast (Region) City Deal as part of its commitment to 'a comprehensive and ambitious set of City Deals for Northern Ireland'.

A City Deal is defined by Government as follows: "A City Deal is an agreement between government and a city. It gives the city and its surrounding area certain powers and freedom to: take charge and responsibility of decisions that affect their area, do what they think is best to help businesses grow, create economic growth". City Deals applied only to England originally in 2013 and were later extended to Wales and Scotland. For example, the Cardiff Region City Deal is worth some £1.2b and expected to lever some £4b from the private sector and generate some 25,000 jobs.

The key themes for the Belfast Region City Deal are: Infrastructure, Innovation, Skills for inclusion and Skills for growth.

For the tourism sector Infrastructure is the relevant theme as it is to cover tourism, transport and digital.

To receive backing it is anticipated that tourism projects need to have stand-out and the potential to generate significant additions to the GVA of the region. It is seen as essential that the themes and interventions are interdependent and that the Belfast region partners work together to develop programmes of work across each of the key themes.

Lisburn/Castlereagh area – and its tourism sector - could benefit substantially from this new approach for Northern Ireland investment.

3.7 LCCC Corporate Plan

The council's Corporate Plan covers the period 2018-2022 'and Beyond'. The council's Vision is *"To be 'a progressive, dynamic and inclusive council, working in partnership to develop our community and improve the quality of people's lives' and the values we operate by"*.

The Plan has four strategic themes one of which relates to the Economy. Under the corporate actions to be taken to grow the economy, the third is to:

"Build on our reputation as a place to visit, promoting the natural and historic assets of our city, towns, villages and countryside to attract greater numbers of international and national tourists".

3.8 Lisburn and Castlereagh Community Plan 2017-2032

The Community Plan is a statutory requirement. Prepared by the Community Planning Partnership made up of 15 organisations that serve the community, including the Council, Tourism NI and Invest NI this draft plan is currently out for consultation with a view to publishing the final plan by April 2017. Government Departments are required to have regard to the Community Plan.

Lisburn and Castlereagh City is among the wealthiest places in Northern Ireland. The City is blessed with excellent road and rail transport links – although not between Lisburn City and the Castlereagh Hills area directly. The built and natural heritage of the City are impressive. Half the population live in the countryside of rolling hills. This combination of strengths offers real potential for developing tourism. There is an explicit acknowledgement that Hillsborough is well placed in the short term to exploit these opportunities with development already underway at Hillsborough Castle (expected to be attracting 200,000 visitors by 2020). There are related plans for the Forest Park and public realm in the village.

The vision of the Community Plan Partnership is:

- *an empowered, prosperous, healthy and inclusive community.*

Sustainable Development is seen as fundamental in the legislation on Community Planning. All actions will be checked to ensure they have at least a better than neutral impact on sustainability.

Their mission is:

"Working together to deliver better lives for all".

The mission is informed by three core principles:

- Sustainable development;
- Equality;
- Participation.

The plan is built around five key outcomes under the themes of:

- Children and Young People;
- The Economy;
- Health and Well-being;
- Where we Live;
- Our Community.

While tourism can provide beneficial outcomes for all of these themes, the plan places emphasis on its role in *The Economy - Everyone benefits from a vibrant economy*². The importance of a vibrant economy cannot be over-emphasised. It is also true that tourism is most successful when it is part of a diverse, vibrant and thriving economy contributing to a sustainable future where goals for people, planet and prosperity are harmonised.

Specific references are made to Hillsborough Castle and the short-term opportunities to attract their 200,000 visitors to other historic and natural attractions in the City.

3.9 Local Development Plan

Lisburn & Castlereagh City Council's new **Local Development Plan (LDP)** will guide investment decisions and sets out the Council's policies and proposals for the use, development and protection of land in the Council area. It will consist of the following two documents:

- **Plan Strategy** which provides the strategic framework for the Council area as a whole; and
- **Local Policies Plan** which sets out the Council's local site-specific policies and proposals relating to the development and use of land across the Council area.

In March 2017, the Council published the **Preferred Options Paper (POP)** as part of the Local Development Plan process. This document facilitated debate and outlined the vision, strategic objectives and a range of options for dealing with key strategic planning issues affecting the Council area. In total 30 key issues were identified and grouped into 6 over-arching strategic objectives. Of particular relevance to tourism is:

Strategic Objective D - Promoting sustainable tourism, open space and recreation.

Under this strategic objective, the POP identified the following three Key Issues and Options:

Key Issue 18: Promoting Hillsborough Castle as a Key Tourism Destination: The Preferred option stated: *Hillsborough holds a unique place in Northern Ireland history and is recognised as being a major contributor to the local and regional economy. Responses to the POP widely supported this option.*

Key Issue 19: Promoting the Lagan Navigation as a Key Tourism / Recreation Opportunity Area. The Preferred Options stated: *The 'Discover Waterways Lisburn' project is a unique opportunity for the creation of a key tourism opportunity area, providing a rich historical and cultural asset which, if implemented could make a significant contribution economically and environmentally. Responses to the POP widely supported this option.*

Key Issue 20: Protecting and Promoting the Lagan Valley Regional Park as a Key Tourism / Recreation Opportunity Area: The Preferred Option stated: *Protect and promote the Lagan Valley Regional Park as a rich natural asset, retaining and enhancing the Lagan Valley Regional Park Nodes: further opportunity exists to enhance the tourism/recreational potential of the*

² The strapline is taken from Theme 2 The Economy outcomes in the draft Community Plan

council's environmental assets including enhancement of the LVRP Nodes. The response was considered neutral in relation to this Option but on balance indicated support.

The resultant **Public Consultation Report** (September 2017) on the POP highlighted general support of the majority of the Council's Preferred Options and these will inform the LDP process going forward.

The LDP will recognise the contribution of the built and natural heritage in supporting the growth of tourism, culture and leisure activities and supports sustainable tourism in key locations. The Tourism Strategy of the LDP will promote a sustainable approach to tourism development, protect identified tourism assets, and provide further opportunities to facilitate the development of tourism infrastructure within the Council area. Importantly, the LDP will have regard to the Council's Tourism Strategy in developing its own strategy, policies and proposals for tourism, with the aim of supporting sustainable tourism growth.

A draft of the LDP is expected shortly.

3.10 West Lisburn Development Framework, incl. Maze Long Kesh (MLK)

The development of the 1,000 acres to the west of Lisburn is underway with the investment made by the Royal Ulster Agricultural Society at MLK.

Current plans to expand the Eikon Exhibition Centre will make it the largest exhibition centre on the island of Ireland. The growing number of events including the annual Balmoral agricultural show, attract visitors from throughout Ireland and Great Britain. The development of a science park focused on agriculture and food coupled with opportunities attract international agri-food businesses could contribute to an exciting future. High quality food is an increasingly important part of the tourism mix.

The Ulster Aviation Society has assembled an outstanding collection of aircraft, archive material and equipment housed in two WW11 hangars that are listed buildings. The Society is working towards full museum status. Due to its contract with its landlords it is prevented from fully opening the two hangars to the public and so this collection and the enthusiastic volunteers currently provide only a constrained benefit for tourism. Only pre-booked tours are permitted and advertising is limited.

Meanwhile, the future of the prison and associated proposals await a political agreement and resolution. The development of the prison buildings that are listed could provide a major tourism boost using the same model that has been successful at Crumlin Road Gaol in Belfast.

While these are important steps forward the opportunities to realise the full and very exciting prospects arising from the Framework can only be realised with the implementation of the Knockmore M1 Link Road. Within this Framework the extension of the Lagan Valley Regional Park and navigation offer additional potential for tourism.

At present the West Lisburn area is not integrated as a tourism destination but consists of a series of 'parts' which contain many tourism highlights. With the development of Hillsborough for tourism, the potential of the MLK sites, Down Royal Race Course, coupled with Lagan Canal restoration, sporting events and the key shopping attractors - there is potential for the area to become a tourism destination in its own right

3.11 Lisburn City Centre, Lagan River and Navigation

Lisburn City Centre has gone through a period of remarkable change during the past decade or so. City status and its accessible location have inspired investment. The City has become a significant shopping centre with some very pleasant spaces.

Since the turn of the century these include the environmental improvements on Bow Street and the Market Square, the development of Lisburn Square and the Castle Gardens, increased access to the Cathedral, the Townscape Heritage Initiative on Bridge Street and the opening of The Island civic, conference and arts centre in 2001. Improved access to the Lagan River, towpaths and the very successful Lagan Valley Regional Park was also facilitated. The start of work on Navigation House and stables, the Lock Keepers Cottage, the four staircase locks and basin is exciting.

The day economy has suffered from the growth in on-line shopping. The decline of the Linen Centre as a draw for people visiting the City has added to the problems. The evening economy remains an unrealised opportunity. These are essential ingredients for the growth of tourism in any city and a clear strategy is required to solve this problem.

3.12 Hillsborough Castle, Village and Forest Park

TTC completed the Hillsborough Tourism Master Plan in November 2015, making recommendations for:

- developments including welcome and hospitality, heritage, festivals and events, and the Forest Park;
- marketing and communications, including branding, digital tourism, social media and emerging technologies, a marketing plan, visitor information and services;
- community involvement, training and destination management; and
- an action plan for the period to 2020.

Progress has been made on implementing the recommendations, including:

- preparation of a costed master plan for the Forest Park including new access arrangements that will remove the growing traffic problems on Park Lane - an MOU has been agreed between LCCC and Forest Service of Northern Ireland and bids for funding are progressing;
- weekly farmer's markets have been successfully piloted and, subject to agreement with HRP and Transport NI and their place in the emerging public realm scheme it is hoped that they will continue; and
- progress is being made on the proposals to open The Shambles (the historic abattoir and butchery) as a centre for contemporary Arts and Crafts.

The public realm scheme is progressing and solutions are emerging for solving the difficult parking problems.

Meanwhile the investment in Hillsborough Castle and grounds is on schedule, building to the formal opening at Easter 2019, by which date £19/20m will have been invested. Direct access from the A1 nears completion, along with car parking, visitor facilities and back of house, together with investment in the Castle and gardens. The Courthouse will provide front-of-house access in the village.

The visitor numbers are targeted to build from 20k in 2017 to 40k in 2018 and 200k in 2019. Based on experience to date it is likely that numbers will be exceeded in 2017-18 – the target of 10k for 2016 was actually exceeded with a total of 15k. The Castle will continue to act as the

Royal Residence in Northern Ireland and will be closed for around 10 days in the year on a planned basis.

Work on the Courthouse will continue after formal opening and will be started on Hillsborough Fort at the same time. With these additional investments and events programme, it is anticipated that there could be around 300k visits to the Castle and Gardens within 10 years of opening.

3.13 Sprucefield

Lisburn and Castlereagh's attractions data – as provided by the council's own Kantar Millward Browne Survey for 2016 are dominated by retail attractions. For Northern Ireland residents Forestside topped the list at 30% followed closely by Sprucefield at 29% and then Lisburn Square/Town Centre at 23%. For out of state visitors the picture changes dramatically with Sprucefield topping the list at 36% followed by Lisburn Square/Town Centre at 14% and then Forestside at 11%.

The preference for Sprucefield for shopping by out of state visitors clearly reflects the source of most shopping visitors as the Republic of Ireland - for whom the geography is ideal. With exchange rate fluctuations the pull of cross border shopping changes regularly with a weak £Stg creating increased cross border demand. Whether the shopping visitors are on day trips or overnights they provide an important source of income for the district and help sustain jobs. Many shopping visitors may then be attracted to return for longer stays and to explore other attractions in the area.

Regardless of debate about future Sprucefield developments its role in attracting visitors to the Lisburn area will remain, with only the question of Brexit and a hard or soft border creating a shadow over future growth of this business.

3.14 Dundonald & Forestside

This well populated and developed area is an essential part of the Lisburn/Castlereagh mix even though it may appear as an annexe to Belfast City. Visitors will certainly not be aware of which jurisdiction they are in.

Forestside is a highly successful shopping destination which serves the local area both in Belfast and Castlereagh and may attract some cross-border shoppers – but Sprucefield and Belfast City are more likely destinations for them.

Dundonald is best known for the International Ice Bowl and the entertainment/dining complex that has emerged close by. However, the ice bowl scores only 3 to 4% interest as an attraction under the council's Kantar Millward Browne Survey. Nearby too is the ever popular Streamvale Open Farm. The Ice Bowl is close to the only caravan and camp site serving Belfast. It is operated by LCCC.

The Council is to redevelop the ice bowl complex featuring an Olympic sized ice rink, ten pin bowling, adventure play, gym, health club and exhibition space. This is a major project due for completion in 2020/21.

Its tourism significance will depend very much on how it is marketed and whether bespoke packages can be created linked to accommodation in the area.

3.15 The Countryside, including the Castlereagh Hills, the Small Towns and Villages

The countryside of Lisburn and Castlereagh is attractive, but not extraordinary, rolling land on the south side of the Lagan River and Estuary. For the most part it wraps around the south of the urban areas of Belfast and Lisburn with a mix of villages and small towns. First thoughts are that the Castlereagh Hills could be suitable for cycling but the danger from traffic means that for the most part this would only be possible if associated with a road closure programme:

- ✓ *Moira* – probably best known for its food sector with two UK Food Taste Award Champions: McCartney’s butchers, famous for sausages, deli and café; and Peter Hannan’s The Meat Merchant with internationally renowned Glenarm Organic Shorthorn beef aged in a Himalayan Salt chamber. More recently Chris McGowan’s much admired restaurant ‘*Wine and Brine*’ has opened its doors providing the missing magic in Moira’s mix of cafés and restaurants.
- ✓ *Dromara* – home to the Harry Ferguson Memorial Garden in the nearby countryside by Drumlough, and is also home to *Dromara Destroyers* motorcycle racers for whom a celebration garden is planned.
- ✓ *Annahilt* – a small but growing Northern Ireland village with Derek Patterson’s The Pheasant Restaurant in the nearby countryside.
- ✓ *Carryduff* – is, in a sense, an outlying area of the whole council geographic area yet it is an important residential area. The successful Ivanhoe Hotel is a key asset and news of a planned leisure development on the adjacent reservoir, now owned privately, can add to the potential for events and fun in the area.
- ✓ *Moneyreagh* – close by the highly popular La Mon Hotel – by far the largest in Lisburn Castlereagh and an important conference and leisure venue.

Most of the villages are not outstanding architecturally or in content and do not normally provide anything that would encourage more than a few minutes’ dwell time.

3.16 Conclusion

Hillsborough is likely to remain the main tourist destination in Lisburn and Castlereagh City for the period covered by this plan. The longer-term plans for the development of West Lisburn offer a significant opportunity to transform Lisburn and the surrounding area as does the rejuvenation of the Lagan Canal. This opportunity can fulfil the vision of the Community Plan and make the city a highly desirable place to live, work, learn and visit. The City Centre itself must also be considered for its tourism potential.

Co-ordinated improvement plans for the villages would be beneficial for residents and visitors alike, as would the growth of small tourism businesses and services across the council area.

4. Analysis of Current Position

4.1 Accommodation

As seen in the tables above Lisburn Castlereagh attracts the lowest number of overnight trips to any council area of Northern Ireland. This is in effect driven by its small number of hotels and other tourist accommodation across its area. As seen in the table below it has only 255 hotel rooms within its boundary and this plays a major part in poor overnight performance.

Hotels	Location	Rooms
La Mon	Moneyreagh	121
Premier Inn	Lisburn	90
Ivanhoe	Carryduff	29
Ballymac	Stonyford	15
Total		255

Table: 4.1 Hotels September 2017 Source: TNI - TTC

Lisburn Castlereagh is the only council district in Northern Ireland that does not appear in NISRA's hotel occupancy survey results as the sample of hotels is too small. For Guest Houses / B&B's the 2017 occupancy rate was 37% Room Occupancy. Guest Houses and B&Bs or self-catering units do add valuable capacity and an engaging product but it is the scale and size of hotel accommodation which drives performance. Guest accommodation which is defined as accommodation linked to restaurants and pubs can provide 'characterful' places to stay. Tourism NI's official statistics on accommodation stock in Lisburn Castlereagh are as follows at end September 2017:

LISBURN AND CASTLEREAGH CITY COUNCIL	TOTAL	UNITS	ROOMS	BED-SPACES
HOTELS				
5 STAR/4 STAR	1		121	302
3 STAR	2		44	112
2 STAR	0		0	0
1 STAR	0		0	0
UNGRADED	1		90	180
AWAITING GRADING	0		0	0
TOTAL	4		255	594
GUESTHOUSES	2		20	48
BED & BREAKFASTS	22		61	129
SELF-CATERING	37	55	128	258
HOSTELS	0		0	0
GUEST ACCOMMODATION	11		39	85
BUNKHOUSE	0		0	0
TOTAL	76	55	503	1,114

Table: 4.2 Accommodation September 2017 Source: TNI Official Data

The total illustrates the overall shortage of rooms including too many graded as unclassified and a surprisingly high number of self-catering rooms also.

This lack of hotel capacity is one of the major challenges facing tourism in the area – especially with Belfast’s hotel room stock growing at a spectacular pace.

The contrast with the Belfast City Council area stock is seen in the Belfast data below:

BELFAST CITY COUNCIL	TOTAL	UNITS	ROOMS	BED-SPACES
HOTELS				
5 STAR/4 STAR	15		1,680	3,419
3 STAR	9		833	1,748
2 STAR	0		0	0
1 STAR	0		0	0
UNGRADED	10		1,007	2,214
AWAITING GRADING	0		0	0
TOTAL	34		3,520	7,381
GUESTHOUSES	4		32	59
BED & BREAKFASTS	43		172	354
SELF-CATERING	180	347	706	1,373
HOSTELS	8		121	533
GUEST ACCOMMODATION	12		140	288
BUNKHOUSE	0		0	0
TOTAL	281	347	4,691	9,988

Table: 4.3 Accommodation Belfast September 2017 Source: TNI Official Data

In short Lisburn Castlereagh has the equivalent of almost one tenth of the total accommodation stock of Belfast and just over 7% of hotel room stock. With over 1,000 hotel rooms due to open in Belfast in 2018 this disparity will increase significantly.

The encouragement of hotel development will be seen as a priority for the area.

4.2 Attractions

Attractions play an important role in tourism in often providing the ‘raison d’etre’ to visit a destination and to have the experience that is promised. Nothing in Lisburn Castlereagh appears in the Top Ten list of tourism attractions in Northern Ireland which have a very careful definition and do not include leisure centres, retail places etc.

Closest to Lisburn and in the Top Ten are Titanic Belfast, Ulster Museum, W5 and Belfast Zoo – with Oxford Island on Lough Neagh in the opposite direction.

However, in the category of attractions that includes forest and other parks – Lagan Valley Regional Park and Wallace Park lead that Top Ten with 1.3m and 1.1m visitors respectively. Many of these users are of course locals but nevertheless the value of these assets is important in the provision of things to do for visitors. In the case of the LVRP a key consideration is the reinstatement of the Lagan Canal which will be examined later.

If *Trip Advisor* is searched for Things to Do in Lisburn Castlereagh, then the Ulster Aviation Society collection at MLK is Number 1 followed by Drumbo Greyhound Stadium and then the Irish Linen Centre.

Attraction	Comment
Hillsborough Castle	One of the most exciting tourism ‘developments’ for Northern Ireland. An estimated 200k visitors’ pa will be achieved when the major works related to Castle and grounds are finished in 2019. Potential for a true World Class Attraction exists.
Hillsborough Village	Always an attractive environment and now being enhanced by the Castle development and further plans by HRP and the Council. Huge potential.
Maze / Long Kesh	This major development site is increasing in tourism importance annually through the Balmoral Show, new exhibition centre, Ulster Aviation Society’s Aircraft Collection and potential further developments.
Down Royal Race Course	Northern Ireland’s leading racecourse and important tourism asset. Mention too should be made of Drumbo Park Greyhound Racing which attracts a regular weekly clientele year around.
Lagan Canal	At present the tourism impact is limited but reinstatement in the short/medium term will provide a significant ‘new’ asset for tourism.
Industrial	The Hilden Brewery and Coca Cola plant have potential – but the Linen Centre in central Lisburn requires updating to regain tourism significance.
Outdoors	The Lagan Valley Regional Park is an excellent asset with tourism potential as well as its recreational core values. The Castlereagh Hills also have good recreational value but are limited in tourism appeal lacking a ‘wow’ factor.
Leisure & Recreation	The area has fine leisure centres and fun complexes run by the council. Some are used for substantial events and major investment at Dundonald Ice Bowl is to take place.

Lisburn Castlereagh’s attractions have some major highlights and there is excellent potential for the future.

4.3 Surrounding areas

Tourists rarely know or care about the exact council area that they are in when visiting a destination. It is the brand name and the experience that may drive a visit or ensure that a specific place is included in a wider regional tour.

Capital cities almost always have the edge in attracting a first-time visitor to a country – be it London, Edinburgh, Cardiff, Dublin, Paris, Rome and so on. Belfast is no exception now and is the major engine in driving tourism growth in Northern Ireland.

For Lisburn being close to the Belfast conurbation or indeed part of it, can be both a strength and a weakness. It is a strength in that the large pool of visitors to Belfast may be attracted to visit the Lisburn Castlereagh area while on the other hand a time-pressured visitor may simply wish to move on to another perceived must visit destination such as the Giant’s Causeway. Belfast can also be perceived as an excellent base for visiting all of Northern Ireland – visiting other places in daytime and sampling the vibrant evening economy.

Lisburn/Castlereagh is surrounded by five council areas: Belfast, Antrim & Newtownabbey, Ards & North Down, Armagh, Banbridge & Craigavon and Newry, Mourne & Down. Three of these have significant tourism product of their own. They may be viewed as follows:

Council Area	Tourism Challenge
Belfast	The main competitor to Lisburn as it has such a major bank of tourist accommodation and a range of attractions some having significant international appeal.
Antrim & Newtownabbey	Not a strong competitor in tourism terms although home to Belfast International Airport.
Ards & North Down	Provides a coastal challenge in its resorts and range of heritage attractions including National Trust properties.
Armagh, Banbridge & Craigavon	The historic city of Armagh like Lisburn lacks accommodation and the rest of the area is also handicapped this way. Oxford Island on Lough Neagh is a substantial tourism resource.
Newry, Down & Mourne	A very different range of challenges across this council area embracing major resorts and major outdoor resources especially the Mournes. In a sense, it is also Lisburn’s main challenger for the ROI shopper as Newry City is well placed for this being the first £ Sterling shopping venue.

In the past Lisburn worked with councils such as Armagh, Newry & Mourne and North Down/Ards. Now it is linked with Belfast through the Belfast Plus initiative from Visit Belfast. Ards & North Down Council is linked this way too.

The key consideration must be what destination or destinations in harmony make sense to the visitor and this will be examined later.

4.4 Marketing and Promotion

A recent Lisburn Castlereagh tourism website ‘landing page’ is seen below:

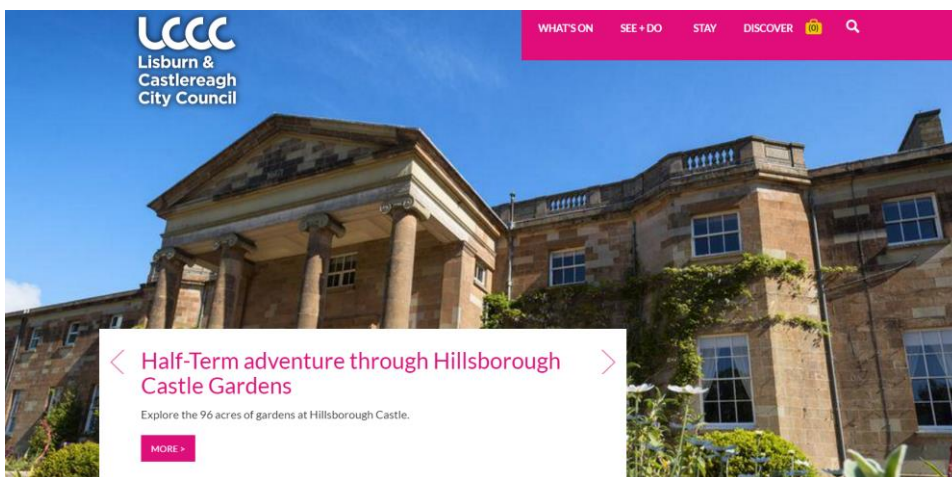


Fig: 4.4 www.visitlisburncastlereagh.com

It is colourful and vibrant and alternates images covering events and things to do. The aims of the council's key marketing spend are "to increase awareness of tourism product, compete with other destinations, ultimately increase visitors, bed stays and tourism revenue".

This is delivered through a mixture of publicity, PR campaigns, provision of collateral material and the website www.visitlisburncastlereagh.com. Advertising is limited in scale and is delivered through regional television, inflight magazines and online campaigns. Most of these campaigns target local, GB or ROI markets.

With regard to international visitors the Council participates in Visit Belfast's Belfast Plus programme and undertakes some promotions with Tourism Northern Ireland and Tourism Ireland.

The marketing issue for Lisburn Castlereagh is the dilemma of a brand that is not well known, coupled with a destination that has very limited accommodation stock, meaning that major marketing expenditure might result in nearby rivals benefitting more in economic terms than the area itself. In addition, it has destinations and indeed events within the area that are better known than the council title – Hillsborough and the Balmoral Show being cases in point.

The web presence is good in that a search for Lisburn tourism through Google brings up the council website as Number 1, followed by DiscoverNorthernIreland and quickly TripAdvisor.

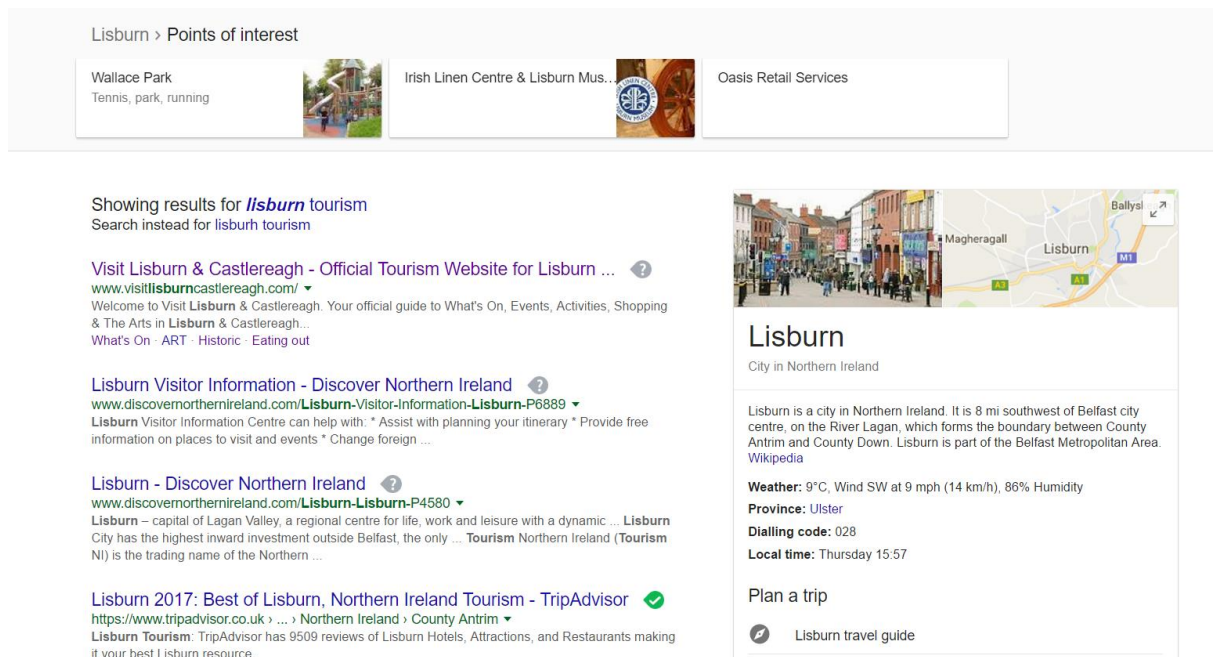


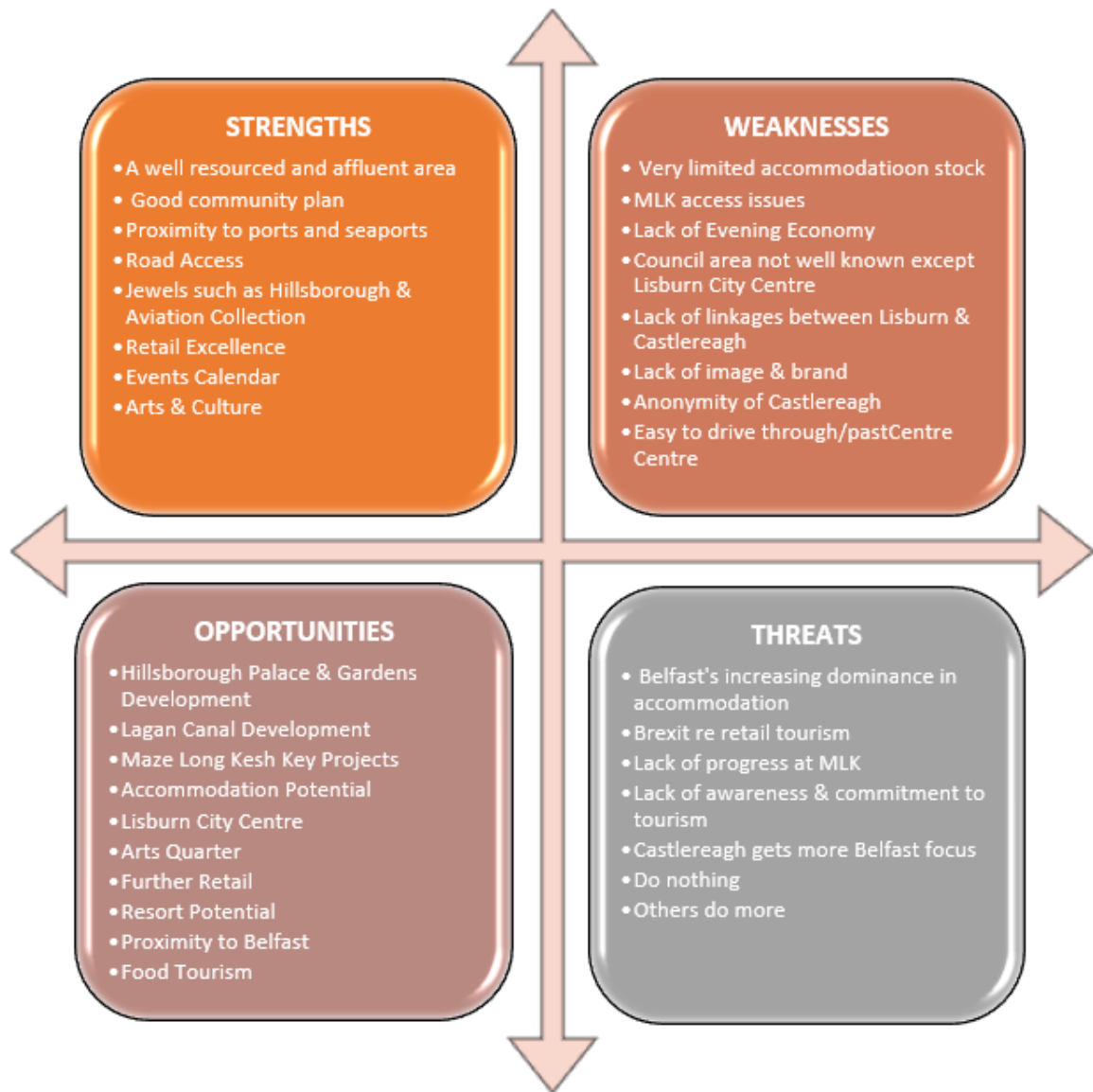
Fig: 4.5 Google search Lisburn Tourism

Consideration must be given to what the 'shop window' for tourism in the area should include as effective magnets for visitors to the area particularly from outside Northern Ireland in all marketing approaches.

Consideration too may be needed on how to integrate marketing budgets currently managed by Corporate Services, City Centre and Tourism.

4.5 SWOT

The preparation of a SWOT analysis is a traditional but effective element of developing a tourism strategy for a destination.



This SWOT reflects clearly the range of opportunities available to Lisburn Castlereagh and indicates what may be needed to deliver future success. The downsides apply to all Northern Ireland in many cases while specifically for Lisburn Castlereagh the biggest threat would come from a 'Do Nothing' approach which will certainly not be the case.

4.6 Summary

Lisburn Castlereagh is something of a curiosity in that it has outstanding strengths and potential for tourism accompanied by handicaps in brand and identity, coupled by a low level accommodation base in terms of size and availability. With the thriving Belfast tourism sector immediately adjacent there is a difficulty in securing major growth in overnight stays even in the medium term.

Despite these issues there is a solid and widely based foundation established and a number of outstanding growth opportunities under way. The springboard for growth is being established and this is the starting point for this strategy.

5. Vision, Mission and Approach

5.1 Overview – What makes a great timeless city?

Lisburn and Castlereagh's city status provides a benchmark for its vision, an idea to be fulfilled. The desire to achieve City status in itself reflects one of the principle strengths of Lisburn and Castlereagh as a dynamic place, which is not sitting on its laurels and is ambitious for the future. It follows that, by understanding what makes a city great, comparable, for example, with Lincoln, Derby, Inverness, Stirling, Norwich or Galway, a hook emerges that provides a vision. Therefore, fulfilling the promise of city status can itself provide a vision which, when fulfilled, can act as a catalyst for presenting a fresh image to the outside world. In essence:

- Great cities are places that reflect quality in every aspect of their being, that are confident about themselves – their past and their future – and are competitive when it comes to wanting the best for their citizens;
- Great cities have certain pre-requisites in terms of their cultural, scholastic and spiritual life and their environment, urban planning, design and architecture; and
- Great cities are places that look outwards and are places that people want to visit and to enjoy.

Lisburn and Castlereagh City currently exists in the shadow of a great city in recovery. Lisburn should be confident in itself as one of the Lagan Valley's twin cities. Achieve this, open the doors and the people will come!

At the beginning of every journey it is essential to be very clear about expectations along the way. The Draft Community Plan is very clear and visionary about creating a sustainable city that is vibrant, thriving and diverse. From a tourism perspective, it is essential to create a higher level of expectation for local people and visitors alike in terms of the quality and beauty of the physical environment.

This would be based on the best combination of architecture, landscape and engineering to create exciting buildings, townscape and green spaces that people will want to visit. Designed by the best architects and landscape architects they will reinforce Lisburn's desired image as a confident, successful and thriving City supported by a transport infrastructure that reflects the best in high quality contemporary engineering design.

While there will be opportunities for fine individual buildings it will be even more important to create a setting for the buildings in the way the City flows and the spaces that are created. Places should be linked and coherent so that people can move about in comfort. Key buildings would provide landmarks around which people can orientate their movements.

Physical master plans, architectural and landscape design briefs are required for each stage of development and re-development. For the new West Lisburn, this will be more straightforward. Within the existing City fabric this can only be achieved as existing buildings, spaces and infrastructure are replaced or renewed. Some of these opportunities exist today.

The master plan will be essential to help maintain the long-term vision and provide a physical framework that enables a high quality of City to emerge. Throughout, it will be essential to understand that major changes in technology are likely to occur. For example, by 2050 pollution-free transport systems such as electric cars will be normal. All great cities depend, in various ways, on their rural hinterland for their recreation and healthy lifestyle. The Lagan Valley Regional Park could provide the off-road green corridors to the surrounding countryside.

In this way, the whole can become greater than the sum of its parts.

The vision and mission that follow, pursued within the discipline of the overarching approach, are likely to lead to a wonderful place to live as well as a successful tourism destination. This will not happen overnight and there will be times when it is difficult but the promise should not be lost.

5.2 Vision – aspirational City

Lisburn & Castlereagh has significant unrealised potential and should earn the right to stand confidently alongside its larger neighbour. To fulfil that aspiration, Lisburn & Castlereagh will seize the transformational potential of doubling in size to become one of the most desirable places to live, work, learn and visit on the island of Ireland:

The City aspires to be confident, vibrant and successful, transforming itself to become a quality tourism destination, by making authentic, quality experiences: based on place, people, history, heritage, culture, the land and landscape, the arts and the creative industries.

With a ten-year horizon for city transformation the ongoing development of Hillsborough into a world-class destination will inspire further tourism growth across the whole council area.

5.3 Mission – How to get there?

Implement each stage so that in due course the whole becomes greater than the sum of its parts and Lisburn and Castlereagh City realises its full potential.

Step by step, utilising the resources of the City Council and its partners, the inspiration and energy of its community and private sector, realise the vision for Lisburn and Castlereagh City.

5.4 Overarching approach

- There will be a pragmatic approach to management and development, similar to that taken successfully in Hillsborough and, for all practical purposes already being pro-actively applied to the wider area, for example: seeking a hotel investor on a dedicated site in Lisburn City Centre; implementation of the Hillsborough Tourism Masterplan; and the decision to deliver the Knockmore Link Road.
- In keeping with the approach adopted by Tourism Northern Ireland, marketing will carefully target higher spending individuals from the *mature cosmopolitans* and *culturally curious* segments with an emphasis on overnight stays. Large numbers of lower spending tourists do not fit this profile.
- The Council is committed to creating partnerships with the private sector, government agencies, and neighbouring local authorities, as required through the commitment to the Belfast Region City Deal. The aim should be to use resources to create complementary developments, recognising that there will be competition for such resources and for investment opportunities such as hotel development.
- Lisburn & Castlereagh is currently a disparate collection of places, simply the sum of its parts, with Hillsborough offering stand-out potential as a premier destination. Promoting the disparate places as speciality boutique offerings, with a common approach to design online and on paper over the coming five years would be the first step, gradually evolving and maturing to become an integrated tourism destination in the decades ahead.

- Hillsborough's heritage of fine buildings and spaces gives it standout appeal as a place to visit and a gateway to a long-term strategy for a more diverse integrated destination encompassing for example: Lisburn Historic Quarter; Balmoral Park; Maze Long Kesh, perhaps incorporating a new National Museum; and, Down Royal Race Course; with associated events, guest accommodation and hospitality venues.
- The Council is committed to creating a high standard of design and delivery for the experiences offered by the City, among local people and visitors alike: beautiful iconic buildings, townscapes and landscapes, rooted in the highest standards of architecture, landscape architecture and engineering must be seen as normal, nothing less. The Council's new planning powers can help drive the delivery of these aspirations.
- The Community Plan 2017-2032, launched in May 2017, sets the tone, with a vision to create a sustainable city that is vibrant, thriving and diverse, providing a sound base for a successful tourism sector. The Local Development Plan – when put in place – should enhance tourism opportunities where appropriate. The Council's Corporate Plan further adds to the focus on tourism growth.
- The Council will continue the pioneering work in Hillsborough in community tourism, training, business engagement and capacity building, applying this experience across the entire Council area.

5.5 Targets

The potential for growth in tourism numbers in the LCCC area is constrained through the shortage of accommodation across the area. Even with major investments such as at Hillsborough Castle & Gardens – where 200k visitors are forecast - the benefits to the area will be limited through the inability to encourage these visitors to overnight in Lisburn & Castlereagh itself while many will stay in Belfast spending on accommodation, meals and entertainment.

Currently NISRA estimates a tourism spend in the area of £27m in 2016 a growth of 8% over 2015, coupled with an increase in overnight stays of some 30%. The council's own statistics which are produced using entirely different methodology estimate nearly 6m trips to the area - but this figure includes all shopping from outside the council area. Of these nearly 0.75m are estimated to come from across the border.

It is not possible to estimate future day visitor numbers and any attempt to do so is currently overshadowed by the uncertainty of a 'Hard' or 'Soft' Brexit outcome.

In overnight-visitor forecasting there is some guidance for the future coming from Tourism NI's concept of tourism value doubling again up to 2030 - following its doubling between 2010 and 2020 (as currently forecast). The future is believed to be bright regardless of externalities.

The NISRA data referred to above are not yet available as a meaningful time series following the reorganisation of local government. The recent increase in staying visitors of 30% is unlikely to be repeated and the realistic forecast for growth in the area is around 10% per annum – which is challenging given the constraints of limited accommodation. This ties in with Tourism NI's likely ambition to double tourism between 2020 and 2030 – following on from forecast similar results in the 2010-2020 period. Annual growth will be measured through NISRA's annual local government tourism statistics.

Employment targets are linked largely to the accommodation and catering and attractions sectors. Growth in employment will not reflect growth in visitor numbers consistently as spare capacity must be taken up. A realistic employment growth target per annum is around 3 to 4%.

6. Our Focus

It is the combination of our charming villages, our compact city and our outstanding rural landscape that makes Lisburn Castlereagh unique. For us tourism is about experiencing the smaller things that together make the biggest impression. It is about the personal touch, awakening your senses to all we have to offer and creating treasured memories.

The Council has a vision for the region's tourism and this is 'The What', 'The How' and 'The When' of what we will deliver.

With a ten year horizon for the city transformation the ongoing development of Hillsborough village into a world-class tourist destination will inspire further tourism growth across the whole council area. Hillsborough is the gemstone of our area and the village will set us apart from all other regions on the island of Ireland.

This is divided into five categories:

- Category 1 – **The Gemstone** - Hillsborough Village is our 'gemstone' due to the significant programme of development.
- Category 2 – **Refine** – We will build on the strengths we have and enhance our cultural offering.
- Category 3 – **Collaborate** – Future development will be achieved by working in partnership with private, public and community partners.
- Category 4 – **The Foundations** - Building on our foundations to realise our tourism vision.
- Category 5 – **Broadening the Charm** - The overall area will continue to be promoted and branded as a series of boutique offerings strengthening the appeal of the destination.

Category 1 – The Gemstone

Hillsborough Village will become the 'gemstone' of our area due to a significant programme of development. The investment from Historic Royal Palaces (HRP) of £20 million in the development of Hillsborough Castle and gardens, the Fort and the Courthouse will see visitor numbers to rise over 200,000 per annum.

We will deliver:

- A programme of works as per the Hillsborough Tourism Master Plan.
- A village public realm scheme including an upgrade to the existing visitor services offering.
- A growing programme of prestigious and world class events.

- A focus on Hillsborough Forest and its facilities, in cooperation with the Northern Ireland Forest Service.
- The development and expansion of visitor accommodation in the area.

Category 2 – Refine

We will build on the strengths we already have and enhance our cultural offering.

We will deliver:

- A revitalised Lisburn Historic Quarter utilising our arts and creative industries.
- The development of a City Centre hotel.
- The ongoing development of R-space Gallery at The Linen Rooms.
- A revitalised Irish Linen Centre & Lisburn Museum.
- Visitor experiences based on our charming villages.
- Support and develop visitor attractions to enhance footfall.
- Support for the growing speciality food sector, establishing the area as a culinary destination.
- Events which add value to the visitors' experience, Hillsborough, Balmoral Park and Lisburn Historic Quarter are the main venues for events in the City. Established events such as the Ulster Grand Prix, Balmoral Show and Festival of Racing bring significant visitors to the area.

6.2 Lisburn Historic Quarter

Lisburn has many strengths, it has an interesting heritage of buildings that reflect the history of Lisburn, composing a conservation area that encompasses Market Square, Railway Street, part of Wallace Avenue and the Railway Station, Castle Street, Seymour Street and Bridge Street; which is the same as the Lisburn Historic Quarter boundary.

Notwithstanding these assets, Lisburn Historic Quarter has lost its lustre in recent years with many empty shops giving way to online shopping and competition from Bow Street Mall. The Linen Centre and Lisburn Museum are suffering from a decline in the quality of merchandise in the shop, the restaurant closed and the lack of resources for exhibitions renewal, leading to lower levels of return visits.

The Museum Review, currently underway, is considering a renewal of the Lisburn Museum and possible future for the Irish Linen Centre. In the context of the broader renewal of the Lisburn Historic Quarter the museum and story of linen and its future have a significant contribution to make to the Quarter as a tourism destination.

The City Centre is mainly a day time place with little life once people have returned home from work. This makes it more difficult to sustain an evening culture³.

Nevertheless, Lisburn Historic Quarter (LHQ), has been the subject of significant improvements in recent years. A Development Strategy 2011-2021 for LHQ suggested five themes that cover investment and development; access, environment and heritage; employment and wealth

³ Studies by the Institute for Place Management (IPL) at the Manchester Metropolitan University Business School: there may be merit in becoming a member of IPL, gaining access to interesting research evidence and advice that will enhance understanding of place management research – contact: Steve Millington - steve@placemanagement.org

creation; civic pride and community engagement; and of importance to this strategy: *Tourism, Culture, Arts and Creative Industries*. A number of ideas have been discussed in recent years that could contribute significantly to this theme and if adopted as an integrated project would make a very real contribution to the value of Lisburn Historic Quarter as a tourism destination. These include:

- The development of a hotel on Castle Street on a site owned by the City Council, adjoining Castle Park;
- The HLF grant application by the R-Space Gallery at The Linen Rooms (a Community Interest Company) to renew their premises on Castle Street;
- R-Space Gallery's plan to launch an international *Linen Biennale* in 2018;
- The possible renewal of the Irish Linen Centre possibly in association with NMNI⁴ who may offer their linen collections to enhance the experience;
- The renewal of the Lisburn Museum in the Market House and Assembly Rooms is also being considered. It is most desirable that these buildings continue to maintain a focus on culture and the arts in the broadest sense;
- Examine whether there is scope for connecting with the written word, photography and moving pictures as part of the attraction of Lisburn Historic Quarter as a tourism destination.

Together these ideas, all within the control of the City Council, begin to create critical mass around the idea of a focus on arts, culture and creative industries in the heart of Lisburn Historic Quarter. The presence of SERC, with its potential to encourage the arts, culture and creative industries, and the commercial Castle Gallery, both on Castle Street, could reinforce the ethos.

This potential could be reinforced by encouraging other arts orientated businesses to occupy the area, perhaps particularly on Bridge Street and in the Market Square, for example:

- Books and literature could play an important role in the tourism offer, following in the footsteps of places like Hay on Wye, Oxford and Cheltenham in England; and Edinburgh, Wigtown and Melrose in Scotland, where second-hand bookshops and book/literature festivals attract visitors from far and wide;
- In the case of Lisburn Historic Quarter this could be augmented with film, photography and digital arts; and
- These could be complemented with artists' studios, craft workshops, and specialist retail units and cafés with more off-beat, quirky food and product offerings in the same areas – emulating the experiences to be found at Granville Island in Vancouver or the Shops at Dartington in Devon.

It may be necessary to provide some financial incentives for smaller new independents to become established, such as short-term leases and/or special rates arrangements. Inspiring younger people to try new ideas with pop-up spaces for makers and experimenters can bring life to dead areas and provide sustenance for creative young entrepreneurs to turn their ideas into reality. In places where this has been possible in the past these same young people have gone on to transform the fortunes of 'villages' in cities and even whole towns, for example, Carnaby Street and Camden Market in London or Hebden Bridge in Yorkshire.

While these suggestions are intended to reinforce the presence of independent businesses there may be merit in carefully selecting larger retail businesses who may be prepared to buy

⁴ This proposal arises from a consultation meeting with NMNI as part of the preparation of this strategy.

into the ethos of arts, culture and creative industries, supporting (perhaps even sponsoring) the growth of events and annual festivals, for example:

- Encouraging a bookshop to set up in appropriate premises on Market Square, perhaps incorporating a café, would help to reinforce the cluster of arts orientated businesses.

On this basis, there appears to be scope for a major initiative: to make arts, culture and the creative industries the essential ingredients that raise the prospects of a successful Lisburn Historic Quarter for residents and visitors alike. Indeed, there is currently a focus on the opportunities for attracting significant funding through the Belfast Region City Deal. Carefully conceived and presented, this Lisburn Historic Quarter integrated concept could be a realistic contender for tourism funding under the City Deal proposals.

The benefits of pursuing these ideas could include:

- greater footfall bringing life back to the heart of the City;
- enhanced facilities for people of all ages;
- closer collaboration with SERC; encouraging and supporting them to include more design and technology, visual, digital and performing arts and craft courses;
- a more stimulating environment for arts; enhancing, enriching and diversifying the cultural life at the heart of Lisburn Historic Quarter;
- access to the beautiful Castle Park for outdoor activities, such as small-scale festivals, performance art, outdoor theatre and music, readings, poetry and sculpture exhibitions; and
- Inspiring more people to participate in the arts and to set up studios and workshops in the heart of Lisburn Historic Quarter.

With a clear focus and engagement with the property owners, occupiers and potential occupiers, the proposals will naturally flourish and a very stimulating and inspiring place to visit could emerge.

6.3 Hospitality

The largest challenge facing the development of tourism and notably jobs and income in tourism is the lack of tourist accommodation across the whole area. As highlighted at 4.1 above the stark facts are that the area has only 255 hotel rooms or 503 in total including Guest Houses, B&B's and Self-catering. Belfast in contrast has currently some 3,500 hotel rooms and a thousand plus under construction or at advanced planning. None of these receive any form of public sector support so it is entirely a market based view that hotel investments in Belfast will make good returns.

The building space in Belfast will for some time act as brake on future accommodation development in Lisburn Castlereagh as banks and other funders may assume that market growth may take time to match the level of investment. The Brexit issue adds to the level of uncertainty for investors.

Currently LCCC gives high priority to the need for a Lisburn City Centre hotel and has identified a suitable site which will be made available to an investor and is working to secure a suitable investor-operator. This is a policy that is strongly endorsed in this Strategy as the medium to longer term effects of such an hotel can only be beneficial to the business sector, the city centre itself and to tourism overall, located as it will be in the heart of the focus on Arts in Lisburn Historic Quarter proposed in 6.2 above.

Lisburn centre lies just inside the zone where Invest NI does not offer any support to new accommodation development. There is a strategic case for using a less blunt instrument and enabling catalytic hotel developments to be supported. Such a case would be Lisburn centre and LCCC should lobby Invest NI to consider such an approach here.

Beyond this site and across the council area there may be opportunities to encourage further budget hotel development - such as at a revamped Dundonald Ice Bowl and in West Lisburn.

The Council's policy of encouraging B&B provision and self-catering – working with Tourism Northern Ireland – is also supported in this strategy. While room numbers may be small, this does not detract from the value of bringing visitors to an area for overnights and their experiencing a warm personal welcome.

As ever in the development of new accommodation lies the 'chicken and egg' question. Can successful accommodation development be achieved before the visitor numbers are there? Experience generally is that investors will not lead the way taking risks but are keener to pile in when there is clear evidence of success. This accounts for the current building 'boom' of hotels in Belfast and indeed is also seen in Dublin where runaway visitor numbers are only now levering hotel investment.

LCCC is therefore correct to maintain a twin policy of both encouraging hotel development and actively pursuing investment while simultaneously assisting and leading growth in attractions, events and other tourism development ways and means. It must also lobby Invest NI over hotel development support.

6.4 Events

The area hosts a wide portfolio of events, many of national and indeed international standing.

Ranging from the Ulster Grand Prix at Dundrod to the Balmoral Show at Maze Long Kesh to Horse or Greyhound Racing – plus a variety of Festivals and happenings that enrich the experience of both visitors and locals. The new investment in Hillsborough Castle and Grounds will lead to more events taking place there as will the re-opening of elements of the Lagan Canal. The arts remain another area of success for events and sport is clearly a key provider. Swimming, ice skating, gymnastics all provide a source of ongoing competitive events that bring visitors into the area.

Maze Long Kesh has provided a base for new events and it is to be hoped that easier access to the location will be achieved so that more visitor-oriented events can take place there. The Council led Knockmore Link Road will play a part in this, as will successful political negotiations.

In the short term LCCC must focus on continuing the growth of existing or currently proposed events rather than striving to attract major new ones. However, to do this successfully there is a need to have human resources to oversee and manage events and to develop systems to do so – even if the 'hands on' work is outsourced. LCCC needs to provide adequate human resources internally to grow this key tourism element and compete successfully with adjacent council areas.

The conundrum remains that successful events may bring much of their benefits to adjacent council areas as the accommodation is located there. A balance must be struck between seizing opportunities that arise; but clear in the limits and reach of investment.

6.5 Moira as a *foodie* destination

A Food offering within the area can provide a serious tourism product that has the potential to boost the whole area. Hillsborough is currently famed for its range of gastronomic delights but this can be wider spread.

Moira has potential to be an outstanding food destination with a strong food processing sector and a growing restaurant base. McCartney's Butchers (2011) and Hannan Meats (2012 and 2016) were the Guild of Fine Food's Supreme Champions in the UK Great Taste Awards. An outstanding accolade for Moira's credentials as a food destination. As the village increases in popularity so it will be necessary to enhance the infrastructure to support increasing use, for example:

- Moira's main problem is the need to address the heavy traffic and associated fumes and noise – walking up Main Street it often feels more like a city experience, rather than what would be expected in a 'foodie' country village. Perhaps traffic calming measures, wider landscaped sidewalks and attractive paving would help to reduce the impact of the present invasion of the senses. Therefore, a public realm scheme is suggested to reduce the impact of traffic, provide appropriate car parking and enhance the environment of the village; and
- Combined with a Heritage Lottery Fund Townscape Heritage scheme or equivalent, together with a painting scheme for those buildings not included in the Townscape Heritage scheme, will further contribute to its attractiveness as a tourism destination.
- The attractiveness of the village for tourists could be enhanced with more experience based events and activities.
- The recent agreement with Lough Neagh Tours to feature Moira 'foodie' tours is a welcome development indicating future potential.

The Moira model can be used as a template for more destinations within the area.

6.6 Down Royal Race Course

Down Royal race course is Northern Ireland's leading horse racing venue. To facilitate tourism growth from the venue there is a need for quality hotel development in the surrounding area. Currently the hotel packages for visitors to the course are based in Belfast. The horse racing product can be developed further and has appeal both in ROI and GB.

Category 3 – Collaborate

Future developments in our tourism sector will be achieved by working in partnership with private, public and community partners.

We will collaborate:

- To explore the significant tourism potential of the Maze Long Kesh site.
- To build on the success of the Ulster Aviation Society and the Eikon Centre already located at Balmoral Park.
- To work with National Museums NI to maximise opportunities to utilise the Maze Long Kesh site.
- To inspire Research & Development and innovation Centres to locate at the Maze Long Kesh Site.
- With Historic Royal Palaces, developing packages and visitor experiences for visitors to Hillsborough village and the wider environs.
- To develop packaged boutique offerings across all the local industries, including food and drink.
- With policy makers and influencers e.g lobbying for hotel development support.

6.7 Maze Long Kesh and a new National Museum

The MLK site has developed as base for the Balmoral Show, the Eikon Centre for exhibitions and as the home of the Ulster Aviation Society's major collection. Meanwhile, the future of the prison and associated proposals await a political agreement and resolution. The development of the prison buildings that are listed could provide a major tourism boost using the same model that has been successful at Crumlin Road Gaol in Belfast. Such an agreement could unlock further development potential for many projects.

During the consultation meetings with the Chief Executive Officers of Maze Long Kesh and National Museums NI it became apparent that a significant opportunity could be realised. It could add dramatically to the transformational opportunity offered by Maze Long Kesh.

National Museums NI is exploring options for the future of its stored collections and redevelopment of the Transport Museum at Cultra. They would be interested in investigating potential options further with the City Council and Maze Long Kesh. Discussions to date have entertained the idea that one option could be the relocation of the stores and the transport collections to MLK with the creation of a new National Museum covering for example, technology, industry, transport, food and agriculture, and sport – all of which have some association with the site, now and in the future.

There does not appear to be a comparable museum on the island of Ireland. This museum could celebrate the world's heritage in these fields, right through to the current day, exploring the achievements in their day but also their impact on the world around us now: for example, the unintended consequence of the impact of carbon fuelled vehicles on climate change or the importance of electricity in our lives today with a look into the future. Imagine exhibits of current technologies such as electric cars with Tesla loaning a state of the art vehicle – perhaps even an opportunity to drive the car or see it driven by an F1 champion, perhaps as part of a popular TV series.

Such a museum could provide inspiration for future achievements with R&D labs and innovation centres gathering at MLK. It is not unusual for museums to be the venue for product launches or to provide objects for conferences as a way of inspiring fresh questions and answers.

This could be a National Museum celebrating the achievements of local heroes: the product of the imagination of people like Harry Ferguson and Frank Pantridge as well as the creative genius of great inventions and innovations from around the world – be an international-standard museum celebrating international design with space for touring exhibitions from around the world.

A visit to the museum, including a few nights' sleepovers among the stored collections, could be part of the rite-of-passage for every child as they reach the age of 11. This will help to inspire their imaginations as part of the drive to encourage more to study and take up careers in STEM⁷ subjects. Perhaps they could be sent a *golden ticket* on their 11th birthday⁸. Colourful coaches carrying the Museum's branding could visit schools to collect children from all over the country.

In order for this to be achieved, the following actions are required over the next few years:

- Initial agreement will be required on the formation of partnerships, MOUs and so on, between the City Council, National Museums NI, Department for Communities and Maze Long Kesh; and others as appropriate;
- Future relationships with other interested parties, such as Ulster Aviation Society, Translink, Transport NI and the Lagan Navigation Trust will also require deliberation;
- An options appraisal, feasibility study including a costed master plan and business plan will need to be prepared and planning approval agreed; and
- The logistics of moving the stored collections and objects on display requires careful planning, possibly including construction of a railway spur to move the trains on tracks from Cultra to Maze Long Kesh, perhaps using part of the disused railway line from Lisburn to Saintfield culminating in a railway yard with sheds, where the trains can be placed on display with scope for them to be part of a living collection of objects that can work.

Category 4 – The Foundations

To realise our tourism vision we need to build on our foundations.

We will support:

- The development of the West Lisburn Master Plan, which will see the city grow significantly in coming decades.
- Development of the Knockmore Link Road, providing easier access to Balmoral park, Maze Long Kesh and potentially a new National Museum.
- The Discover Waterways Lisburn project in partnership with Lagan Navigation Trust.
- Our retail offering encouraging short breaks to the area.

6.8 Knockmore Link Road

This road links the MI at the Sprucefield Park and Ride to the A3 at Flush Park Industrial Estate passing through the Lisburn West extension, which will also benefit Maze Long Kesh, the Air Museum and Balmoral Park, including the Eikon Exhibition Centre.

This would be of enormous benefit to the city, as it would mean the bulk of traffic heading to the west of the city would no longer have to go via the city centre along Hillsborough Road as it does at present. The road would require the construction of a new bridge over the River Lagan, which would be a substantial structure. It would meet the Blaris Road. It was announced in October 2017 that a private developer has submitted a "pre-application notice" for the development at Blaris, including construction of the Knockmore Link.

6.9 Sprucefield expansion

This has been a contentious issue regarding planning permission for more development at this very successful retail site. As discussed in the analysis section it is a major draw for visitors to the area particularly from across the border. Further unique shopping developments would add to its pull for day visitors and for some staying visitors. In overall tourism terms this is unlikely to add to the general attraction of the area and Northern Ireland to overseas visitors except for cross-border shoppers.

6.10 Lisburn West – a transformational opportunity

The City of Lisburn and Castlereagh is a regional centre surrounded by the Castlereagh and Belfast Hills with major corridors of infrastructure (road, rail, fibre, energy supply, waterways, etc.) serving the City and its hinterland. The current plans for development to the West will double the size of Lisburn and provide a transformational opportunity.

While it is true that Lisburn will be a very different place in decades to come - as those years go by there will be many choices about the nature of the investment, its planning and design. There will be constant pressure to compromise on quality to save money or time. Those pressures will be at their greatest when times are hard and any investment seems valuable at any price. It is at that time that it is most important to stick to high standards.

During that time, Hillsborough will continue to grow as a tourism destination and provide the kind of quality anchor that is desirable. It will be of no avail if Hillsborough remains a high-quality destination surrounded by mediocrity.

The benchmark could be to emulate the garden cities movement of the twentieth century. There may well be merit in making properly planned learning journeys to some of those places to get a sense of the challenges that face new or expanded towns, for example, the new towns Welwyn Garden City and Milton Keynes; and the expanded towns of Thetford and Dorchester (Poundbury) will provide useful cross-section of what is possible and the nature of the challenges.

In this context, the following action is proposed:

- Prepare the master plan for the West Lisburn Strategic Framework, emulating the garden / rural city model with a landscape framework of woodland corridors throughout the area linked to the Lagan Valley Regional Park and Navigation extension, providing opportunities for walking and cycling; and for wildlife to flourish.
- Continue to develop Maze Long Kesh, particularly Balmoral Park so that it delivers on its promise. This development is rightly seen as transformational and needs to provide the cutting-edge vision that is required for the whole of Lisburn.

6.11 Lagan Valley Regional Park and Navigation

Plans to extend Lagan Valley Regional Park, which is concurrent with Lagan Navigation, offer opportunities for furthering the navigation, walkways and cycle rides established during the earlier phases of development. These are primarily of value to the resident population but provide the infrastructure for tourists to enjoy healthier pursuits and to experience the surrounding countryside. These improvements will take place in stages.

In the immediately foreseeable future on the south west edge of the Lisburn, the Lagan Navigation Trust is completing the planning and designs for the first phase of the work that will eventually make the Lagan navigable from Belfast through Lisburn, while providing the core of the Lagan Valley Regional Park extension. The project is known as the Discover Waterways Lisburn Project.

The programme of work for Phase 1 includes:

- the restoration of Navigation House, Stables and one acre of gardens, as the Trust's HQ and the home of the Waterways College, with public access to the gardens;
- the proposed purchase of the Lock Keeper's Cottage and grounds at Union Locks to become a café and boathouse;
- the restoration and re-watering of Union Locks, the only staircase locks in Ireland;
- the re-opening of Becky Hogg's Lock and repairs to the weir together with the canoe 'nursery facility'; and
- a range of new walking and access, including an extension of the National Cycle Network Route 9 through to Maze Long Kesh.

This is a first step in extending the Lagan Navigation and the Lagan Valley Regional Park.

This project is an excellent start in the context of the long-term vision for Lisburn and enhancing the health and lives of residents, while playing an important part in realising Lisburn's long-term vision with new infrastructure enhancing the prospects for an integrated tourism destination.

Category 5 – Broadening the Charm

6.12 Castlereagh Hills

The Castlereagh Hills are geographically challenged for tourism development – they are a pleasant rolling landscape but have no outstanding 'wow' factor for a visitor. Roads are heavily trafficked and there are leisure facilities such as walks, golf and excellent garden centres.

However, views are limited of Belfast Lough and to some extent Strangford Lough. The Belfast Hills Partnership operates across the Lough running from Carnmoney Hill to Slievnacloy and embracing Divis and Blackmountain. There is no such champion for the Castlereagh Hills and this is due in part to their lack of scale and impact.

The National Trust has its walk at Lisnabreeny which is popular locally as are the walks to the Rath and the Cregagh Glen Walk from Belfast.

Walking and cycling, predominantly for local people, could be significant if off-road opportunities were developed but fast heavy traffic means care is needed on many roads making this unlikely in the foreseeable future.

6.12 Dundonald

The renewal plans for Dundonald Ice-Bowl when completed in 2020/21 will provide a major leisure asset with tourism potential. If targeted as the centre of a family destination, then with a revamped council run caravan park nearby and the possibility of a budget hotel in the area Dundonald has potential as a short break destination. Currently the restaurants and other facilities nearby - such as Streamvale Open Farm – when added to the new Ice Bowl, could provide a fulfilling family destination aimed predominantly at the all-Ireland market.

6.13 Small Towns and Villages

As described in 3.14 above most of the small towns and villages are rather unprepossessing. Moira is the exception and has all the potential to be attractive to tourists as described in section 6.5 above. There is a desire, evident in Dromara for instance, with its memories of Harry Ferguson and the Dromara Destroyers, for other villages to benefit from tourism but it takes more than a monument for this to be achieved.

A simple co-ordinated light touch environmental improvement scheme would make the villages more attractive to visitors, while enhancing a sense of civic pride, well-being and quality for residents. Visitors might be more tempted to dwell awhile if there was a good quality small café, pub or ice cream parlour, offering sustenance and a moment of stillness, perhaps with some seats and tables on the pavement on a sunny day.

A visit to Scarva provides a benchmark for attracting visitors to a small village, with its gardens, bandstand, café, heritage exhibition, and cycling services: all adjacent to the Newry Canal and towpath.

In this context, it is recommended that all the villages, with priority for those listed in 3.14 be given a light-touch environmental improvement and painting scheme.

6.14 Conclusion - a new tourism destination

As West Lisburn develops in the ways proposed and outlined above a medium to long term goal is to see a new tourism destination emerge in its own right, based on the key elements of:

- ✓ Hillsborough Village, Castle and Gardens
- ✓ Sprucefield Shopping
- ✓ Down Royal Race Course.
- ✓ Culture & Arts in Lisburn Historic Quarter
- ✓ Maze Long Kesh and a new National Museum

These are all attractions at the moment that will be greatly enhanced and have much greater potential.

Element	Comment	Timeframe
Hillsborough Village, Palace & Gardens	This world class development will provide a huge reason to visit and provide a source of unique visitors to the area. Not only should the village gain benefit but it can act as an inspiration to learn more of the wider area.	Existing but with significant growth potential in the coming by 2021.
Arts, culture and creative industries in Lisburn Historic Quarter	This will greatly enhance Lisburn Historic Quarter bringing a much-needed breath of fresh air, making it a richer, more vibrant and diverse heart of the City Centre. The plans for refreshing within the area will also add to the reasons to visit in the evening, thus contributing to the evening economy.	Highly recommended development opportunity for bringing life to the heart of Lisburn Historic Quarter.
Accommodation	This 'new' destination needs further accommodation provision if it is to become a clear destination in its own right. To this end the planned provision of a major golf resort by a local developer is to be welcomed, with the possibility of a new hotel in Lisburn Historic Quarter. New boutique hotels, guest houses and B&Bs in and around Hillsborough will add yet another dimension and help retain more visitor expenditure in the area.	Entirely dependent on private sector investment but each of these projects could be achieved within five-seven years.
Down Royal Race Course	Down Royal provides a counter balance to the above elements as the leading horse racing destination in Northern Ireland. The opening up of the area and the growth of the 'destination' will help it underpin its success to date.	Potential to enhance and grow over the course of the coming twenty years.
Events	The creation of new events will be linked to Hillsborough Castle & Gardens by and large. Care must be taken not to invest significantly if benefits will accrue to other council areas.	New Hillsborough linked events in next 3 years.
Maze Long Kesh and a new National Museum	Here is a development with some parts already achieving great success such as the hosting of the Balmoral Show; the Eikon exhibition centre, doubling in size to become the largest exhibition Centre in Ireland. The outstanding Ulster Aviation Society collection, seeking museum status will complement the real possibility of a new collaboration with National Museums NI, outlined in 6.5 above, being	Staged delivery over three to eight years could deliver transformational change to the City.

	<p>developed which could deliver an international standard project and major tourism attractor.</p> <p>With a new access road being developed by LCCC and MLK in a ground-breaking approach to road development, the potential of this site could be achieved in a relatively short time period.</p>	
Sprucefield Shopping	<p>This shopping complex with its twin elements and possible future potential is already a magnet for cross border shoppers and again it can help inspire longer stays and more exploration.</p>	<p>Existing shopping destination with growth opportunities over twenty years.</p>
Lagan Regional Park and Navigation	<p>Although the longer-term concept of linking Lisburn to Lough Neagh may be some years away, new developments around Navigation House, near Sprucefield, will provide another must see attraction – the only one of its type in Ireland. Longer term ambitions would have a remarkable transformational effect.</p>	<p>Delivered in four five-year stages the Lagan Valley Regional Park and Navigation will link Belfast Harbour with Lough Neagh.</p>

This aspirational vision of a new destination is highly recommended to LCCC as it fits in well with the growth plans for West Lisburn and the wider community plans. It will also add a further dimension to the Northern Ireland tourism product.

7. Marketing and Communications Priorities

7.1 Overview

Hillsborough will grow to be the main destination in the City area for the next five years. with potential City Centre Arts in Lisburn Historic Quarter; the Lagan Navigation at Navigation House in Lisburn; and MLK with the Balmoral Show, Eikon Centre and Ulster Aviation Society collection in Lisburn West beginning to emerge as the key growth points for tourism. If the strategy can be made to stay on course for the next five years then the long-term integrated destination outlined in chapter 5 will visibly progress.

For practical purposes the branding, marketing and communication needs will remain the same during the next five years as they are today, to promote the area as a collection of boutique offerings:

- Hillsborough village, Castle and Gardens for heritage;
- Lisburn City Centre for Linen and the enhanced cultural offering in Lisburn Historic Quarter;
- Lisburn West / MLK for events and UAS collection;
- Down Royal for Horse Racing;
- Moira for foodies;

- Lagan Navigation at Navigation House as it emerges;
- Dundonald for the Ice Bowl, caravan park and family eateries;
- Carryduff for the Ivanhoe and the water-based activities;
- Dromara for Harry Ferguson and the Dromara Destroyers;
- Hilden for brewing and Drumbo for greyhound racing.

If this list grows too long then it becomes unwieldy and meaningless, indeed, prioritising the top five/six above feeds into the long-term strategy for an integrated destination and may make tactical sense. The construction is likely to mean that the Ice Bowl and Navigation House are unlikely to be fully operational until the last year or two, of the five-year period.

It is not possible to be certain when the long-term strategy for an integrated destination will become a reality on the ground, but it is important not to lose sight of the ambition. With a fair wind, the tourism elements could be in clear sight within ten years.

7.2 Branding

The aim at this stage is not to offer a single destination, so branding in the conventional sense is inappropriate.

The art with a disparate collection of places is to treat them as speciality boutique offerings, brought together with a common approach to design, whether online or on paper. Think of them as a collection of leaflets that are clearly related but with each having a distinctive quality and feel that reflects the place. Establishing a 'look' at this stage will also help in the transition to branding an integrated destination in the future. There is no need for overall logos and destination names at this stage.

During the five-year period, Hillsborough is and will remain the premier destination within the area. While Hillsborough should be clearly among the boutique offerings it will require some standout, first among equals so to speak. The approach to Hillsborough's brand values and branding are proposed in the Hillsborough tourism master plan 2015, and do not need to be rehearsed here again. Should Hillsborough be dubbed *Royal Hillsborough* its marketing would become even more high profile.

7.3 Marketing Plan

7.3.1 Digital marketing

Digital marketing is in many ways the driving force behind modern tourism marketing approaches. Tourism Ireland for example is now the fourth most followed destination in the world on Facebook with 4.1m followers. It is number three on You Tube with over 35m views per annum. Its website had over 19m visits in 2017. One issue highlighted is the diversity of channels available and the need to attract attention and cut through the 'noise'.

The illustration below shows their recommended approach and it is one appropriate for LCCC:

For the Digital Marketer's Crunch

- Reflect on priorities
- Plan & bundle
- Think now about data & automation

Data, data, data

- Look farther forward than normal for marketing
- Plan for your data needs

With Tourism Ireland:

- Plan with & around our audiences
- Think content, offers & partnership
- Engage with & use our audiences

Source: Tourism Ireland Marketing Plans 2017

The approach is based on setting priorities, taking time to plan and on establishing a clear focus on what digital marketing is aimed at. While this example is linked with Tourism Ireland this is not a necessity but is an excellent exemplar for what LCCC's digital approach needs to embrace.

In short digital marketing is not setting up a website and associated Twitter, Facebook and Instagram accounts etc and hoping for the best. The keyword is content – which does not happen randomly but through a planned and targeted process.

Visit Wales for example has a heavy focus on content management and of the 45 people working in tourism marketing 15 work in 'Brand Hubs' looking after content in each of their outward facing platforms e.g. Facebook. In the past Visit Wales used a rota system whereby individuals were asked to provide content on a certain day or week but now have full time Social Media staff. This is considered to allow better content planning, give a longer-term view and utilise events more effectively.

The main objective of a destination's digital marketing strategy is to drive interest in visiting the destination, and while there is often no shortage of good content, the challenge can be to select the best content and present it in the right way to best reach the target audience. The latest tablet and smartphone applications contain video, panoramas, interactive maps, background music, games, augmented reality based path finding and social media connection services such as Facebook and Twitter.

LCCC is taking firm steps in the planned use of digital marketing and a social media team has been set up from the VIC team. Content creation is taking place and for example an iPhone 7 acquired to allow photographic uploads to Instagram.

These are excellent first steps but there is a clear need to have a regular staff specialist managing this approach on a consistent basis. The need to focus on content continually has changed the face of marketing – it is not advertising agencies or script writers who will do this but LCCC staff who are aware of events, happenings, opportunities and tourism packages. They in turn link in with Visit Belfast, Tourism Northern Ireland and Tourism Ireland platforms.

It is strongly recommended that LCCC underpin its current digital marketing through the employment of a specialist in this field. This should be considered a priority. Digital marketing has the major advantage of being highly cost effective as a marketing method.

7.3.2 *Conventional marketing*

Traditional marketing and communication actions are generally embedded in a tourism marketing plan for a destination. Examples are:

Brochures & print materials	PR/publicity campaigns
Co-operative marketing	Event/festival marketing
Advertising – print, television, radio, outdoor	Brand development
DVD's	Direct mail
Travel trade support – fam trips, photographs, package concepts, partner search	Destination retail marketing

Ideally the related campaigns and initiatives in each instance should be undertaken jointly with a product or service provider, partnering with the council.

The elements of such campaigns can be expensive – for example television advertising – while print material is being overtaken by web-based content yet cannot be discarded completely.

For LCCC at present there are a number of marketing campaigns undertaken or being developed:

- ✓ Integrated Marketing Campaign – this is a £150k campaign aimed at developing footfall in Lisburn City which focused on Spring, Summer, Halloween and Christmas. It is now being focused on Visit & Shop. It uses a mixture of television, radio, poster, online and press. This campaign and budget is not controlled by the tourism team;
- ✓ Event Promotion – these are targeted campaigns linked to key events such as Balmoral Show, speciality food fair, pipe band championships etc;
- ✓ Hillsborough Masterplan Development – this new funding will ensure follow up to the Masterplan and include brand development, website development and a new marketing focus linked to HRP;
- ✓ Participation in partner campaigns and promotions – with TNI, TI and VB – this includes famtrips for travel trade and journalists as well as external tour operators and agents. With Hillsborough’s development, this will become increasingly important in the four-year period.

It is understandable that the council places a major focus on promoting the usage of Lisburn City Centre notably for shopping and associated events. A new Hillsborough focus will have greater impact on international tourism but as recognised earlier this has limitations on economic impact through a lack of tourist accommodation. A balanced approach therefore to tourism promotion and overall economic development objectives in marketing priorities makes sense.

7.3.3 *Market Segments*

Market segmentation is a technique to make the most efficient use of marketing budgets through carefully targeted approaches to those most likely to respond positively to a marketing

message. It is generally accepted that it is best to act in harmony with national segmentation – sharing benefit – rather than trying to plough a lonely furrow. This is one reason why partnership in marketing is useful.

Tourism NI's focus is on the following segments: *Culturally Curious, Social Energisers, Great Escapers, Golf, Screen Tourism, Cruises, Conferences & Incentives*. The *Mature Cosmopolitan's* that Tourism Ireland targets could be added as potential Hillsborough visitors. Golf and screen tourism are probably the only two segments that Lisburn should avoid but all the others are valid with Cruises and Conference & Incentive particularly apt for Hillsborough Castle.

In the domestic market or day visitor market a different approach is required.

7.3.4 Relationship with Visit Belfast

LCCC has had a relationship with Visit Belfast for some time and is a member of its Belfast Plus programme. This is a commercial relationship and LCCC receives agreed racking of materials and a special Belfast Plus brochure. In the total context of the income of Visit Belfast the contribution of LCCC is not large -some £30k – while Belfast City Council contributes some £1.3m. Should LCCC perhaps treble its contribution it could obtain a seat on the Board of VB and thereby help to steer its direction overall.

Within our workshop, industry on-line survey and through consultations with business owners it was made very clear to us that those located in the Dundonald - Castlereagh area considered the relationship with VB as absolutely essential to their businesses. VB is a membership organisation and most hotels and attractions in that area are themselves members. They believe LCCC should also make a commitment to VB.

In a similar vein HRP at Hillsborough is working closely with VB in relation to cruise ship tours and travel trade relationships. For their target of 200k visitors per annum to be achieved the large Belfast visitor market is an essential to them as is VB's ability to market worldwide with Tourism Ireland.

Is short the relationship with VB is something that is an essential tool in marketing the jewels of the area and the concept of deepening the relationship could be explored.

However, the best approach to doing so requires a fundamental review of what is being provided for the funds provided by LCCC. For example, a major increase in funding by LCCC may make little difference to what is achieved beyond a dedicated resource in Belfast Welcome Centre or a higher profile on the website and social media. The concept of providing a level of funding to guarantee a seat on the VB Board is of interest but in effect may achieve little.

7.3.4 Relationship with Lough Neagh Marketing

There is benefit to be gained from the Council working with Lough Neagh partnership and its marketing arm with its website Lough Neagh Tours. The focus will largely be on Moira and food related tours and this will be a sensible focus at modest cost.

7.3.5 Public Relations

There will be many opportunities for positive PR during the next five years or so and this will need to be carefully stage-managed and co-ordinated with partners. It will be necessary to prepare a PR plan for each year. PR is often used for events but the main steps in developing the integrated destination should be pro-actively and positively covered, for example; building a narrative about the development of the Arts in Lisburn Historic Quarter; the decision making

and development for museum developments. There should be good stories week on week throughout the coming years and they should be used to reinforce and nurture the vision.

7.4 Conclusions

Our recommendations in relation to marketing and communications generally reinforce the line which the council is currently taking. There is no case for attempting to develop a tourism brand for the Lisburn Castlereagh area – it will not fit into a Northern Ireland regional brand hierarchy, would attempt to force an unnatural tourism destination to emerge from a hybrid council area and would be a wasted source of funds.

Instead the concept of utilising the tourism strengths of the area as key marketing icons – mini - destinations – is both appropriate and affordable. It links well into the partnership with Visit Belfast and can harmonise with the TNI and TI approach to international marketing.

This coupled with the effective use of e-marketing and social media will help position the tourism assets of the area in the shop window where results can be achieved.

Marketing of Hillsborough Palace and Gardens will get fully under way in the next 12-18 months. LCCC must set the context for this in tourism terms and hence a new brand, website and suite of collateral materials helps HRP to achieve its key targets.

As new products develop in West Lisburn and MLK the council's marketing role will take on increasing significance as the area develops into a major tourism player.

8. Destination Management

8.1 Concept

Destination management is a term that has been widely used in tourism in recent years. Destination Management Organisations (DMO's) have been developed across various countries. Their issue has been what exactly is meant by a DMO and what real powers could they have. Tourism is one of the responsibilities of local government – one of a wide spectrum of needs in an area. The concept of a DMO as originally conceived involved managing a destination in a way most beneficial to visitors – this may have covered roads and transport, opening hours of public amenities as well as marketing and services.

The original Destination Management concept was in some ways unworkable as so many bodies had a say in the particular needs and requirements of a destination – many of which had a primary focus on residents and not simply on visitors. In Northern Ireland, the idea of a stand-alone Destination Management Organisation was never credible as local authorities had limited powers and many central organisations impact on the community overall. Co-ordination between local government and central bodies became the only workable approach even if flawed due to competing priorities and often as now budgets.

The World Tourism Organisation (WTO) defined destination management as follows¹¹:

'Destination management calls for a coalition of many organisations and interests working towards a common goal. The Destination Management Organisation's role should be to lead and coordinate activities under a coherent strategy. They do not control the activities of their partners but bring together resources and expertise and a degree of independence and

¹¹ WTO – A Practical Guide to Tourism Destination Management 2007

objectivity to lead the way forward. It follows that DMOs must develop a high level of skill in developing and managing partnerships’.

This concept of managing partnerships remains at the heart of any workable model.

Of late the term DMO has more widely transformed to a Destination Marketing Organisation – in some destinations known as a convention and visitors’ bureau.

8.2 Hillsborough Experience

Following the completion of the Hillsborough Tourism Masterplan the Council implemented many measures within it to assist in maximising the major investment by Historic Royal Palaces in the Castle and Grounds. This approach which involves a village co-ordinating committee and active work by the council in public realm and developing the attraction of the Forest is indeed an example of Destination Management. Further work on a website is due to begin shortly. Negotiations on the Visitor Information Centre’s location in the Courthouse are ongoing at this time again illustrating an element of Destination Management.

The question here is whether this model is relevant or even possible for the whole council area.

8.3 Pragmatic Approach

For LCCC area there are issues that impact on the ability to actively manage the destination. These include the ability of the council to act effectively on a number of areas that impact tourism. For example, transport is outwith the council’s hands and private sector investment can only be influenced to some extent. Equally there is a need for a total council overview of all aspects of life and business impacting the community. Tourism may not always be the number one priority – alternative industrial or business opportunities coupled with the leisure and quality of life needs of residents may take priority.

However, the council is in effect undertaking destination management in a proactive way now.

Examples are:

- ✓ Seeking an hotel investor on a dedicated site in Lisburn City Centre;
- ✓ Implementation of Hillsborough Tourism Masterplan;
- ✓ Hillsborough Forest development;
- ✓ Public realm improvements;
- ✓ Road project for MLK.

These are in addition to the ‘normal’ promotion of tourism, provision of visitor information services and industry leadership and skills development.

This pragmatic approach is a good example of destination management and is appropriate for the challenges ahead.

8.4 Visitor Servicing

Visitor servicing is an important activity by a council under its tourism remit. While the usage of Tourist Information Centres (or Visitor Information Centres in LCCC area) worldwide has been decreasing because of the dramatic growth of on-line information and visitor’s habits of researching on-line in advance of a visit, nevertheless they add value to the visitor experience and at a local level can greatly enhance the enjoyment and depth of a destination. This in turn can add to length of stay and hence visitor spend.

While most visitors will have booked accommodation before arrival their daily schedules are unlikely to be filled in and so an efficient VIC advisor can paint a picture of things to experience which no website can replicate. LCCC's commitment to its VICs and their staff is mirrored in the high regard in which the industry holds them – as clearly illustrated in the tourism industry survey undertaken and one to one consultations as part of this strategy development process.

The council spends nearly £0.5m on visitor servicing with its two VIC's in Hillsborough and Lisburn. The Council's current objective for the VICs is:

“to provide a first-class service to visitors and locals including accommodation booking, bureau de change, gift and souvenir centre, free literature, advice on tours and assistance with genealogy”. In addition, the staff provide on a rota basis content feed for Twitter, Facebook and What's On.

Current VIC's

The location of a VIC is critically important. In Lisburn, it is in Lisburn Square at the centre of the shopping area while in Hillsborough it is located in the Courthouse – which HRP is taking over to use as its entrance to the Palace for some two years. Whatever the outcome it is our strong recommendation that a VIC remains centrally located in Hillsborough because of the 200k plus visitors who will be generated by visits to the Castle and Gardens from 2019 onwards. A good VIC operation should assist these visitors, many international and first time, in discovering more about the area.

Additional VIC's & Information Systems

There is no VIC in the 'old' Castlereagh element of the council area. It would be difficult to justify setting up a new VIC there either at the Ice-bowl or at Forestside. While these are heavily trafficked sites there are few visitors who are tourists and who require information beyond wayfinding - staffing and running costs would be substantial challenges. The fact that the previous council had no VICs is significant.

There is a case however for an efficient modern electronic information system possible at both locations mentioned and also at the caravan park near the Ice-bowl.

One further location for information that should be considered is at the M1 Service Area Westbound. Somewhat perversely it has an electronic tourist information system provided by Visit Belfast which is promoting the city to those who have already left it. There is one link to another council area on it and that is to Armagh, Banbridge & Craigavon Council.

At the very least LCCC should have a link although the unit is not well sited and arguably users may already be fully committed to travel plans.

Visit Belfast

Lisburn Castlereagh is a partner of VB through the Belfast Plus programme as described in the marketing chapter. While this is a marketing linkage it also has TIC implications as there is information provided at the Belfast Welcome Centre through advisors or electronically and through brochure racking. A planned increase in commitment by LCCC will give additional information provision at both of Belfast's airports. Failte Ireland has caused some controversy by closing their two TIC's at Dublin airport because of so much pre-planning by visitors.

While many visitors do plan their visit in advance in detail there appears to be strong usage of the TIC facility at each airport. This may be something of a Northern Ireland factor at play and the council should monitor carefully the results of funding this airport presence.

8.6 Engaging the Business Community

The community and business engagement suggested for Hillsborough in the Hillsborough Tourism Master Plan would also be applicable to Moira and the other smaller towns and villages. Their desire to commit their community to tourism will also be a measure of their desire to secure the environmental, social and economic benefits that arise. It is clear that the Hillsborough community has the people and the will to make things happen. Only time will tell if others have the same commitment.

The recommendations that were made for Hillsborough remain broadly applicable for the larger area covered by this strategy. However, the City Centre tends to be dominated by businesses, public bodies and Not-for-Profits. The challenge is to make these organisations effective and sympathetic to the tourism ethos. Much has been said about the inability of many small businesses to deliver excellent services, from the moment potential customers go online to their welcome and nurturing their stay through to their departure. Tourism NI recognises this issue, which will be even more important as tourism relies increasingly on the private sector. Delivering this strategy depends on collaboration and on each sector playing their part, for example:

- The R-Space Gallery is playing a leadership role in the delivery of the Linen Biennale but it needs commitment and support from the public and private sectors to make this festival a success;
- Finding and securing crafts people and bookshop owners to take up empty premises on Bridge Street requires the Council, the property owners and the potential proprietors acting together to achieve a shared goal so that all benefit.

These ideas and approaches are not unique but at the outset they will be necessary to achieve a high quality and successful outcome for Lisburn Historic Quarter. Bringing groups of people together to help find the best solutions also has the benefit of engaging everyone at one time or another in the way forward. People are then more likely to buy into the strategy and are more likely to be actively engaged and committed to the future.

There will be a growing need for such business fora that meet regularly with a commitment to environment, heritage and tourism high on their agenda.

The wider community of residents and business people can provide valuable support by training to become ambassadors for the City Centre. As the numbers visiting the City grow the outcome will be a more knowledgeable group of people to act as greeters and to guide tours in and around the City Centre.

8.7 Training and learning

In this respect, the needs in the City and the wider area are broadly similar to Hillsborough. With all types of business, and the wider community and public sector needing access to training programmes and mentoring. The effective use of digital technologies is high on the list, particularly for small organisations and groups:

- A bespoke training and support programme in key digital technologies that align with business community needs, such as booking systems for accommodation and tourism

services, open to tourism SMEs and LCCC employees, including a series of training workshops especially tailored to smaller scale industry partners in the area; and

- The same training and support programmes could also be tailored and made available to local community groups and individuals who participate in organising events and activities in the area and support the wider promotion of tourism by volunteering to update websites, Facebook, Twitter and Instagram feeds for pre- and post- visit guests.

The same principles apply to those who will have direct contact with visitors when they arrive in the City Centre and surrounding area. They will require:

- Welcome Host or World Host training for anyone (businesses and community members alike) who wishes to act formally or informally as a greeter in the village, making visitors welcome and encouraging everyone to care for *their* guests;
- Volunteers will be needed in large numbers at major events, to support permanent staff at the visitor centre in all aspects of their work, and participating or performing at an event. Supporting, briefing and training them to fulfil their roles perfectly ensures a professional delivery on the day; and
- Developing an Ambassador Programme for those interested in becoming more informed hosts and those who would like the opportunity to become greeters and/or tour guides in the City Centre and surrounding small towns and villages. Tailored training courses are available.

Businesses need advice and support as they respond to the increased demands of growth:

- DAERA, Invest NI and Tourism NI run various programmes to support businesses, including mentoring for existing and start-up businesses; and
- Invest NI for example offer mentoring and training programmes for social enterprises.

Staying abreast of what is happening in the world beyond Lisburn Castlereagh cannot be left to chance so we suggest that regular learning journeys are organised for the businesses and the community. For example, a well-planned two-night visit to Totnes and adjacent Dartington in Devon would enable the City and business community to learn more about, for example, Transition Towns, the School for Social Entrepreneurs and supporting local businesses. Indeed, it would enable the community and businesses to learn more about the benefits of being self-sufficient.

Most of all the communities and the businesses need exemplary support. Their energy will deliver economic development, improved quality of environment, increased civic pride and reputation as a place to live and invest, for the City Centre and also for the surrounding area. They will help to earn that reputation around the world as well as in GB and Ireland.

8.8 Delivery

It is well understood that the new structures and reorganisations of LCCC are still taking place and that challenges remain in control of numbers of posts, relocation of staff and all the problems associated with a merger of two bodies.

The tourism unit of LCCC is small and will be stretched to implement the recommendations in this strategy as well as meet internal requirements relating to the council's priority projects now supervised by the Capital Projects Committee.

These projects are:

- ✓ Dundonald Ice Bowl rebuild;
- ✓ Knockmore Link;
- ✓ Hotel Development City Centre.

Three of these relate to tourism and all excluding Knockmore Link require tourism management input if they are to maximise economic benefits for the area.

8.9 Conclusions

Destination management is remarkably effective in Lisburn Castlereagh and there is little argument for establishing more procedures across the council area than currently exist. The council's overall plans take account of tourism and where special emphasis is needed such as in Hillsborough a local management system has been established. Clearly focused development policies coupled with consideration of both community and the wider economy all point in the right direction for tourism growth.

While some exciting changes will take place in the short term it is in the medium to long term that the current approach will bear even more fruit.

9. Action Plan

Delivery

A three-year action plan is presented here plus a short outline for future years which may extend past the five years of this strategy for tourism.

In a rapidly changing scenario it is best not to be prescriptive about the council's future actions in the medium/long term. Challenges such as the Belfast Region City Deal, an agreement over future uses of MLK, the potential of a National Museum site and the advancement of a Lisburn Historic Quarter will all require nimble footwork by LCCC and partners.

The strategy and its action plan will need reviewed and refreshed before the end of the first three years.

Content

The Action Plan is presented below in three sections: project and event development; marketing, digital marketing and community; and, training and management. Each covers the first three years.

Where possible full costings are indicated but often only outline or suggested costs can be illustrated as full accurate costings would require extensive planning work on each project.

Following the three-year action plan an outline action plan for the following years is presented in brief.

Achieving Targets

An Action Plan is an essential component of any strategy through its role in implementation of the strategy in a timely business-like manner.

However, LCCC does not work on its own in tourism and its actions will not necessarily bring about the desired level of tourism growth in visitor numbers and revenue. Its partners whether in the private, public or voluntary sector all need energised to provide investment, quality standards, effective marketing and product which the market requires. LCCC can set that example through leadership and key investments.

The council's action plan can help set the standard, unlock opportunities with partners and provide a marketing background that allows growth targets to be met.

This conundrum is faced by all public sector tourism agencies – would growth take place without our investments and efforts? The generally accepted answer is no it would not and that the necessary investment in tourism by the public sector helps establish a beneficial environment where desired tourism growth can be achieved.

9.1 THREE YEAR TOURISM ACTION PLAN – PROJECT & EVENT DEVELOPMENT

Table: 1 Project and Event Development

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
1.1	Hillsborough					
1.1.1	Implement the tourism action plan for Hillsborough, in particular the first phase of the master plan for Hillsborough Forest Park, the environmental improvement scheme, together with the annual events programme, community initiatives, farmers' market, the Shambles arts project and the marketing strategy.	2017-2020	Local, national & international visitors	LCCC, FSNI, HLF, DfC HRP, NIEA	Deliver phase 1 for Forest Park and entire EI scheme capital investment; commence events programme and community initiatives; ensure marketing strategy in place	Forest Park £4.5m EI scheme £1m
1.2	Accommodation Development					
1.2.1	City Centre Hotel Castle Street – see 1.3.4 below	2017-2018	Local, national & international visitors	LCCC, hotel developer/operator, and perhaps Invest NI	Lead to enhancing tourism bed-nights and contribute to evening economy	£2m
1.2.2	Lobby InvestNI & Dept for the Economy re 10-mile support zone	2017	Developers	LCCC	Lisburn city centre + becomes eligible for INI support	NA
1.2.3	Hillsborough Golf Resort – work with developer to encourage a high standard project	2018-21	Local, national & international visitors	Developer	Major golf resort including key	NA

Lisburn & Castlereagh Tourism Strategy 2018-2022

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
					hotel development	
1.2.4	Other Accommodation Development – ensure availability of land for hotel at locations across the area including ice-bowl, MLK and further afield.	2019+	Local, national & international visitors	Developer, LCCC	Chain hotels at low-medium cost to gain overnights for area.	NA
1.2.5	B&B Provision – continue working with TNI to encourage further growth of B&Bs across the area - workshops	2018/20	Local, national & international visitors	LCCC, TNI	Additional 10 B&Bs across LCCC area	NA
1.3	Lisburn Historic Quarter					
1.3.1	Support the Linen Biennale led by R-Space Gallery	2018 and every two years thereafter	Local, national & international participants and visitors	Private sector, LCCC, Arts Council NI, CraftsNI, NITB, InvestNI	Inspirational biennial festival for the past, present and future of linen and creativity	<£50k contribution for 2018
1.3.2	Support R-Space Gallery at the Linen Rooms HLF grant application to restore their premises on Castle Street	2018	Local, national & international visitors	LCCC and HLF	Release significant potential of the R-Space Gallery	No direct financial contribution, but staff time with support and guidance
1.3.3	Investigate the potential for an enhanced arts and culture offering in Lisburn Historic Quarter and seek partnerships for delivery.	2018-2020	Local, national & international visitors	LCCC with private and non-profit sector, Arts Council NI, Crafts NI, Invest NI	Re-generation of day and evening economy, focused around Market Square	TBC
1.3.4	Secure the development of a hotel on Castle Street on a site adjacent to Castle Gardens.	2017-2018	Local, national & international visitors	LCCC, hotel developer/operator.	Lead to enhancing tourism bed-	£2m

Lisburn & Castlereagh Tourism Strategy 2018-2022

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
					nights and contribute to evening economy	
1.3.5	Following the Council's Museums Review consider options relating to the more effective delivery of the Linen Centre and Lisburn Museum including an enhanced cultural offering and the possible relocation of Lisburn VIC and radical solutions as appropriate.	2018-2020	Local, national & international visitors	LCCC internal, with grants possibly from Arts Council, Craft Ni and HLF	Lead to enhancing the scale, performance and quality of the Linen Centre and Museum	£25K for options planning
1.4	Lagan Navigation					
1.4.1	Support the Lagan Navigation Trust to complete Phase 1 of their programme of work for the Discover Waterways Lisburn Project outlined in section 6.3 in this strategy	2018-2021	Local, national & international visitors	Lagan Navigation Trust, TNI with support from LCCC	Completion of the next stage opening of Lagan Navigation and extension of the Lagan Valley Regional Park	No direct financial contribution, but staff time offering support and guidance
1.5	Lisburn West & Maze Long Kesh					
1.5.1	Prepare the master plan and design briefs for the West Lisburn Strategic Framework city expansion	2018-2019	Developers and government departments and agencies	LCCC, MLK, (SIB?), DfC and Invest NI	Laying groundwork for long term investment and	£75K

Lisburn & Castlereagh Tourism Strategy 2018-2022

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
					for attracting investment	
1.5.2	Plan and design development of the Knockmore Link.	2018-2020	LCCC, MLK, Transport NI	LCCC	Opening up opportunities for medium/long term investment in MLK and Lisburn West	TBC
1.5.3	Continue to work with MLK, particularly on the Balmoral site so and with UAS to achieve greater access to their collection.	2018-2021 short / medium term	Local, national & international visitors	MLK, RUAS, UAS and others as appropriate with LCCC on a case by case as appropriate	Continued development of MLK site with a strong focus on tourism orientated development and events	Contribution to Master planning Ca £25k
1.6	National Museum Concept					
1.6.1	Initial agreement will be required on the formation of partnerships, MOUs and so on; and explore future relationships with other interested parties such as Ulster Aviation Society, Translink, Transport NI and the Lagan Navigation Trust	2019 +	Local, national & international visitors	National Museums NI, Department for Communities, LCCC, Maze Long Kesh; and others as appropriate	Investigating the possibility of creating a new national Museum at MLK	N/A
1.6.2	Prepare an options appraisal and feasibility study including a costed master plan and business plan, including logistics of relocating collections and objects to MLK.	2020 +	Local, national & international visitors	National Museums NI, Department for Communities, LCCC, Maze Long Kesh; and others as appropriate	Investigating the possibility of creating a new national Museum at MLK	Say £75K

Lisburn & Castlereagh Tourism Strategy 2018-2022

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
1.7	Dundonald					
1.7.1	Implement the renewal plans for Dundonald Ice-Bowl	2017-2020 short/medium term	Local and national	LCCC	A refreshed Ice Bowl fit for the 21 st Century	£50m
1.8	Small Towns and Villages					
1.8.1	Implement a light-touch environmental improvement and painting scheme in all villages listed in this strategy	2019-2020	Local and National	LCCC	Low key environmental improvement to the named villages	£20k per village support
1.8.2	Moira & Hillsborough should continue to be developed as a significant food experience destination within the City in the context of Northern Ireland	On-going	Local, national & international visitors	LCCC	Continue to position Moira as a food destination	£5k incentive
1.8.3	Moira should be subject to a full public realm improvement scheme that also sets out to reduce the impact of the traffic on the environment of the village.	2019-2021	Local, national & international visitors	LCCC, DfC, Transport NI	Transform the appearance and quality of experience on Moira's High Street	£50k Plan
1.8.4	A townscape review should be conducted to establish whether Moira would be eligible for an HLF Townscape Heritage project or equivalent.	2018 - on	Local, national & international visitors	LCCC, HLF	Transform the appearance and quality of Moira's Heritage experience for visitors	£1m +
1.9	Water Sports Carryduff					
1.9.1	Encourage developer of Carryduff Water Sports project – assist in breaking any log jams- subject to planning consents	2018+	Local & national visitors	Developer, LCCC	To provide a high-quality experience at	NA

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
					disused reservoir in excellent location.	
1.10	Belfast Region City Deal					
1.10.1	Work with council partners to secure tourism projects of significance from the proposed City Deal.	2018-2020	International visitors	All partner councils	Tourism projects that will add to GVA of region	Not Yet Known

9.2 THREE YEAR TOURISM ACTION PLAN – MARKETING, DIGITAL MARKETING & COMMUNICATIONS

Table: 2 Marketing, Digital Marketing and Communications

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
2.1	Hillsborough Marketing Investment					
2.1.1	Ensure that the work on Hillsborough Brand Development, Website & Social media Development is linked carefully to the Lisburn Castlereagh approach as well as the effectiveness of new Hillsborough Brand	2018	Local, national & international visitors	LCCC and Consultants	Spreading Hillsborough assets linked clearly and logically with overall area	Ca £50k
2.2	Digital Marketing					
2.2.1	Review of current web & social media provision following Hillsborough project completion	2019	LCCC, Industry	LCCC	Best practise website and social media approaches as being developed for Hillsborough	£10k
2.3	Brand					
2.3.1	Continuous internal review of brand identity – operating within the suite of key brands within the area – Hillsborough, Balmoral Show, Ulster Grand Prix, Shopping complexes	2018-19	Local, national & international visitors	LCCC – industry partners	Ongoing understanding of significance of not developing a major LCCC area brand	NA
2.3.2	Other LCCC advertising – ensure that seasonal advertising for shopping, events etc has a tourism spin off where possible	2018+	Local & national visitors	LCCC	Achieving tourism value where possible across all campaigns.	NA

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Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
2.4	Conventional Marketing					
2.4.1	Brochures & print material – reduced in print runs in recent years correctly – but essential element for VIC’s, trade fairs etc. To reflect new Hillsborough identity	2018	Local, national & international visitors	LCCC	Up to date suite of materials which are critically reviewed each year	£20k
2.4.2	Co-operative marketing – working with partners inc VB and TNI where appropriate – or with HRP & private sector	2018/9	Local, national & international visitors	LCCC, partners	Strong linkages created that benefit the whole area	£20k
2.4.3	Advertising - priority for joint campaigns with HRP – plus support material in What’s On type publications and potentially airports	2018/9	Local, national & international visitors	LCCC, partners	High profile for area through HRP investment	£40k
2.4.4	Travel trade support – back up to higher profile from HRP etc – support material – trade fairs and ‘fam trips’	2018/19	Local, national & international visitors	LCCC, partners	To build on high level of trade interest from HRP	£8k
2.4.5	Domestic – in association with Hillsborough initiatives expand coverage to wider area through events, consumer shows, pilot merchandising, club promotions	2018/19	Local visitors	LCCC, partners	To build on Hillsborough coverage locally	£8k
2.4.6	Business & incentive tourism – utilise Hillsborough as basis of incentive travel working with VB or TNI in international market	2018	National & International Business Visitors	LCCC, VB, TNI	New business tourism demand stimulated	VB contract – TNI partnership

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
2.5	Partners - Visit Belfast- Lough Neagh					
2.5.1	Reassess relationship with VB to maximise value to LCCC – this may involve an increased fee to ensure appropriate services and placement of product, materials etc. In partnership with industry notably from Castlereagh area & HRP	2018	Product providers & partners	LCCC, VB, partners	Achieving maximum return from investment	NA
2.5.2	Work with Lough Neagh Partnership to achieve marketing initiatives focused on Moira and food.	2018-20	Other councils	LCCC, LNP	New focus on food tours	£5k
2.6	Public Relations					
2.6.1	Annual PR plan – which maximises the impact from new developments coming on stream – e.g. Hillsborough Castle, Canal Locks, MLK	2018+	Local, national & international visitors	LCCC, TNI, TI	High profile media coverage of new developments both at home and abroad	£15k

9.3 THREE YEAR TOURISM ACTION PLAN – DESTINATION MANAGEMENT & TRAINING

Table: 3 Destination Management and Training

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
3.1	Approach & Delivery					
3.1.1	Destination Management – there is no clear case for introducing an industry body for the LCCC area as was the case in Hillsborough. The scale and diversity of the area would make this unviable. Instead it is recommended that a once a year industry workshop is established to inform, get feedback and inspire with news of new developments etc	2018 +	Industry	LCCC	To assist in a joined-up industry with a greater focus on the LCCC area rather than Belfast.	£2k
3.2	Visitor Servicing					
3.2.1	Current VIC's are rated highly by the industry and it is essential that their work continues – notably in Hillsborough where there is uncertainty with HRP over the Court House location. If negotiations cannot be concluded satisfactorily a new nearby location must be found.	2018+	Local, national & international visitors	LCCC	Ability to inspire visitors to explore more and to point to overnight stays in B&B's where accommodation supply is limited.	To be negotiated
3.2.2	Additional provision – it is not possible to justify any additional VIC's. However electronic provision at locations such as Dundonald and Forestside should be considered.	2018	Local, national & international visitors	LCCC	Further tourist information provision in an effective format.	TBA

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
	Provision at the West bound Apple Green M1 service area also needs serious investigation.					
3.3	Business Community					
3.3.1	Integrating the business community across the LCCC area is a goal to be pursued. The challenge relates to the Castlereagh private sector being almost entirely Belfast focused. The annual workshop referenced at 3.1.1 above is a means to achieve this integration. It is essential to get major suppliers involved.	2018 +	Industry	LCCC	To assist in a joined-up industry with a greater focus on the LCCC area rather than Belfast.	£2k
3.3.2	Lisburn Historic Quarter Focus – the objective here is to inspire those currently in city centre in business to buy into the tourism vision. A combined city centre management and tourism workshop on a regular basis is recommended.	2018+	Lisburn city centre industry	LCCC	To inspire the tourism businesses and support services in city centre	£2k
3.4	Training & Learning					
3.4.1	Substantial training & learning recommendations were made in relation to Hillsborough and many of these are appropriate for the whole area: <ul style="list-style-type: none"> ➤ Digital Training programme for business ➤ Digital Training for Community Groups ➤ Welcome Host training ➤ Business Start Up 	2018/20	Local businesses and community, prospective entrepreneurs	LCCC, INI, EU Programmes while available	Better equipped businesses and communities couple with new entrepreneurs in tourism	£30k plus external support

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Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs	Indicative Budget for LCCC £
3.5	Performance Measurement					
3.5.1	Build hotel relationships to seek agreement to occupancy rates provision or to get contribution to NISRA occupancy survey. Carry out telephone survey of all accommodation on a monthly basis.	2018 +	Industry members	LCCC	Occupancy figures for LCCC area	£2k
3.5.2	Review the methodology of industry performance research for LCCC.	2018	Supplier	LCCC	Confidence levels of data	£2k

9.4 TOURISM ACTION PLAN – LONGER RANGE

Table: 1 Project and Event Development

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs
4.1	Belfast Region City Deal				
4.1.1	Progress the initiative over a five year+ period and deliver new tourism related projects in LCCC area	2020 +	International visitors	LCCC, Council partners, private sector partners	Projects that contribute to GVA across region and Northern Ireland
4.2	Hillsborough				
4.2.1	Maintain the pace of investment following HRP's projects and underpin Hillsborough as a must visit destination	2020+	International visitors and all island	LCCC & partners	A major tourism hub which will encourage private sector investment notably in accommodation
4.3	Accommodation				
4.3.1	If necessary continue lobbying InvestNI; promote opportunities at Hillsborough, Lisburn Historic Quarter, MLK and Dundonald	2020+	Overnight visitors for retention in area	LCCC & partners	Growth of accommodation sector to retain economic impact from major attractions & events
4.4	Lisburn Historic Quarter				
4.4.1	Keep the pressure on delivering a co-ordinated plan and delivery strategy to achieve a desirable Quarter with appeal including night-time	2020+	Local, regional and international visitors	LCCC & partners	An appealing and attractive area with year-round potential
4.4.2	Review the concept of a council led arts centre in the Historic Quarter and potential for further museum improvement and change.	2020+	Local, regional and international visitors	LCCC & partners	Addition to year-round appeal
4.5	Maze Long Kesh				
4.5.1	Work with partners to achieve agreement on site usages and future developments – many of which can enhance tourism.	2020+	Local, regional and international visitors	LCCC & partners	Additional attractions and access

Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs
4.6	Potential National Museum				
4.6.1	Continue developing relationship with NMNI to assist in achieving a way forward to deliver a major museum at MLK	2020+	International visitors	NMNI, MLK, LCCC & partners	Another International-standard attraction at MLK
4.7	Dundonald				
4.7.1	As completion of renewed ice bowl approaches consider the provision of additional infrastructure including accommodation as well as caravan/camp site.	2021+	All island visitors	LCCC & partners	To enhance Dundonald as a tourism destination
4.8	Marketing				
4.8.1	Review the success of marketing in light of Hillsborough investment coming fully on stream at Castle & Gardens including partnerships.	2020+	Market segments, add-ons to Castle visitors etc	LCCC & HRP	Marketing approach revised
4.8.2	Review marketing of shopping destinations and related segments in view of Brexit	2019+	Cross border visitors	LCCC & partners	Refocused target markets and approach
4.8.3	Review brand effectiveness & need in light of TNI branding for Northern Ireland	2020+	ROI & international	LCCC, TNI	Changes made if necessary
4.8.4	Review partnerships with VB & Lough Neagh to assess effectiveness and need for change	2020+	Partners	LCCC, VB, LNP	Changes made if necessary
4.9	Destination Management & Training				
4.9.1	Review the Hillsborough situation relating to the major growth in numbers to the Castle and the ability of VIC to service them, following settlement or otherwise with HRP re Court House.	2020+	LCCC, HRP, Industry	LCCC	Establishment of firm evidence re need after major growth in Castle numbers.
4.9.2	Consider need for further industry digital training as skills enhancement need gathers pace.	2020+	LCCC & industry partners	LCCC, TNI,	Ensuring that necessary skills are updated regularly
4.10	Strategy Review				

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Ref:	Description	Time	Target Group(s)	Delivery	Key Outputs
4.10.1	Mid Term Review the progress of the tourism strategy in 2020 to assess need for any directional changes in the light of Hillsborough completion, Brexit and publication of NI Strategy	2020	LCCC, TNI	LCCC	Changes in strategy if necessary
4.10.2	Review – end of strategy review	2022	LCCC, TNI	LCCC	Evaluation of outputs and effectiveness, to provide data for successor strategy.