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Recreational, Tourism & Commercial Product Identification Study for the Lower Bann



Contents

1	Introduction, Background and Terms of Reference	1
1.1	Background	1
1.2	Terms of Reference	2
2	Overview of the Lower Bann	4
3	Policy Context	5
3.1	Lower Bann Navigation and the Waterway	5
3.2	Recreation	6
3.3	Tourism.....	7
3.4	Planning Context	9
3.5	Environment	15
3.6	Consumer Technology	17
4	Recreation and Tourism Market Intelligence	19
4.1	Waterways Market Analysis	19
4.2	Visitor Market Segments	20
4.3	Outdoor and Activity Tourism Market Trends	22
5	Recreation and Tourism Usage and Participation	24
6	Identifying Sensitivities Along the Lower Bann	30
6.1	Existing Landscape Character Areas - Northern Ireland Regional Landscape Character Assessment (2015)	30
6.2	Visual Landscape Categories for the Lower Bann	32
6.3	Natural and Built Environment Sensitivities	40
6.4	Assessing Natural and Built Environment Development Potential	47
6.5	Landscape and Environmental Sensitivities Overview	47
7	Recreation and Tourism Opportunities in the Lower Bann Corridor	52
7.1	The Lower Bann Blueway	52
7.2	Watersports and Angling.....	53
7.3	Tourism and Recreation Gateways and Hubs on the Lower Bann.....	53
7.4	Tourism and Recreation Significant Sites	55

8	Recreation and Tourism Opportunities in Lower Bann 5 Mile Corridor	68
8.1	Tourism Destinations	68
8.2	Tourism Strategies	69
8.3	Tourism Product Audit	73
9	Vision, Outcomes, Principles and Way Forward.....	76
9.1	Lower Bann Vision	76
9.2	Outcomes – What will success look like?	76
9.3	Key Principles.....	77
10	Action Plan	78
11	Next Steps and Monitoring	90
11.1	Next Steps	90
11.2	Monitoring and KPIs	90
11.4	Funding Opportunities.....	92

Volume 2 Appendices

Appendix 1:	Planning Context
Appendix 2:	Northern Ireland Regional Landscape Character Assessment Detail
Appendix 3:	Landscape Character Assessment Detail
Appendix 4:	Landscape Character Assessment Sensitivities and Principles for Accommodating New Development
Appendix 5:	Visual Landscape Character Assessment
Appendix 6:	Details of Ecological Designations Along the River Bann
Appendix 7:	Details of Built Heritage Designations Along the River Bann
Appendix 8:	Funding Opportunities
Appendix 9:	Sources (Literature review)
Appendix 10:	Tourism NI and Tourism Ireland Segmentation
Appendix 11:	Tourism Audit
Appendix 12:	Consultations

1 Introduction, Background and Terms of Reference

The Lower Bann River is navigable for 60km from Lough Neagh to the sea and is enjoyed by cruising boats, anglers, canoeists, water-skiers and many others. Located across four local authority areas, the Lower Bann River Corridor offers opportunities to enhance recreational and tourism activities, with potential to encourage or attract new commercial activity linked to leisure and visitation.

The combined team of BTS and Outdoor Recreation NI was commissioned to explore recreational, tourism and commercial opportunities in a 1 mile corridor along the length of the river and to further look at these opportunities in a wider 5 mile corridor as well as linkages to significant tourism facilities further afield.

The commission partners comprise:

- Waterways Ireland
- Antrim and Newtownabbey Borough Council
- Causeway Coast and Glens Borough Council
- Mid and East Antrim Borough Council
- Mid Ulster District Council
- The Honourable the Irish Society
- Sport NI
- Tourism Northern Ireland

Waterways Ireland is one of the two Navigation Authorities on the Lower Bann, managing 52km of navigation from Coleraine Town Bridge to Lough Neagh. The second is the Coleraine Harbour Commissioners, who manage the 8km of navigation from the sea at the Barmouth to the Town Bridge in Coleraine.

Waterways Ireland is a North/South Implementation Body, charged with the management, maintenance, development and restoration of the inland navigable waterway systems throughout the island of Ireland, principally for recreational purposes. The core mission of Waterways Ireland is: “to provide a high quality recreational amenity centred on the inland waterways in its care.”

Within this context, this Lower Bann assessment will fall into the suite of strategies and action plans covering all of the Waterways Ireland managed waterways systems.

1.1 Background

While the river is enjoyed by many recreational and sporting groups and users, it is subject to variable water levels and strength of flow, depending on whether the Rivers Agency needs to regulate water levels on Lough Neagh¹. The river drains out from Lough Neagh, the largest freshwater lake in Britain and Ireland, whose catchment extends to almost 5,000 sq. km, the equivalent of 43% of the land surface of NI. Users on the Lower Bann are affected by the management of these water levels and flows.

Overall, the history, built and natural heritage, environment, landscape setting and visual amenity are

¹ This issue is addressed in more detail in the report

rated highly by those who might know the river; but a substantive issue lies around the hidden nature of the Lower Bann as a destination and as a place in which to enjoy the countryside and undertake water and land based activities. While individual sites and facilities along the river may be attractive and well used (by recreational groups, for visitors etc.), the Lower Bann as a whole is not a readily identifiable destination.

Access on the water allows full length navigation, with weirs, locks and navigable canals adding interest, but walker or cyclist access along the full length of the river banks is impeded by fragmented routes on the river banks.

There are significant opportunities to build on the quality of the river and its setting to enhance its recreational and tourism significance, while ensuring that it provides a resource to local people and communities. Nationally, the significance of recreation and tourism can be summarised as follows:

- The health and wellbeing, social inclusion and cohesion benefits of enjoying the outdoors have been proven (for instance, through research undertaken by the Countryside Recreation Network and Outdoor Recreation NI)
- The economic value of recreation was attested to by Sheffield Hallam University who highlight over 3,500 jobs in NI in the outdoor recreation sector, which is worth £132m p.a. in consumer spending
- Tourism in NI, Ireland and globally is on a continuing ascendant, with its economic value assured; 2016 has been a record year for tourism to Ireland, with 8.8m visits, while in NI tourism has seen significant growth, with total tourism revenue increasing by 17.6% and overall trips by 13.71% since 2011

Locally, perhaps the fact that the Lower Bann is not yet a recognisable destination for visitors and recreational users lies in the wide range of administrative bodies that had, or have, responsibility for management and development on and near the river. The four local authorities whose areas the river runs through have each committed to tourism and tourism development. This study and action plan aims to provide a cohesive strategic development approach for the Lower Bann River Corridor, ensuring that there is an integrated, considered and sustainable development plan implemented across the steering group members and wider stakeholders for the benefit and well being of local communities and visitors.

1.2 Terms of Reference

Identifying what action to take to enhance recreational, tourism and commercial opportunities on the Lower Bann is dependent on establishing a vision and statement of ambition to guide future development.

The terms of reference comprise:

- Identify market led, innovative and sustainable recreational, tourism and commercial product development opportunities for the Lower Bann Corridor

- Review of existing users and facilities on the Lower Bann: identifying constraints and potential sites for product development (through a product audit, literature review, and review of demand and tourism/ recreation trends relevant to the Study Area)
- Production of an Action Plan, with responsibilities and timelines catalogued
- Mapping of factors impacting opportunities in the Lower Bann Corridor
- Identify potential funding sources to support and enable any of the partners to take forward the initiatives and actions identified by the study

Underpinning the study is the articulation of the opportunities for the Lower Bann and generating commitment from all agencies to these and to priorities amongst them.

The methodology adopted in the preparation of this study comprised consultation, desk research, mapping and market analyses.

2 Overview of the Lower Bann

The Lower Bann is the largest river in Northern Ireland, being 60km long and approximately 60m wide for most of its length. The Lower Bann leaves Lough Neagh at Toome, widens at Lough Beg and again at the estuary before it enters the Atlantic between Portstewart and Castlerock. The overall gradient of the river is modest; it drops 12.55m above OD Belfast from Lough Neagh to the sea at the Barmouth between the towns of Castlerock and Portstewart.

While the river is navigable along its full length, management of its drainage function results in fluctuating water levels and strength of flow, impacting many users on the water from time to time, especially in winter.

The Lower Bann plays a crucial role in draining 43% of NI (as well as part of the Republic of Ireland) and has major significance as a natural and built heritage and local amenity asset. The Lower Bann River Corridor is rich in wildlife, with Lough Beg and the estuary being particularly important for wildfowl, breeding and migratory birds, as a conduit for migrating eels and habitat for coarse and game fish species. The number of landscape and wildlife designated areas along the river and in the river corridor demonstrate its importance.

The built heritage of the Lower Bann is also significant, with 343 built heritage sites, of which 224 are directly related to the waterway. Waterways Ireland has a stake in 37 of them², 13 sites are listed and 20 are Scheduled Monuments. The Lower Bann has accommodated people from Mesolithic times, with sites and artefacts dating from pre-Christian times to the 2nd World War.

Lough Beg is 3km downstream of Toomebridge, where the Lower Bann widens into a rich natural habitat of remote wetland fringe landscape with flat pastures merging into shallow drumlins bounded by low woodland. Apart from the deeper navigation channel, the lake is generally about 2m deep³.

Further north, distinctive steep-sided sand and gravel hills; ridges and wooded slopes (between Portglenone and Movinagher) give way to a wider valley floor, with low-lying fields and an influx of local rivers (the Agivey, Aghadowey, Macosquin and Ballymoney rivers). Many of the fields have been enlarged to form extensive open flat pastures.

Between Ballylagan and Coleraine the valley narrows, with steep well-wooded sides taking over again, before the tidal estuary from Coleraine to the sea. Downstream from the town, where the estuary begins to widen, there are extensive sand dunes on both banks.

Coleraine Harbour is still commercially active, with a maintained dredged channel.

There are many recreational and sporting clubs located along the river, which is popular for many recreational activities such as sailing, canoeing, paddling, powerboating and water-skiing, as well as more casual activities like walking and cycling.

The Lower Bann runs through four local authority areas: Antrim and Newtownabbey, Causeway Coast and Glens, Mid and East Antrim Borough Councils and Mid Ulster Council.

² Source: Built Heritage Survey of the Lower Bann Waterway, December 2013

³ Source : <http://www.loughneagh.com/lowerbann.html>

3 Policy Context

3.1 Lower Bann Navigation and the Waterway

The Lower Bann is subject to management by three agencies:

- Waterways Ireland is one of the six North/South Implementation Bodies established under the British Irish Agreement in 1999; it manages, maintains, develops and promotes inland navigable waterways principally for recreational purposes
- Coleraine Harbour Commissioners manage 8km of navigation from the sea at the Barmouth to the Town Bridge in Coleraine
- The Rivers Agency's aim is to reduce the risk to life and damage to property from flooding from rivers and the sea and to undertake watercourse and coastal flood management in a sustainable manner. The Agency's vision is to manage flood risk to facilitate the social, economic and environmental development of Northern Ireland

Waterways Ireland's activities are catalogued under its Corporate Plan, 2013-2016, which is approved by the Department for Infrastructure⁴ in NI and the Department of Arts, Heritage Regional, Rural & Gaeltacht Affairs in Ireland.

Waterways Ireland is tasked to:

- 1 Manage and maintain the 1,000km of navigation in its care to provide safe, open and accessible public recreational space
- 2 Inspire more people to discover and enjoy recreational activities on the inland waterways, and to explore these rich environment and heritage attractions
- 3 Focus future development on unlocking opportunities to achieve recreational growth, and economic and social development
- 4 Re-organise and optimise the use of resources to deliver a high quality public service, and achieve budget efficiencies
- 5 Explore and develop opportunities to earn income to fund future investment in the inland waterways
- 6 Continue to develop Waterways Ireland as the respected and valued custodian of the inland waterways

Arguably, one of the biggest challenges for Lower Bann users is the rate of flow and water levels resulting from the management of water levels on Lough Neagh by the Rivers Agency. The water level on the Lower Bann is controlled by the Rivers Agency.

Water levels on Lough Neagh and flows in the Lower Bann are controlled by a system of sluice gates and weirs (Toome, Portna, near Kilrea, and The Cutts at Coleraine) put in place as a result of a number of drainage schemes. A system of locks makes it possible to navigate along the full length of the river.

In response to continuing pressure to alleviate flooding around Lough Neagh, the water level was lowered in the 1940s and 50s by adjusting the management regime of the sluice gates at Toome. The net effect of these drainage schemes was a lowering of the Lough Neagh water level by about 3m and a reduction in the natural range of high and low water levels.

⁴ Formerly the Department of Culture, Arts & Leisure

Water levels on Lough Neagh are prescribed through Lough Neagh (Levels) Schemes made under section 1 of the Lough Neagh & Lower Bann Drainage and Navigation Act (NI) 1955. The current Lough Neagh (Levels) Scheme 1955 specifies that the water levels of Lough Neagh should be maintained between 12.45m and 12.60m above ordnance datum Belfast as far as conditions of rainfall, wind and other natural causes allow.

The Rivers Agency's management of the sluice gates aims to:

- Maintain the level of Lough Neagh within the 15cm control range
- Maintain an adequate flow in the Lower Bann

With Lough Neagh draining c43% of NI, and with variable weather conditions, the net impact (especially at times of bad weather and in the winter months) of opening sluice gates is to increase water flows and levels on the Lower Bann. These variations impact the use of the river by recreational users, necessitating communication mechanisms to ensure that water users are alerted to changed levels, insofar as they impact the sport or activity (e.g. angling, boating, canoeing etc.) and maintain safety. The current arrangement is information on the Rivers Agency website which is changed daily subject to water levels and flows. Users of the river need to know where to look to find this information.

While abrupt changes in water level can cause difficulties for anglers and boaters, they also impact on fish movements and the Lough Beg grasslands, which can be re-flooded in spring, destroying the nests of breeding waders. Water level management also impacts throughout the Lough Neagh wetlands. For example, wetlands can be negatively affected by excessive droughts but damage can also be caused to ground and nesting birds by unseasonal floods. There are also implications for eel fishing, navigation and farming throughout the Lough Neagh catchment.

Water quality in rivers is classified using both chemical and biological monitoring techniques which are gathered at several points along the river by the Department of Agriculture, Environment and Rural Affairs. These show "good" and "high" quality from most recent studies⁵, but occasional agricultural chemical runoff into the river basin can reduce water quality from time to time. There is a need for closer cooperative working amongst agencies to reconcile the drainage, navigation and leisure functions on the Lower Bann.

3.2 Recreation

Recreational and outdoor activity can be defined in a number of ways and ranges from adrenaline fuelled and competitive sports, through to passive or soft activity, characterised by walks and strolls. Two substantive policy contexts are created in NI through:

- The Outdoor Recreation Action Plan For Northern Ireland, produced in 2014, ("Our Great Outdoors"⁶) which aims to create "a culture of dynamic, sustainable outdoor recreation in Northern Ireland" through improved access and infrastructure development, encouraging increased participation, benefitting local communities and encouraging people to enjoy the outdoors and show a high degree of responsibility for using and supporting the natural environment and heritage

⁵ <https://www.daera-ni.gov.uk/sites/default/files/publications/doe/water-report-reasons-for-status-for-water-bodies-within-lower-bann-LMA-2014.pdf>

⁶ Sport NI, DCAL, NITB, NIEA - Our Great Outdoors, 2014

- “Sport Matters: The Strategy for Sport and Physical Recreation 2009-2019” articulates the vision for competitive sport and physical recreation, the vision being: “...a culture of lifelong enjoyment and success in sport...” For the first time in Northern Ireland, this document outlines a broader Government commitment to sport and physical recreation – a commitment that extends beyond any single department or organisation and permeates the decision-making and investment processes of the Government of Northern Ireland. This commitment has been formally endorsed by the Northern Ireland Executive and Assembly

SportNI works with the many sporting associations, governing bodies and clubs throughout NI which provide an important mechanism for engagement and promoting participation, as well as maintaining standards associated with each sport. SportNI’s role is to provide advice and guidance to support governing bodies of sport in the management of their sports, including areas such as strategic planning, raising performance standards, sourcing funding, employment matters, and good practice. For the Lower Bann, the sport governing bodies that are relevant relate to angling, canoeing, cycling, rambling, sailing and water-skiing.

In section 5 below, we address participation rates in these recreational and sporting activities.

Tourism NI has identified the “Unique Outdoors” as one of its four key pillars⁷, designed to articulate the attributes and attractors of NI and around which the NI tourism brand and marketing activity is orientated. The relevance of the Unique Outdoors for the Lower Bann lies in the strength of this theme.

“This theme involves a combination of physical activity; cultural exchange or interaction; and/or an engagement with nature. This theme focuses on all of the activities and experiences we can offer visitors, which will contribute to our being recognised as a strong outdoor recreation and adventure playground.”⁸

These tourism-related outdoor assets (across NI) include:

- Signature Asset - Links golf, mountain biking, mountain ranges, coasts, lakes/loughs and rivers
- Supporting Assets - Parkland golf, canoe trails, adrenaline activity, walking, cycling, surfing

The implications for the Lower Bann lie in the need to align leisure and recreational opportunities with the Unique Outdoors pillar in the marketing of the Lower Bann and in visitor servicing.

Section 5 below highlights the recreational and leisure uses of the Lower Bann and the intense use to which it is put by local groups and users, as well as visitors. Thus, the Lower Bann provides, along its length, facilities and an attraction to anglers, water sports and boating enthusiasts, walkers, on and off road cyclists, wildfowlers, wildlife watchers and boat cruising.

3.3 Tourism

While the planning policy environment (see next section) refers to tourism, the overriding strategic context will be established by the new tourism strategy for NI, which will, link into the Programme for Government, the NI Investment Strategy, Economic Strategy and an Anti-Poverty/Social Strategy.

However, the policy context for tourism in NI is in a state of flux at the time of writing. The Department for the Economy (formerly DETI) draft tourism strategy to 2020 has led tourism growth in recent years,

⁷ The others being Creative Vibe, Living Legends, Coast and Lakes

⁸ Source: NITB – Unique Outdoors - A practical guide to experiential tourism in NI

but will be superseded later in 2017 when the new tourism strategy for NI will come into force. The draft strategy to 2020 aimed to:

- Increase visitors in NI from 3.2m (in 2010) to 4.5m by 2020
- Increase earnings from tourism from £529m to £1 billion by 2020
- Progressively accelerate spend by visitors
- Target specific markets and market segments
- Support indigenous high quality businesses to grow
- Be “visitor inspired” in all our actions, by which we mean visitor responsive and aware

At the time of writing, work is currently underway to prepare the new tourism strategy for Northern Ireland. The final outcomes of the new strategy won't be known until later in 2017, but the direction of travel resonates with the analysis of many of the key issues relating to tourism on the Lower Bann. The table below summarises the consultation outcomes to date on the NI tourism strategy and the tourism implications for the Lower Bann

Table 1: Tourism Strategy to 2025 Consultation Highlights

Department for the Economy Tourism Strategy 2025 Headline Messages from Regional Engagement ⁹	Lower Bann Corridor Tourism analysis and implications
The tourism strategy is an opportunity to change mind-sets - looking forward, the strategy should be bold, inspire belief and challenge complacency.	The tourism mind-set around the Lower Bann also needs to change. The river is not seen as a destination; the tourism offer and sector are dispersed and fragmented, necessitating a focused approach to tourism to make it a competitive sector of the economy and for it to add value to the Lower Bann.
The baseline message: tourism includes private, not-for-profit and government organisations. The tourism trade is made up of a small number of larger organisations and lots of micro-enterprises. It is considered 'fragmented'. Given the fragmentation, the strategy is an opportunity to develop coherence.	Tourism around the Lower Bann includes a number of very successful tourism operators; but many smaller operators don't work in networks and work has to be undertaken to generate greater coherence amongst operators across the area, to be able to market more effectively to the visitor and offer them quality experiences.
Tourism should be outward looking and be internationally competitive. The domestic market is finite. Looking forward: the challenge is to be competitive on the international stage to grow out of state tourism. This focus should challenge over-reliance on the domestic market.	This reinforces the direction that this strategy is taking – the focus on the international and out of state visitor and the interventions to make this a reality. The question is what does the international visitor want NOT what products do we have to offer?
The status of tourism should be elevated given its economic importance. There should be an increased	Agencies and organisations need to work more closely together to enhance the

⁹ These key messages set the framework for the next stage of the strategy developmental process, which is to produce a draft vision document followed by an action plan. See <https://www.detini.gov.uk/publications/key-messages-regional-stakeholder-engagement>

Department for the Economy Tourism Strategy 2025 Headline Messages from Regional Engagement ⁹	Lower Bann Corridor Tourism analysis and implications
focus on visitor spend (£) and jobs created/ sustained. Language should change to tourism as an “export” industry, with support for the sector to commercialise and professionalise.	economic importance of tourism, so it can contribute to the economic and social wellbeing of the whole area.
The lack of a strategy has allowed incoherence to grow gradually across all parts of the sector. Looking forward: there is an opportunity to make key choices and develop coherence: what will be internationally competitive look like; what investment decisions are required; what compelling message (or messages) do we move forward with?	This strategy aims to answer these questions locally and provide a rationale for effective intervention along the length of the river corridor

The overwhelming conclusion for the Lower Bann from the analysis so far for the NI tourism strategy is that it, and this study, are aligned. This isn't to underestimate the difficulties associated with making the Lower Bann a visible and attractive tourism destination, but it does suggest that support and intervention are necessary actions to achieve this (see the Action Plan below). It should not be forgotten however that the Lower Bann also serves wider uses than just tourism –recreation, sport, healthy living and education – that go beyond the tourism objectives.

3.4 Planning Context

The identification of recreational, tourism and commercial product opportunities in the Lower Bann corridor is dependent on demand driven criteria and the constraints imposed by the planning regime. The objective of the planning system is to further sustainable development and improve the well-being of people and communities. This section catalogues the planning context for development along the Lower Bann and the river corridor. More detail on the policies and plans is provided in the appendices.

The overall hierarchical scheme for planning in NI can be illustrated as follows:

1. Programme for Government¹⁰
2. Strategic Planning Policy Statement for Northern Ireland (SPPS) - Planning for Sustainable Development, September 2015
3. Regional Development Strategy, 2035 (prepared by Department for Infrastructure¹¹)
4. Planning Policy Statements on a wide range of planning related topics (prepared by Department of the Environment)
5. Local Development Plans for new district areas (when they come into being) - These will supersede existing Area Plans and within many districts, topic position papers will serve as the evidence base for the development of Local Development Plans and policies and proposals falling within them
6. Village or Town Regeneration Plans where they exist (prepared by the Department for Communities¹² and local authorities)

Here we summarise the planning regime in so far as it impacts the Lower Bann Corridor.

¹⁰ Published in draft by the NI Executive 27th May 2016

¹¹ Formerly Department for Regional Development

¹² Formerly the Department for Social Development

Programme for Government

The recently published, consultative, Programme for Government sets a governmental and planning context for development on the Lower Bann and in the river corridor. Although seemingly remote from “on the ground” planning direction and regulation, the Programme for Government sets the tone for the strategic context for other key Executive strategy documents, including the Investment Strategy, the Economic Strategy and an Anti-Poverty/Social Strategy, and will inform the development of the Executive’s budget and provide a mechanism for helping prioritise the use of limited funds.

Although the Programme for Government goes through a consultation period, the Executive does say that certain commitments will be met; in relation to the Lower Bann this specifically includes the flagship project of the M2/A6 Belfast – Londonderry transport corridor, which includes the major road scheme on the A6, which crosses the Lower Bann and potentially¹³ impacts Lough Beg and the fauna and flora here.

Other implications for the Lower Bann derive from the Programme for Government setting key outcomes for agencies and local government and setting the financial context for their interventions.

Strategic Planning Policy Statement for Northern Ireland (SPPS) - Planning for Sustainable Development, September 2015.

This policy document consolidates many previous planning policy statements and emphasises that development is not at the expense of compromising on environmental standards.

The SPPS gives guidance to local authorities on what should be included in their development plans and provides the core planning principles to underpin delivery of the two-tier planning system (from April 2015).

Key statements of principle that have implications for the Lower Bann, contained in the SPPS comprise:

- Government recognises that open space, sport and outdoor recreation are important to society now and in the future. It supports many cultural, social, economic, health and environmental benefits.
- Open space...can also help to attract business and tourism and thereby contribute to the process of urban and rural regeneration
- The aim of the SPPS in relation to tourism development is to manage the provision of sustainable and high quality tourism developments in appropriate locations within the built and natural environment
- Our natural heritage provides a wide range of opportunities for enjoyment, recreation and sustainable economic activity

The implications for the Lower Bann Corridor lie in the guidance the SPPS gives to local authorities in the preparation of their own plans. Thus, sustainability criteria include planning for open space, outdoor recreation, sport and health and environment, as well as the importance of these to the economy.

¹³ Opponents suggest it will drastically impact wildlife on Lough Beg while a High Court ruling in March 2017 found “no breach of the habitats directive.”

Regional Development Strategy, 2035

This is the spatial strategy of the Executive. Its purpose is to deliver the spatial aspects of the Programme for Government and complements the Sustainable Development Strategy and informs the spatial aspects of the strategies of all Government Departments and local authorities.

The main implication for the Lower Bann from the Regional Development Strategy is the proposition of clustering settlements to support the sharing of resources/facilities: this broadly follows the lines of the reform of Public Administration and the establishment of the new authorities, relevant to the Lower Bann study, in April 2015:

- Causeway Coast and Glens (bringing Coleraine, Ballymoney, Ballycastle and Limavady together as a cluster)
- Mid Ulster (Cookstown, Dungannon and Magherafelt)
- Mid and East Antrim (Ballymena, Antrim¹⁴ and Larne)
- Antrim and Newtownabbey

The RDS recognises tourism as a key element underpinning sustainable economic growth in Northern Ireland and seeks to promote a sustainable approach to the provision of tourism infrastructure.

Specific Regional Guidance relevant to the Lower Bann corridor comprises:

- RG4: Promote a sustainable approach to the provision of tourism infrastructure. This includes the guidance that:

“Investment in tourism brings new facilities to our towns, cities and surrounding landscapes, thereby creating a sense of pride for the people of Northern Ireland. It also provides the opportunity to get maximum benefit from our wealth of environmental and heritage assets; our waterways, landscapes, coastline and built heritage.”

“Promote a balanced approach that safeguards tourism infrastructure while benefiting society and the economy. Under this heading it is recognised that all new or extended infrastructure required to support the tourism industry needs to be sensitively sited with proper regard to both the tourism need and the natural and built environment.”

“Encourage environmentally sustainable tourism development. Under this heading the RDS recognises that the development of tourism infrastructure needs to be appropriate to the location to ensure that the natural assets are protected and enhanced.”

- RG11: Conserve, protect and, where possible, enhance our built heritage and our natural environment

“The environment, both in terms of natural and built heritage, is one of Northern Ireland’s most important assets. Effective care of the environment provides very real benefits in terms of improving health and wellbeing, promoting economic development....”

And, with regard to the natural environment:

“Protect, enhance and restore the quality of inland water bodies. Rivers and lakes support habitats and species of national and international importance. The quality and the ecological status of the water environment should be improved through fulfilment of statutory obligations.”

¹⁴ Although the reform of local government excluded Antrim (town) from this authority

Overall, the Regional Development Strategy sets a positive context for the Lower Bann Corridor, by acknowledging and exhorting the councils, that tourism investment is not irreconcilable with sustaining the environment, which for the Lower Bann suggests that subject to design and location, tourism development can be accommodated.

Planning Policy Statements (PPSs)

These set out the policies on particular aspects of land-use planning in NI. Their contents influence the preparation of development plans and are also material to individual planning applications. A number of Planning Policy Statements have relevance to the Lower Bann corridor:

- PPS 2: Natural Heritage - specifically related to environmental designations such as RAMSAR wetlands, Special Protection Areas (SPAs) classified under the Birds Directive for their importance as areas for breeding, overwintering and migrating birds and Special Areas of Conservation (SACs), designated under the Habitats Directive
- PPS 4: Planning and Economic Development – including development in the countryside, should benefit economic activity while protecting or enhancing the environment
- PPS 6: Planning, Archaeology and the Built Heritage – which suggests that environmental assets considered to be of greatest amenity value, landscape quality or local significance are therefore worthy of protection from undesirable or damaging development
- PPS 8: Open Space, Sport and Outdoor Recreation – where Policy OS 6 will permit the development of facilities ancillary to water sports adjacent to inland lakes, reservoirs and waterways where a number of criteria are met (as specified in the document)
- PPS 16: Tourism – gives guidance on the development of tourist accommodation (hotels through to bunk houses and reuse of existing buildings for such purposes) and rural development for tourism purposes

The PPS' role is to guide land use planning and for the River Corridor, several have implications which councils need to acknowledge in the preparation of their own plans. However, while the PPSs support economic development, outdoor recreation and tourism, the detailed location and design of developments will be determined by Councils through their own local development plans detailed below.

Local Development Plans

The appendices highlight which plans are in preparation, whether topic papers have been prepared and what the prevailing plans are until the new development plans come into existence.

The complexity of the local planning scene in so far as it impacts the Lower Bann corridor derives from the fact that four area development plans are in preparation for the new councils, and five historic plans still guide development - from Antrim, Ballymena, Ballymoney, Coleraine (these last two now superseded by the Northern Area Plan 2016) and Magherafelt.

Within three (new) districts, topic position papers are in various stages of preparation, acting as the evidence base for and contributing to the development of the Local Development Plans. The appendices detail those prepared at the time of writing.

The substantive links to the Lower Bann from these development plans are:

Antrim and Newtownabbey is governed by the Antrim Area Plan 1984-2001, adopted in 1989, which identified the environmental sensitivity and importance of Lough Beg and where development proposals in Toome will be acceptable if they are in keeping with the existing village character and where Toome was identified as a settlement suitable for further limited growth.

The Causeway Coast and Glens position paper on the environment highlights the Special Protection Areas and Areas of Special Scientific Interest at the Lower Bann estuary. Equally, the paper emphasises that rivers are a key feature in the Borough, being important corridors for wildlife, tourism and recreation. There is scope to provide recreational features along rivers whilst protecting their ecological value and the River Bann (amongst others) also provide opportunities for recreation, fishing and water based tourism.

The Northern Area Plan identifies that:

“Coleraine is relatively well provided with leisure facilities and recreational land. The Plan identifies open space, parks and playing fields which are protected from inappropriate development. The River Bann corridor is a major asset to the town and this must be protected, managed and enhanced when and where possible. Considerable progress has been made in opening up the river margins as a major recreational resource, notably Christie Park and its southern extension to Castleroe, and Mountsandel Wood. The Plan promotes the further extension of public access along both banks of the Bann, and facilitates the appropriate development of supporting infrastructure servicing the recreational use of the river.”

At a tactical level, the plan also says that development around Mountsandel Road in Coleraine “shall include the provision of a pedestrian/cycle link along the entire frontage with the River Bann.”

Other specific, sensitive, sites (e.g. Castleroe Forest and Bann Banks) will be protected from development.

Mid and East Antrim’s Environmental Assets position paper emphasises the Areas of Scenic Quality and environmental sensitivity and protection afforded by the RAMSAR, SAC and ASSI sites along the Lower Bann. Crucially the paper draws attention to the importance of migrating eels:

“Today the Bann is well used for recreational boating and fishing and is an important conduit for migrating eels and salmon which are the most important economic features of the river...”

The Tourism position paper identify that:

- Water sport activities, including those based on the River Bann have important tourist potential
- Activity tourism such as angling, hill walking and horse riding have the potential to create important economic benefits particularly in the rural area
- The hills, glens, coast and inland waterways of the area are very important in terms of their natural heritage and landscape value

The **Mid Ulster** Tourism position paper states:

“It should be noted that strategically there is no cohesive strategy for inland waterway development in Northern Ireland. There is undoubtedly a long term need for an NI Inland

Waterways strategy which is compatible with the Waterways Ireland strategy with Lough Neagh as its hub. If the waterways were opened up, the tourism potential of Lough Neagh would be transformed significantly. However in the short to medium term it is unlikely that any of the canals will be fully opened and for the purposes of the timescale of this tourism destination plan, priority has been given to the urgent needs of the Lough itself, with the possibility of opening up the Blackwater and Upper Bann rivers through dredging work.”

The Mid Ulster Tourism position paper also highlights key tourism assets and resources, as the basis for tourism development, as follows:

- Natural heritage, including protected RAMSAR wetlands, Special Protection Areas at Lough Beg and Areas of Special Scientific Interest (including e.g. Dead Island Bog, which is one of the best remaining examples of a lowland raised bog in the flood plain of the Lower Bann)
- Activity tourism, especially angling, canoeing and water sports, golf (Moyola golf club at Castledawson in the Lower Bann corridor) and cycling

The Magherafelt Area Plan 2015 highlights:

- The natural resources of the District, such as the river Bann, Lough Neagh and the Sperrin Mountains, provide a wealth of opportunities for active outdoor pursuits such as sailing, water sports, angling and walking. The district contains a variety of informal outdoor recreational open space, particularly forests such as Moydamlagh and Portglenone forest

Town or Village Regeneration Masterplans

These have been prepared by the Department for Communities¹⁵ and local authorities and of relevance are the Coleraine Town Centre Masterplan, the Village Regeneration plan for Kilrea and that for Toome.

The Coleraine Town Centre masterplan suggests that:

“A masterplan provides a coherent long-term strategy which includes the steps that are required to realise its vision. While growth of the Town has continued..... Coleraine does face a number of key challenges including ... an imbalanced relationship with the River Bann and questionable environmental quality particularly along key routes.”

The Masterplan suggests a weakened relationship between the Town Centre and the River Bann and:

“Coleraine also appears to have turned its back on its key asset, that being the River Bann.”

The Village Regeneration plan for Kilrea suggested that Kilrea has a character, culture, quality of life, and range of activities that make it an attractive place to live and visit. There is already a broad range of recreational assets within and surrounding the town such as angling, walking, cycling and golf, the potential of which needs to be fully realised. The plan identified the tourism opportunities for Kilrea:

- Boutique hotel
- Game and coarse angling
- Further development of the River Bann (in the medium to long term the proposed reopening of the Lagan and the Ulster Canals)
- Develop the Diamond as an attraction in itself

¹⁵ Formerly the Department for Social Development

- Heritage Trail within the town
- Conservation Area Status, to safeguard built heritage and listed buildings
- Exploitation of Plantation heritage
- Nearby potential at Portna

The plan also recommended prioritising the River Bann in terms of potential to grow special interest/ activity tourism – angling, canoeing and walking – and to exploit the potential of coarse angling competitions to attract European visitors.

The Toome Village Masterplan was launched in 2011 and was funded under the Rural Development Programme (and therefore has no statutory role). The key aspect of the masterplan is:

“...Toome will reinvent its relationship with the River Bann and Lough Neagh to become a vibrant and attractive tourist destination which capitalise on its strategic waterfront setting and historic Irish pioneer origins”.

A series of initiatives are proposed both in the village and along the river and canal side which will add to the recreational and tourism opportunities at Toome.

Conclusions

While the hierarchical planning context seems complex, its importance lies in the guidance it gives to councils in their plan preparation and decision-making in response to development proposals. There is consistency for the Lower Bann river corridor in that outdoor recreation, healthy living, the environment and sustainable development are all to be encouraged while tourism and economic development can be accommodated. This is good news for the Lower Bann: the environmental designations protect the quality of the environment but economic and commercial development can be accommodated in the right locations and to the right designs.

At the time of writing, progress in the preparation of the councils’ development plans all lend support to the Lower Bann being more strongly recognised as an asset – for a range of policy and use criteria – and for finding the balance between economic and commercial development with sustainability and the environment. At the same time the detailed plans for Coleraine, Kilrea and Toome all support development in the river corridor.

3.5 Environment

The environmental context for the Lower Bann has been highlighted under the sections above on Navigation and the Waterway and Planning. The planning regime provides a comprehensive framework for safeguarding the environment through i.e. the Strategic Planning Policy Statement, Regional Development Strategy, Planning Policy Statements and development plans for the local authorities within whose areas the Lower Bann falls.

In NI, the environment and safeguarding its importance is to be balanced by economic development priorities, suggesting that:

“The overall objective of the planning system is to further sustainable development and improve well-being for the people of the North..... the planning system can, and should, do more to unlock development potential, support job creation and aid economic recovery, but not at the expense of compromising on environmental standards. Sustainable development is therefore at the heart of the SPPS and our planning system.”¹⁶

Also, the Regional Development Strategy suggests that:

“We must also plan to deal with climate change as a key environmental and economic driver. It is important that we in Northern Ireland play our part by reducing greenhouse gas emissions and that we plan for the impacts which climate change brings. The Strategy¹⁷ sets out measures on transport, energy and the location of jobs and houses to help address and adapt to these important issues. Sustainable communities are at the heart of what we do. It is important that we maximise the use of existing infrastructure and services and that we create places which are safe and inclusive and offer equality of opportunity. The Strategy is not limited to land use but recognises that policies for physical development have far reaching implications. It therefore addresses economic, social and environmental issues aimed at achieving sustainable development and social cohesion.”

In the RDS Environmental Report, measures for managing the Neagh Bann River basin are identified. Issues to be addressed include:

- Abstraction and flow regulation
- Diffuse pollution from rural and urban land, including effluent enrichment
- Point source pollution from sewage and industry
- Changes to morphology (physical habitat)
- Invasive alien (non- native) species

The Landscape Character Assessment for the Lower Bann Floodplain identifies the characteristics of the area, its sensitivity and gradual degradation, through e.g. hedgerow removal, poor condition of low-lying pastures.

The report and accompanying maps identify the wide range of environmental designations in the Lower Bann corridor, established to protect wetlands, sites of scientific interest and the interest of wildlife and flora.

These define the environmental constraints in the river corridor and will act in the future as reference and source material for agencies and those with development proposals. The maps identify landscape and areas of ecological and environmental sensitivity (together with formal designations) for the development of potential sites in the study area.

¹⁶ Strategic Planning Policy Statement

¹⁷ The Regional Development Strategy

3.6 Consumer Technology

The importance of technology in reviewing opportunities for recreation and tourism in the Lower Bann corridor lies in the rapid and growing use of technology to gather information and make decisions.

Twitter, Facebook, YouTube, Instagram, TripAdvisor, among others, have created new worlds of online participation. Sharing ideas, recommendations and experiences on the internet is becoming commonplace. The opportunities for tourism marketers to engage with consumers through social media are numerous: starting with joining conversations to raising awareness about the Lower Bann and sports or recreational activity on or near the river, and carrying through to encouraging consumers to share their great experiences after they return home (from a holiday or a day trip).

Smartphones have become the most popular device for getting online in NI¹⁸, with 63% of NI adults owning one (up from 21% in 2011). 54% of households in NI also have a tablet, up from just 2% in 2011. This penetration is replicated and exceeded throughout the UK; while some other nationalities might have lower levels, some have higher, with Singapore the highest globally, with 79% of females and 73% of males using e.g. instant messaging¹⁹. Whatever else, internet, smartphone and tablet usage is continuing to grow, both in developed and developing economies.

Other consumer trends in technology use in recreation and tourism comprise:

1. Enhanced use of the mobile and smart phones for information gathering and booking (as much as 25% of the travel bookings in the US were done on a mobile device and that number will continue to rise). Destinations and operators are responding with their own mobile strategy or app to do business
2. Other technology changes relate to “beacon technology”, where operators will be able to push data and to seamlessly communicate with customers, allowing integration of travel planning, booking tickets and hotels, destination guides on arrival and follow up on return home, instead of using different media or apps (Apple are developing such a solution at the moment)
3. New payment mechanisms to complete transactions when travelling; finding the niche and personalising products and prices to meet individual needs and wants. This technology will adjust pricing according to demand and supply patterns at a day's notice
4. New technology based operators like Airbnb and Uber have completely different business models compared to traditional travel companies. They are technology platforms that market privately-owned assets or resources. They are attractive because they offer lower prices, better accessibility, great flexibility, ease of use, including transparency and interactive communications
5. Social media channels such as review portals, blogs and forums have become very popular for planning trips, and are used intensively by more and more travellers. There were an estimated 1.55 billion active monthly users on Facebook, 1 billion on YouTube, 540m on Google+, 400m on Instagram, 320m on Twitter, 1 billion on YouTube and 187m on LinkedIn
6. One of the most important trends for the future - 90% of online consumers worldwide trust recommendations from people they know, while 70% trust consumer opinions posted online

¹⁸ Ofcom's 2015 Communications Market Report

¹⁹ Deloitte's Global Technology, Media and Telecommunications, 2015

7. Some of the latest trend reports on the youth market (below age 35) suggest that consumers of all nationalities will download local information before when visiting areas with limited or no broadband, so they still have local visitor information on their smart phone or iPads

Broadband availability across NI is assembled by Ofcom, with, on average, across NI, 77% of premises having access to superfast broadband in 2015²⁰, although only an estimated 40% of rural premises have such access. The average download speed of superfast broadband in NI is also below that of the rest of the UK (56Mbit/s, compared to the highest in Scotland, at 67Mbit/s)²¹. The situation in the Lower Bann corridor hasn't been assessed, but we can suggest, through anecdote and analysis of other rural areas of NI, that broadband penetration will be as poor for all areas of the River Corridor, other than Coleraine.

There are two implications for the Lower Bann Corridor:

1. Poor broadband availability impacts the ability of businesses to promote themselves effectively through the internet
2. Visitors and users will find intermittent broadband availability, reducing their ability to gather information about walks, facilities, events etc. and therefore likely to impede (especially if they are a visitor) their access to these facilities and enjoyment of the river. This has serious implications too for the ability of water users to be able to access information about changing water levels (see sections 1.1 and 3.1 above)

It is necessary for the steering group agencies to advocate better broadband in the River Corridor and support investment which enhances the experience for users, visitors and the businesses/operators in the area themselves.

²⁰ The latest date for available Ofcom analysis

²¹ http://stakeholders.ofcom.org.uk/binaries/research/infrastructure/2015/downloads/connected_nations2015.pdf

4 Recreation and Tourism Market Intelligence

4.1 Waterways Market Analysis

Waterways Ireland undertakes occasional Waterway Users surveys; data here is taken from the 2010 survey, with interviews from August through to October (the 2014 survey being based on interviews over October and November 2014). While based on users of all waterways, some data is detailed for individual waterways, including the Lower Bann.

The research demonstrates the broad appeal of the waterways, with all ages and social class groupings making use of the waterways. More female visitors use the waterways in 2010 (41% for all waterways; 44% for the lower Bann) than was the case in 2004 (32%), bringing more balance to the gender profile of users.

The broad appeal of the waterways is reflected in the wide variety of activities undertaken; users are taking part in everything from jet skiing to feeding ducks. The sheer diversity of the activities mentioned by visitors illustrates that the waterways have something on offer for everyone.

The key motivator for using the waterways is recreation (52%) followed by a break/holiday (21%). A wide variety of recreational activities are being undertaken on the waterways. The top three activities being undertaken are walking (62%), private cruiser/barge (15%) and angling (11%).

Users of the waterways are primarily resident on the island of Ireland (82%), 66% are based in the Republic of Ireland and 16% are based in Northern Ireland. Visitors coming from overseas are mainly from Great Britain (7%), Germany (4%) and the USA (2%). Four in ten overseas visitors visited Ireland specifically to make use of the waterways. This figure increases to 67% to those visiting from Europe²². For the Lower Bann survey respondents, 96% were from NI.

In terms of sources of information, those surveyed relative to the Lower Bann derived their information about the river from the following sources:

- Friends, relatives and word of mouth 43% (the average across all Waterways Ireland rivers/canals was 39%)
- Live in the area 61% (second highest after the Union Canal, the average was 33%)
- Newspapers and magazines 9% (interestingly a higher proportion than the average at 4%)
- Regular user 8% (average 16%)
- Tourist Guide Book 3% (average 9%)
- Waterways Ireland Website 0% (average 15%)
- Internet 0% (average 14%)

The motivations to visit also have interesting implications for the Lower Bann:

- Recreation/activity 62% (average across all Waterways Ireland rivers/canals was 52%)
- I live locally/convenient 35% (average 11%)
- Natural environment 23% (average 13%)
- Came with family/friends 7% (average 11%)
- For a break/holiday 4% (average 21%)
- Relaxation 4% (average 12%)

²² There may be a strong emphasis on overseas visitors visiting for cruising

In terms of activities undertaken, the Lower Bann results are significantly below or on the average for all activities except walking, where the Lower Bann has 82% citing this as their motivation to visit, with the average across all waterways being 62%.

In terms of time spent on the waterways, the Lower Bann scored highly for visits of less than ½ day (86%, with the average for all waterways being 56%).

Survey respondents were asked their reasons for positively rating each waterway (where the Lower Bann conformed to the average across all waterways, but in contrast to them all, no one scored the Lower Bann negatively); notable reasons were:

- Natural environment 52% (average 24%)
- Well-kept/maintained 24% (average 6%)
- Enjoyed it/good day out 15% (average 34%)
- Relaxation/peacefulness 9% (average 19%)

This data, while based on modest numbers of respondents, has interesting marketing implications in terms of how the Lower Bann and its activities are marketed to residents and visitors in the future.

4.2 Visitor Market Segments

Tourism Ireland and Tourism NI have adopted a tiered and segmented approach to marketing and promotion. This cuts across the traditional lines of age and demographics and, instead, seeks to understand people’s preferences and motivations looking at why people take holidays and what they want to feel, both during and after.

Tourism NI and Tourism Ireland’s market segmentation suggests that the following groups of visitors are interested to a greater or lesser extent in the outdoor and adventure tourism product.

Table 2: Tourism NI and Tourism Ireland Market Segments

NI & ROI markets	Great Britain, Germany, France, North America markets
<ul style="list-style-type: none"> • Time Together • Mature Cosmopolitans • Family Fun • Young and Lively 	<ul style="list-style-type: none"> • Social Energisers • Culturally Curious • Great Escapers

A table with detailed motivators to visits based on Tourism Ireland and Tourism Northern Ireland’s market analyses is catalogued in the Appendices volume 2.

The local authorities²³ have also adopted a focused and targeted marketing approach in their tourism destination plans. This includes the NI domestic market because this will help sustain visitation and continue to bring revenue into the area. The emphasis of their future marketing is however, primarily focused on out of state and overseas markets, through Tourism Ireland.

The key principles considered in identifying the visitor market segmentation and the best prospect for growth for the Lower Bann is based on:

²³ Antrim & Newtownabbey, Causeway Coast and Glens, Mid and East Antrim, and Mid Ulster

1. The strength of the market for outdoor activity pursuits among the Domestic, ROI and GB markets
2. The development of “experiences” (i.e. things to see and do) that can occupy a one to four day stay in the area – vital to attract the domestic Irish visitor market, as well as the overseas holidaymaker
3. The cultural and heritage offer within the Lower Bann Corridor
4. The need to develop a distinctive identity that complements and fits within the marketing and branding of the local authorities e.g. Causeway Coastal Route, Seamus Heaney etc.

The visitor segmentation plan for the Lower Bann is based and aligns with the characteristics of the different users and their motivations identified by Tourism NI and Tourism Ireland. These are:

- Local residents – while they will be day trippers and will not spend a lot, it is necessary to influence them to encourage friends and family to visit (for the experiences offered) and to keep them advised of the importance of tourism to the area and the activities associated with the Lower Bann. They will also be influential to the quality of welcome received by visitors
- NI residents – many will be day visitors too, but it is important to raise the profile of the Lower Bann for recreation and tourism, and of the tourism experiences/products on offer and encourage changed behaviour, to visit the Lower Bann and extend their stay
- Out-of-state visitors will come from a variety of originations with different characteristics and motivators. Whilst water based activities will not generally be a primary reason for a visit, other activities undertaken along the Lower Bann corridor will be (i.e. wildlife watching, walking, culture & heritage)

The table below identifies the primary and secondary opportunities related to markets and market segments identified in the current Local Authorities and Tourism NI and Tourism Ireland marketing strategies.

Table 3: Market segments

Markets	Activity										
	Walking	Cycling / Mountain Biking	Canoeing	Horse Riding	Sailing	Culture & Heritage	Angling	Cruising	Water-skiing / Wakeboarding	Wildlife	Golf
Primary Markets											
Local Residents	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
NI Residents	✓	✓	✓	✓	✓	✓	✓	✓	✓		
ROI	✓	✓	✓		✓	✓	✓	✓		✓	✓
Great Britain	✓	✓	✓		✓	✓				✓	✓

Markets	Activity										
	Walking	Cycling / Mountain Biking	Canoeing	Horse Riding	Sailing	Culture & Heritage	Angling	Cruising	Water-skiing / Wakeboarding	Wildlife	Golf
Secondary Markets											
USA / Canada						✓					✓
Germany	✓					✓	✓	✓		✓	
France	✓					✓					
Netherlands	✓	✓				✓					
Tertiary Markets											
Spain	✓					✓					
Italy	✓					✓					
Scandinavia	✓	✓				✓					✓

The segments identified as primary target markets i.e. Local Residents, NI Residents and ROI are encompassed broadly within the Time Together; Mature Cosmopolitans & Family Fun segments and for the GB the Culturally Curious and Great Escapers.

The secondary and tertiary market segments focus on the Culturally Curious and Great Escapers as the markets with the best prospect for growth. It does not ignore specialist markets such as angling and cruising markets (a declining out of state segment in recent years).

Restoring cruising and angling market volumes needs to be undertaken by linking the marketing approaches of key partners e.g. Tourism Ireland and the local authorities.

4.3 Outdoor and Activity Tourism Market Trends

Outdoor tourism used to be a small, niche segment of the travel industry, thought to be only for backpackers and fitness-freaks willing to endure hardship and discomfort to get an authentic experience. As ATTA²⁴ has highlighted (see below), this tourism activity now attracts mainstream groups – professionals, families, groups of friends and a far wider range of people concerned with health and wellbeing.

However, pre-family and family life stage groups are flat or declining in terms of population growth. The third age and retired groups are forecast to grow at a much faster rate. There are already more people aged over 60 than under 16 and by 2025 there will be more over 60s than under 25s.

Mintel²⁵ reports that continuing growth in the activity market is likely to come from:

- Family adventure market
- Older demographic groups

²⁴ Adventure Travel Trade Association

²⁵ www.mintel.com

- Customers becoming more involved with packaging breaks as co-creators of their holidays/breaks
- Short intense activity breaks as an alternative or adjunct to city breaks
- Combination of activity and luxury

Other drivers relevant to the outdoor tourism sector are as follows:

- Interest in healthy life styles and wellbeing (amongst some market segments)
- A desire to experience something different (experiential travel), particularly amongst ABC1s
- Changing demographics, particularly in relation to the increasingly health conscious, environmentally aware ageing population
- Increasing levels of disposable income, which have helped to make taking part in activity tourism affordable (along with, in some instances, decreasing cost of equipment)
- Increasing awareness of activity tourism via the internet
- Growth of tour companies specialising in activity tourism and increasing professionalism in the sector
- Greater awareness amongst consumers of the environmental impacts of tourism, particularly overseas travel, perhaps, leading to an increase in domestic UK tourism
- Economic reasons for increase in the “stay at home holiday” market

With the range of water based activities on the Lower Bann, there would opportunities for stronger appeal to the adventure tourism market.

The international context for adventure tourism²⁶ is set by estimates of its value. In 2010, the Adventure Travel Trade Association (ATTA) estimated global adventure tourism to be worth US\$89 billion (£72 billion at today’s currency exchange rate), rising to US\$263 billion in 2013 (£214 billion). This 197% increase in three years can be attributed to:

- An increase in international departures (overall tourism)
- An increase of travellers going on adventure trips
- An increase in average spending²⁷

In 2013 Fáilte Ireland estimated activity tourism to be worth €851m (£729m at current exchange rates) to the Irish economy in the previous year. The activity sector is considered a high-yield segment with the average activity-seeker considered to be spending 40% more than the average holidaymaker. In 2012, approximately 919,000 activity tourists visited Ireland from the following markets:

- Europe – 415,000 (45%)
- Britain – 297,000 (32%)
- North America – 176,000 (19%)
- Other areas 31,000 (4%)

Mintel estimated outdoor adventure to be worth €128m to NI in 2013 and predicted 14% growth on an all-Ireland basis from 2014 to 2018. The largest growth can be expected to come from ‘soft’ adventure activities such as walking and cycling, which provide an opportunity for the Lower Bann.

²⁶ Made up of hard activities (such as climbing and trekking) and soft activities (e.g. walking, bird watching and safaris)

²⁷ Source: NITB - Activities Tourism – Sharing Success 2011 and UNWTO report on adventure tourism 2014

5 Recreation and Tourism Usage and Participation

SportNI reported in its Section 75 Annual Report, 2013/14, that it exceeded its annual target of increasing participation in sport and physical recreation by 50% (419,702 against a target of 280,000) for levels of participation among people of all ages, identities, abilities and backgrounds. This figure represents a cumulative total of all reported participant engagements in sport and physical recreation as a result of all SportNI's funded projects and programmes.

Sport and physical activity has the capacity to positively impact on the nation's health, influence educational attainment and behaviour, engage disaffected young people, and serve as a positive capacity building tool for social inclusion. Sport and physical activity is an important strand in the mix of factors which add value to life in our communities²⁸. The UK Chief Medical Officer published guidelines recommended that all adults should undertake a minimum of 150 minutes of at least moderate-intensity physical activity (activity that makes you slightly out of breath) each week for health-enhancing benefits.

Participation in sport and active recreation is gathered through the Northern Ireland Adult Sport and Physical Activity Survey (SAPAS), which provide statistically robust data on participation, club membership, volunteering, coaching attitudes to sport and spectating.

Data is also gathered through the Continuous Household Survey, which indicated in 2012 that 50% of people across NI had participated in sporting activity in the last 12 months, which was an increase on previous years; 53% of NI adults meet the current recommended minimum level of physical activity²⁹. However, there are population groups who participate much less than the average. For example, there is a strong disparity between male and female participants, with 34% of males but just 18% of females achieving the recommended 2.5 hours of activity per week. Significantly fewer respondents living in the most deprived areas participated in sport (38%) compared with those living in the least deprived areas (62%). Those with a disability, older people and those who are unemployed all participate less than the average in sport.

Sport NI commissioned Sheffield Hallam University to estimate the economic value of outdoor recreation:

- The GVA of outdoor recreation in NI was estimated to be £102 million
- Investment by central and local government was estimated at £36 million which generated an income of £69 million
- Outdoor recreation employs 3,537 FTEs

Outdoor activities

Major outdoor activities are cycling, walking, angling, sailing, canoeing, as well as golf and horse-riding. Many niche outdoor activities have been developed, especially by specialist activity providers, which in the context of the Lower Bann relate to water-based activities. More passive activities such as walking the dog and wildlife watching also take place on the Lower Bann Corridor.

²⁸ Source Sports Council for Wales evidence to NI Assembly, 2010

²⁹ Department of Health, Social Services and Public Safety (2014). Health Survey Northern Ireland: First Results 2013/14

The forests are also a resource in the Lower Bann Corridor. In 2009 Sport NI estimated there to have been 810,000 forest related tourists in Northern Ireland – comprising 168,000 out of state visitors; 184,000 domestic holiday makers (i.e. staying overnight) and 458,000 domestic day visitors. In terms of the activities undertaken in NI, evidence from household surveys (Public Opinion of Forestry 2010, Northern Ireland) and related research also conducted by the GB Forestry Commission, suggest that general visitors (i.e. those visiting forests for walking, picnics and recreation) dominated (62%), followed by visitors cycling/ mountain biking (15%) and those engaged in nature watching activities (15%). There is much smaller niche representation by visitors, active in horse-riding, water-based activities, and rallying (2.5% of visitors) in forests³⁰.

The following table looks at the evidence base for the range of sports and recreational activity taking place on the Lower Bann.

Table 4: Recreation and Tourism participation by activity

Recreation and Tourism participation by activity	
<p>Angling: coarse, game and sea fishing</p>	<p>Angling provides opportunities for many different levels of physical activity for people of all abilities, including the less able. Evidence of participation rates in NI is limited, although useful data emerges from elsewhere:</p> <ul style="list-style-type: none"> • The Environment Agency Public Attitudes to Angling (2010) report said that 9% of the population over 12 years of age in England and Wales (equivalent to 4.2 million people) had been fishing in the last year • Sales of the Environment Agency Rod Licence (a legal requirement for anyone fishing in freshwater in England and Wales) increased by 35% from 2000/01 to 1,431,981 in 2011 <p>Research in NI in 2013³¹ identified participation levels, social economic characteristics of anglers and barriers to participation.</p> <p>“While there were 19,697 resident licences purchased from DCAL in 2012, in reality it is not easy to provide an accurate assessment of the number of people taking part in angling because of the difficulties in assessing the numbers of unregistered anglers, and because it is not necessary to have a licence to participate in sea angling. However, it is not unreasonable to suggest that 3% of the population of Northern Ireland went fishing at some time during 2012. “</p> <p>Barriers to participation included issues of safeguarding children, quality of club facilities, issues of landowners’ liability, fish stocks, licensing regimes (acting as a barrier to participation in angling) and a shortage of coaches. Tourism evidence showed that the visiting angler is as valuable to the NI economy as a visiting golfer, walker, cyclist or horse-rider and all these groups spend more than the average ‘non sporting’ visitor.</p> <p>A recurring theme, about the impediment to the development of angling tourism was that the information available, both to domestic and visiting anglers, is difficult to access and is scattered across a wide range of sources.</p> <p>2013 research³² for angling in Ireland estimated the value of out of state angling as being €280 million (direct and indirect expenditure), with evidence of a decline in</p>

³⁰ NITB & Forest Service - Assessment of Existing and Potential Tourism Development Opportunities Available from NI Forests, 2013

³¹ Tourism NI, DCAL and Sport NI - A Strategic Review of Angling in Northern Ireland, 2013

³² Socio-Economic Study of Recreational Angling in Ireland (for Inland Fisheries Ireland by Tourism Development International)

Recreation and Tourism participation by activity	
	<p>recreational angling participation levels over the past decade. 2005 research in NI, estimated that angling from domestic and visitor markets) was worth £20.5m³³. (The gross expenditure from sea anglers in NI was estimated at £7.4 million; source: PricewaterhouseCoopers, 2007).</p> <p>We conclude that the coarse and game fishing sector is high yield (4.9 days per trip and £707 spend per trip) and extends visitation beyond the summer months, but numbers participating/visiting are limited. This suggests that while supply side facilities and water quality need to be concentrated on, marketing needs to be highly targeted and segmented (e.g. to or through fishing clubs and for events).</p> <p>While the Lower Bann is popular for angling (evidenced by the clubs and anecdotally by licence applications³⁴ through DCAL), there is very little data on the numbers and real value of angling recreation and tourism to the area.</p>
Cruising	<p>The inland waterway cruising market is also a strong niche for the Lower Bann, with evidence of demand and participation from the number of boats, marinas and pontoons. The Lower Bann is linked to Lough Neagh, but not to the rest of the Irish inland waterway system.</p> <p>The Irish Tourism Industry Confederation (ITIC) estimated that the boat rental sector (throughout Ireland) catered to an estimated 14,500 visitors in 2013, generating an estimated €20m in direct tourist expenditure (estimated at €40m in economic activity, when induced and indirect expenditure are included)³⁵. Germany remains the No.1 source of demand from visitors, accounting for almost half (48%) of all-Ireland rentals in 2013, a total of over 1,800 rental weeks. Germany with combined demand from Switzerland and Austria, accounts for almost two out of every three (63%) of total rental demand and 80% of demand from overseas.</p> <p>Until such time as the Lagan and Ulster Canal are opened up for cruising, to allow links between Lough Neagh and the Erne, the Lower Bann and Lough Neagh are isolated from the overall tourist cruise market. However a cruiser hire operator trialled rentals on the Lower Bann a few years ago and found a good response from customers, but experienced difficulties due to uncertainty with water flow due to sluice gate operations. There is also a day boat hire operation in place at the Crannagh which is proving successful. Co-operative working with Rivers Agency is imperative to future development of cruising as a viable tourism proposition on the Lower Bann.</p>
Cycling: on and off road	<p>In May 2014, the Northern Ireland Assembly undertook an Inquiry into the Benefits of Cycling to the Economy. Outdoor NI's web site www.cycleni.com generates 80,000 visits every year, 43% of whom are from Northern Ireland.</p> <p>Sustrans estimates that the cycle tourism market is valued at £1bn p.a. and that long distance cycle routes generate as much as £30m a year to the economies they pass through, sustaining over 600 full time equivalent jobs. In Scotland cycle tourism is estimated at £239m p.a. and in the Republic, €240m. This overview should be tempered by little available data directly relevant to the Lower Bann. The 2014 NI visitor attitude survey looks at Causeway Coast and Glens and the Lough Neagh</p>

³³ DCAL, the Loughs Agency, Irish Lights Commission and NITB conducted a Social and Economic Impact appraisal in NI in 2007 (PriceWaterhouseCoopers and Indecon). The £20.5m was split: £13.4m for game angling; £3.2m for coarse angling and £3.9m for sea/shore angling.)

³⁴ Which don't differentiate between residents and visitors

³⁵ Ireland's Inland Waterways Review & Outlook, June 2014, ITIC

Recreation and Tourism participation by activity	
	<p>destinations, and these can only approximate to participation rates along the Lower Bann; between 5% and 11% of visitors to these destinations cycled, while 52% and 43% walked (see below).</p> <p>The benefits of cycle tourism are clear - it provides incentives for people to visit an area and can help to attract new types of visitor who stay longer and spend more in a destination; cycle tourism can support existing local trade (particularly in the hospitality sector) and offers business start-up opportunities (such as bike-hire), particularly in rural areas. It is environmentally sustainable, uses existing facilities and helps disperse visitors.</p> <p>Despite the spectator appeal of the Giro in 2015, Fáilte Ireland has identified a significant drop in cycle tourism, in large part because of perceptions of unsafe roads. Sustrans cycle routes cross the area (96 running north to south, broadly along the river corridor; 93 running east to west on the north coast; 94 along Lough Neagh shores, through Toome). Any strategy to attract more cyclists must focus on the benefits of safe roads and off road trails, as well as continuous routes along the river.</p> <p>Informal trails along the river and in woods/ forests are not well publicised, in part because of access issues (and the reluctance to promote trails where access is not assured) and because no agency has pulled this opportunity together in the area and promoted it.</p>
<u>Golf Courses</u>	<p>Four of the golf courses in the Lower Bann area are parkland courses, for which lower demand exists from out of state visitors (who like to play links courses). These are Moyola Park Golf Club, Kilrea, Manor, and Brown Trout. None of these belong to the TNI quality assurance accreditation scheme. Portstewart Riverside Course is located along the banks of the Lower Bann and is an accredited by TNI.</p> <p>However at the estuary, within the 5 mile corridor, are three links courses, Castlerock Golf Club, Portstewart and Royal Portrush, all of which are links courses and more attractive to visitors, and accredited by TNI.</p> <p>Royal Portrush is a links course and site of the European PGA 2012 Irish Open and the 2019 Open Championship. Galgorm Castle Golf Club (close to the 5 mile corridor boundary) is the site of the NI Open, an annual competition, which is on the European PGA Championship Challenge Tour. (Also accredited by TNI.)</p>
<u>Horse-Riding</u>	<p>With six stables in the Lower Bann corridor, horse-riding is a niche outdoor activity, but the Lower Bann corridor offers interesting rides.</p> <p>In the UK, the overall number of those who ride has fallen, from 3.5 million in 2011 to 2.7 million in 2015; there has been a decline in regular riders, from 1.6 million in 2011 to 1.3 million in 2015, but there has been growth in the number of riders aged between 16 and 24, rising from 368,000 in 2011 to 403,000 in 2015.</p> <p>Fáilte Ireland's 2013 survey estimated the direct economic value of horse-riding as €76m p.a. The survey also identified that equestrianism is of greater interest to the British than the mainland European markets. Because it is a specialist interest activity it would need careful targeting. The domestic market (i.e. ROI) offers more interest in horse riding/ pony trekking than mainland Europe, with a core potential of around 400,000 offering a good opportunity to develop this niche for the Lower Bann area.</p>

Recreation and Tourism participation by activity	
Wildfowling	<p>Wildfowling is a traditional sport which involves the hunting of certain bird species such as ducks or geese for sport or food. Lough Neagh and parts of the Lower Bann, including part of the mudflats at the estuary attract wildfowling. The sport is restricted and regulated - relating to species that can be hunted, means of shooting and certain times of the year.</p> <p>The British Association of Shooting and Conservation³⁶ represents shooting and wildfowling clubs of which there are a number immediately in the area and further afield that use the Lower Bann for their sport. The Scottish Association of Country Sports also has a Northern Ireland membership, including around Lough Neagh and Lough Erne.</p> <p>The specific tourism and economic potential of wildfowling hasn't been evaluated, except as a subset of a wider range of country sports. Across the UK a consortium of country sports organisations calculated in 2014 that the value of shooting was £2billion across the UK³⁷ and £28m contribution to the NI economy. Crucially too, it was estimated that shooting supports the equivalent of 770 full-time jobs in the Province and influences the management of around 69,000 hectares of land and at least 9,800 people in Northern Ireland shoot live quarry, clay pigeons or targets. While acknowledging that wildfowling is a small segment of the market, it is thought to contribute to NI's appeal for specialist visitors, although numbers and value would be considered modest.</p>
Walking	<p>There is limited statistical data available for the number of people who walk or hike and their satisfaction with the facilities available in the Lower Bann corridor. The most significant factors limiting the development of a quality walking product along the Lower Bann is the absence of through-routes along the river length and – in common the rest of NI - countryside access and liability.</p> <p>Provided visitors know where to go, then short walks (say, from the car) are available along the banks of the Lower Bann, including in woods or forests.</p> <p>2013 market research by Fáilte Ireland into the walking market identified that “Promoting Ireland as an activities destination is about using Ireland’s unique selling point in the same way as for general marketing; the activity is a means of enjoying the Ireland experience.”</p> <p>The implication for the Lower Bann is that while some visitors will be motivated to visit specifically for walking or hiking, the main opportunity is for the destination to be promoted and walking or hiking presented as an activity that can be undertaken once here. As with other outdoor activities, issues of constraints on countryside access can be off-putting to visitors and clear directional signage and information about accessible routes need to be available.</p>
Water sports and boating activities	<p>The RYA and partners survey annual “any boating activities”³⁸ and waters ports activity³⁹</p>

³⁶ <https://basc.org.uk/northern-ireland/>

³⁷ <http://www.shootingfacts.co.uk/>

³⁸ Covers 12 core activities Small sail boat racing, other small sail boat activities, yacht racing, yacht cruising, power boating, general motor boating/cruising, canal boating, canoeing, rowing/sculling, windsurfing, water skiing & wakeboarding, using personal watercraft

³⁹ Which includes surfboarding, body boarding/ paddle boarding, kitesurfing, angling, cliff climbing, coastal walking, leisure time at the beach, outdoor swimming, leisure sub-aqua diving, coastering

Recreation and Tourism participation by activity	
	<p>Participation in any of the activities was estimated at 26.8% or 13.1m UK adults. The trend is on the ascendant. Participation in boating activities alone has stayed at a similar level to last year at 7.1% of UK adults, or 3.5m UK adults.</p> <p>Other results:</p> <ul style="list-style-type: none"> • An estimated 7.3m spent general leisure time at the beach • Overall the participation rate for ‘any activity’ in 2014 stands at 26.8% of UK residents. This represents an estimate of 13.1m people <p>Participation rates among Northern Ireland residents continue to be at a far higher level than anywhere else in the UK. Other relevant participation rates for the Lower Bann are:</p> <ul style="list-style-type: none"> • Canoeing participation rate continues to rise and has now reached a high of 3.1% participation (contributes a volume of 1.5m people). This represents the largest participation among the activities that constitute “any boating activity”. In NI the participation rate is 4.1% • Motor Boating/Cruising participation was estimated at 1.1% of the UK adult population (1.8% of NI population). • Water skiing & Wakeboarding 0.7% (1.2% for NI) • Rowing/Sculling 0.8% (1.3% for NI) • Windsurfing 0.4% (too low to record for NI) • Surfboarding 1.4% (3.7% for NI) • Angling 2.1% (5.9% for NI)
Wildlife Tourism	<p>In the US, observing, feeding, or photographing wildlife was enjoyed by 71.8 million people (+16 years age) in 2011. Of this group, 22.5 million people took trips away from home for the purpose of enjoying wildlife while the total value of the sector was estimated at \$110billion⁴⁰.</p> <p>In 2010 MINTEL/TOLUNA estimated that of the <u>domestic</u> tourists surveyed, some 8% of tourists took a break in NI, with wildlife being the main purpose of their visit. A further 8% participated in wildlife activities while they were on a break.</p> <p>Bird watching is just one of the core activities within wildlife tourism. The RSPB has over 1 million members in the UK (approximately 10,000 in NI) and has an interest in the Lower Bann because of species found there, especially overwintering birds at Lough Beg and at the estuary.</p> <p>But on the estuary, species of porpoise and seals have been seen while further out to sea minke whale and bottlenose dolphin are regularly spotted. The net economic impact of wildlife tourism in Scotland was estimated in 2010 at £65 million, with 2,763 FTE jobs.</p>

⁴⁰ U.S. Fish & Wildlife Service - 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation

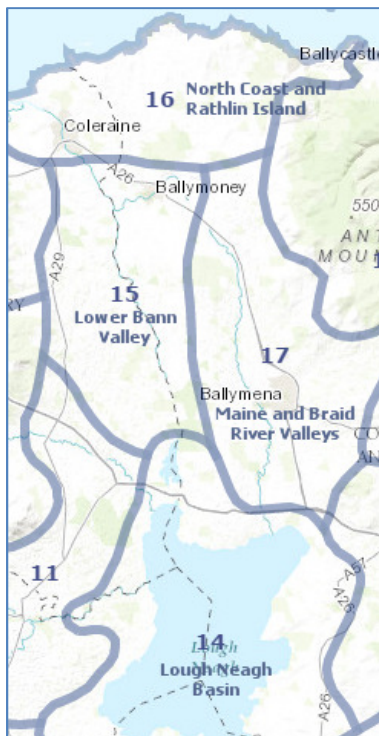
6 Identifying sensitivities along the Lower Bann

6.1 Existing Landscape Character Areas - Northern Ireland Regional Landscape Character Assessment (2015)

In 2015, the Northern Ireland Regional Landscape Character Assessment was launched to provide a regional overview of landscape character. The NIRLCA provides a strategic view of the landscape and divides Northern Ireland into 26 discrete areas, referred to as regional landscape character areas (RLCA). Each of these areas is a recognisable landscape, with its own distinct character and sense of place.

The River Bann is covered by the following NIRLCAs:

Figure 1: NIRLCA's



Lough Neagh Basin (14) - a vast sheet of water surrounded by very low-lying, often boggy land. The area includes the adjacent Lough Beg. The lough fringes include high quality farmland as well as development.

Lower Bann Valley (15) - The broad valley of the Lower Bann extends from Lough Neagh northwards to Coleraine, where the river becomes tidal and the landscape coastal. The valley marks the 'Bann Divide' between Antrim and Londonderry. The valley is visually and physically defined by the ridges of Binevenagh to the west and Long Mountain to the west.

North Coast and Rathlin Island (16) - The north coast is famous for the Giant's Causeway, but includes a wealth of dramatic basalt cliffs and headlands, as well as sandy bays and picturesque villages. Rathlin Island and the fishing villages have their own distinct character, and the area is a popular holiday destination for visitors from Northern Ireland and beyond. Also included in this area are the tidal parts of the River Bann, and the shallow valley of the River Bush.

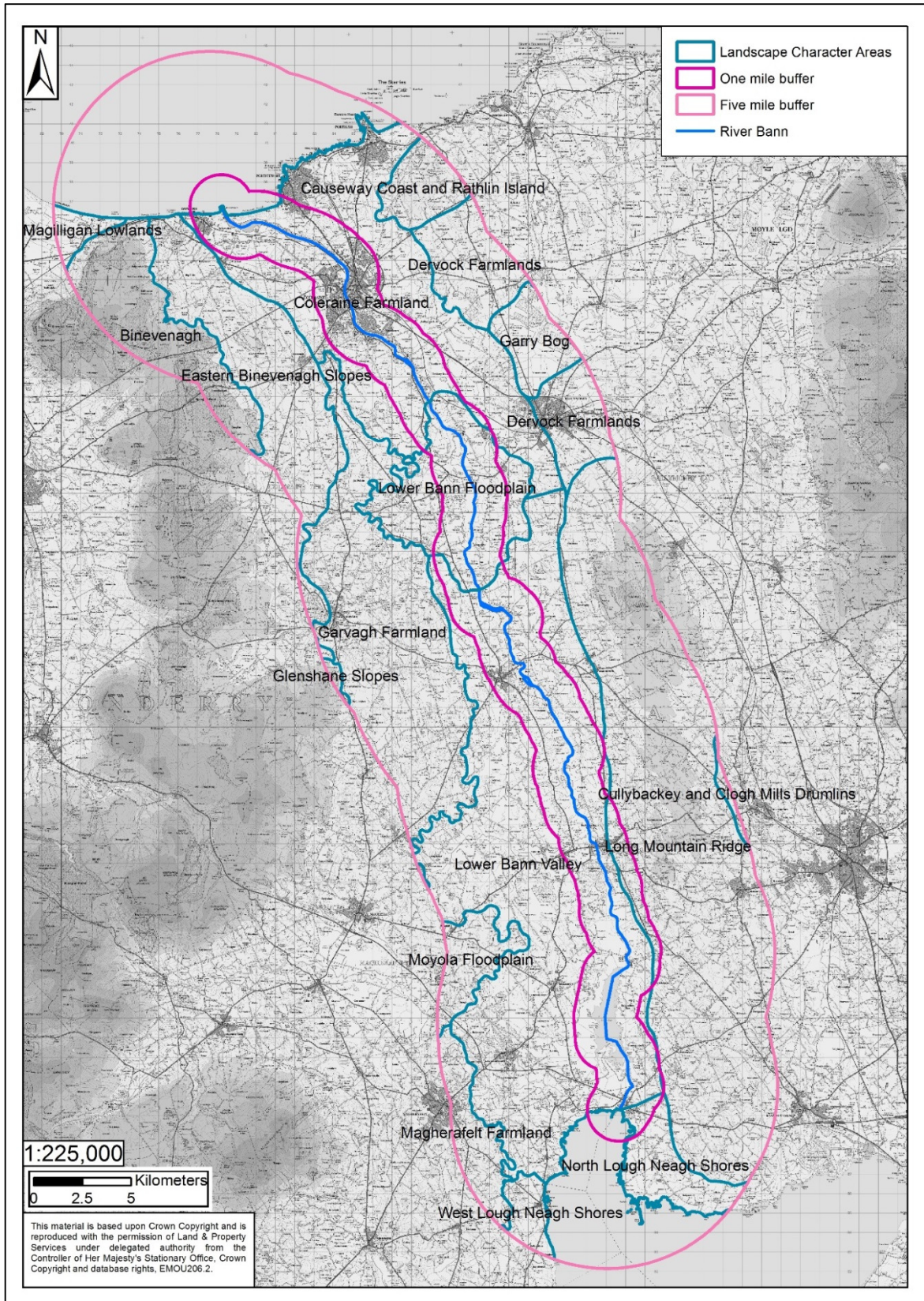
Further detail on the regional landscape character areas can be seen in Appendices 2 and 3.

Existing Landscape Character Areas - Landscape Character Assessment (1999)

Northern Ireland is covered by an existing LCA that was published in 1999. This study was carried out at a detailed scale and defined 130 separate landscape character areas. Each area was based upon local patterns of geology, landform, land use, cultural and ecological features. For each LCA, the key characteristics were described and an analysis of landscape condition and its sensitivity to change was made. The NIRLCAs (described above), provide an update to the local-scale assessments that made up the 1999 study, the details of which in relation to the River Bann can be seen in below. Full descriptions of the LCAs can be seen in Appendix 3, and LCA sensitivities and principles for accommodating new development can be seen in Appendix 4.

These highlight the areas where development might be best accommodated and what the principles are for accommodating new development. The detailed development opportunities and sites are catalogued in sections 7.2 and 7.3 below.

Figure 2: Landscape Character Areas in relation to the River Bann



6.2 Visual Landscape Categories for the Lower Bann

In addition to the existing Landscape Character Areas and Assessments, a series of detailed Visual Landscape Categories (VLCs) were identified within the study area. These are areas with similar visual qualities with regard to topography, land use and existing vegetation cover. The landscape was categorised following site surveys and a desk top study of the aerial photography of the study area. The VLCs have been defined within the confines of this study and do not constitute a formally designated landscape. The boundaries of the VLCs reflect the changes in visual and land use category on the ground.

Figure 3 through to Figure 8, below, show the VLCs that were identified along the length of the River Bann, the ID number of which directly correlates with individual VLCs as listed in Appendix 3, which contains a brief assessment description of each VLC, along with an image to illustrate each VLC. Each VLC was also assigned a sensitivity category as follows: High, Medium or Low; which reflects the individual VLCs sensitivity to development in relation to the existing landscape features. The table below summarises VLC categories and the associated sensitivity level.

Table 5: VLC Categories and associated sensitivity levels

VLC Category	VLC description	Sensitivity level
VLC1	Low lying ground	High
VLC2	Woodland with recreation	Medium
VLC3	Industry	Low
VLC4	Settlement	Low
VLC5	Agriculture	Medium
VLC6	Woodland	Medium
VLC7	Peatland (cut over)	Medium
VLC8	Rush pasture	High
VLC9	Recreation	Low
VLC10	Agriculture screened	Low
VLC11	Low lying screened	Medium
VLC12	Low lying coastal	High

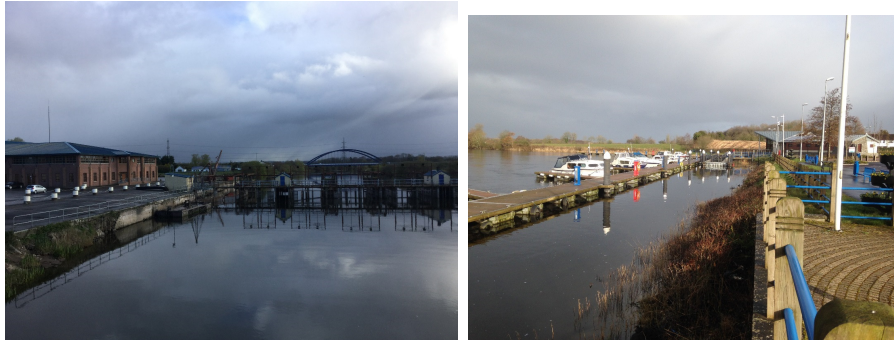
The following definitions are to be applied to each sensitivity rating:

High: Areas of flat, low lying land with little or no screening vegetation and areas of open land which are visible from a distance. Little or no other development will be visible within the landscape. Development within an area of high sensitivity is possible, but a demonstrable or strategic need for development should be presented.

Medium: Areas of relatively flat land with field boundaries and sporadic trees and scrub screening the landscape from the river, including pockets of woodland. Development is acceptable in these areas as long as it is sited and designed sensitively.

Low: Areas of existing industry, settlement, recreation or agriculture screened from the river by trees/scrub, where further development is acceptable. Such areas are capable of accommodating further development without significantly affecting the existing landscape character.

Areas of low visual sensitivity are those within existing settlements or areas of industry, or areas of existing recreation hubs where the landscape is designed, or areas of agriculture that are screened from the river. Sites such as these can accommodate additional development through careful site selection and considerate design of the proposed development. Below are examples of areas of low landscape sensitivity along the River Bann at Toome and Portglenone which could absorb additional development without significantly affecting the existing landscape character.



Areas of medium visual sensitivity are those dominated by agriculture, which can generally be said to be an improved grassland habitat. Woodland pockets and smaller areas currently used for recreation also qualify as a landscape that has a medium sensitivity to new development. Below are some examples of areas of medium landscape sensitivity at Toome and Kilrea which could absorb additional development without significantly affecting the existing landscape character.



The most sensitive areas are those with little or relatively little evidence of human impact, particularly those that are very low lying with little or no vegetation screening to divide the landscape. Development in such landscapes is achievable, but a demonstrable or strategic need should be established before proceeding with development. Any development should be within the confines of existing landscape designations and all appropriate consultations and permissions should be sought. Below are some examples of areas of high landscape sensitivity at Toome and Ballywoollen.



Figure 3: Visual Landscape Categories – Section 1

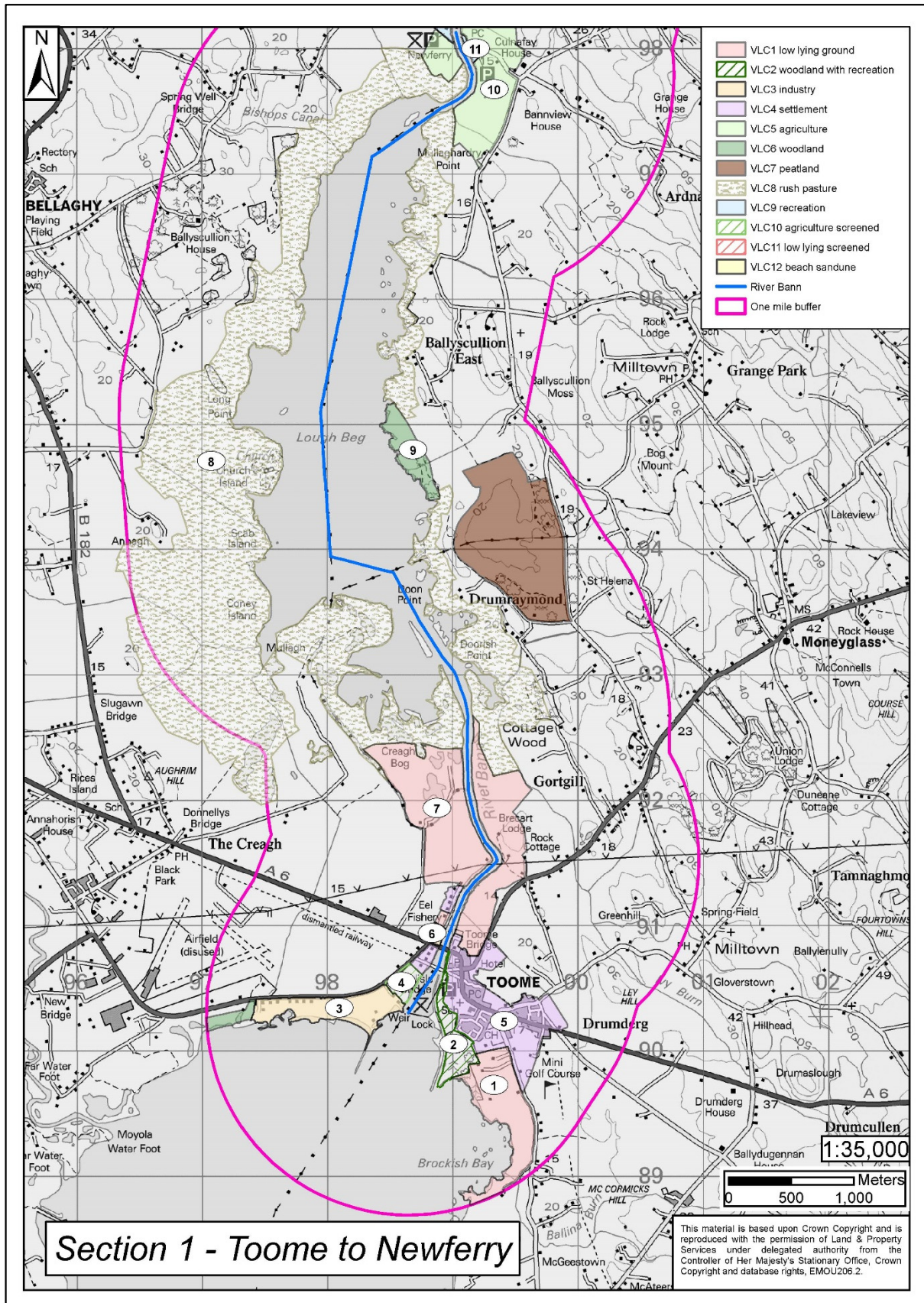


Figure 4: Visual Landscape Categories – Section 2

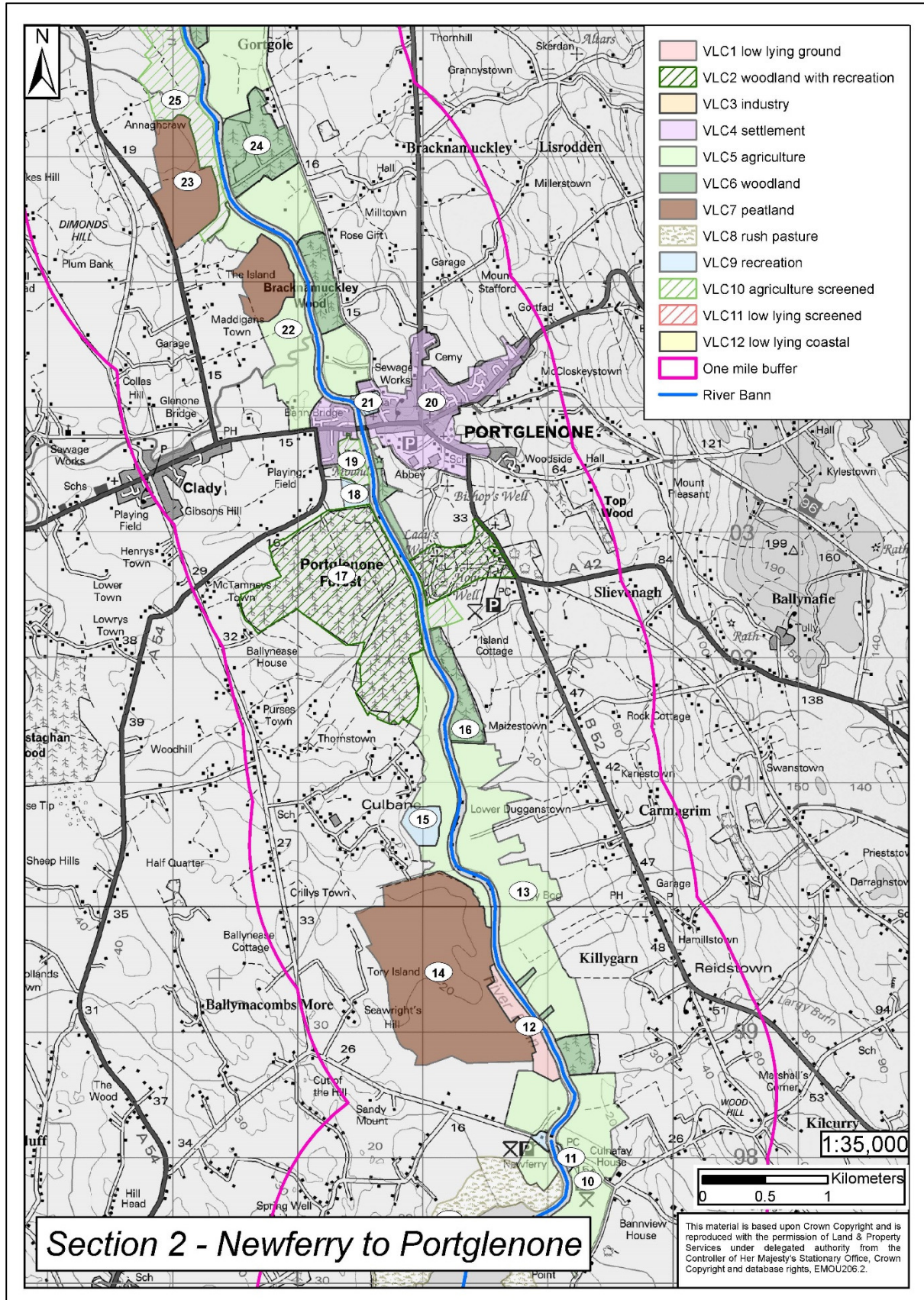


Figure 5: Visual Landscape Categories – Section 3

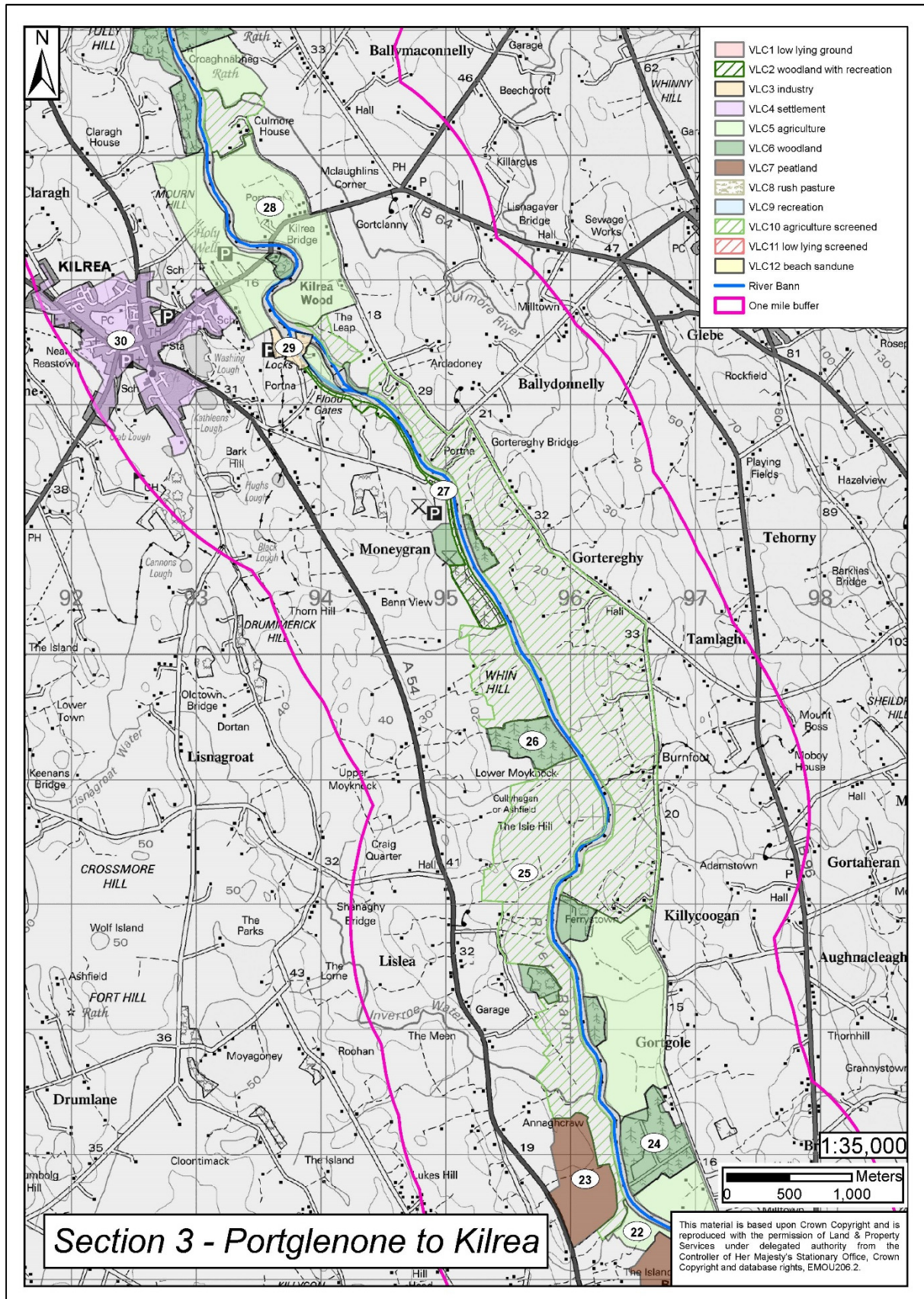


Figure 6: Visual Landscape Categories – Section 4

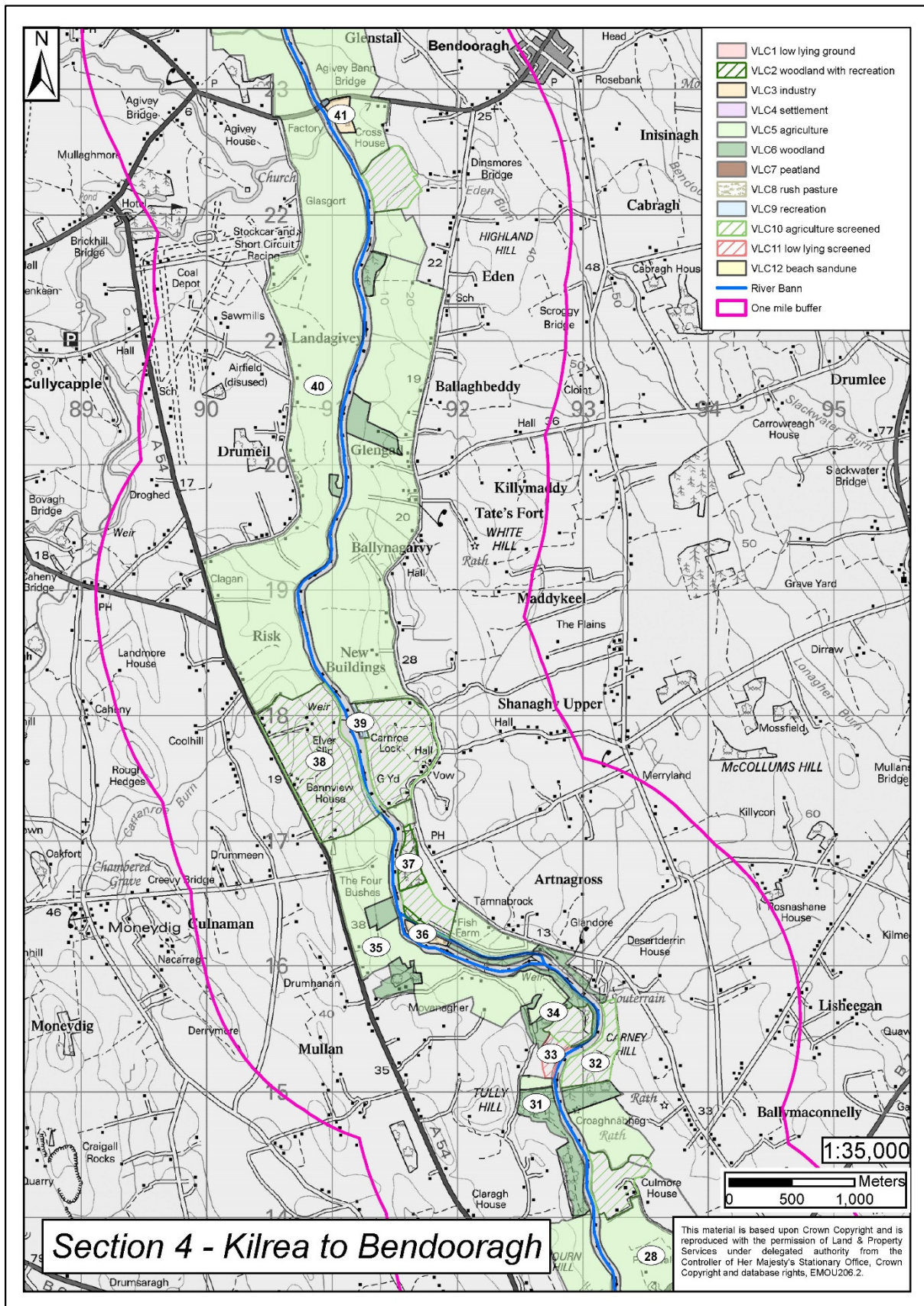


Figure 7: Visual Landscape Categories – Section 5

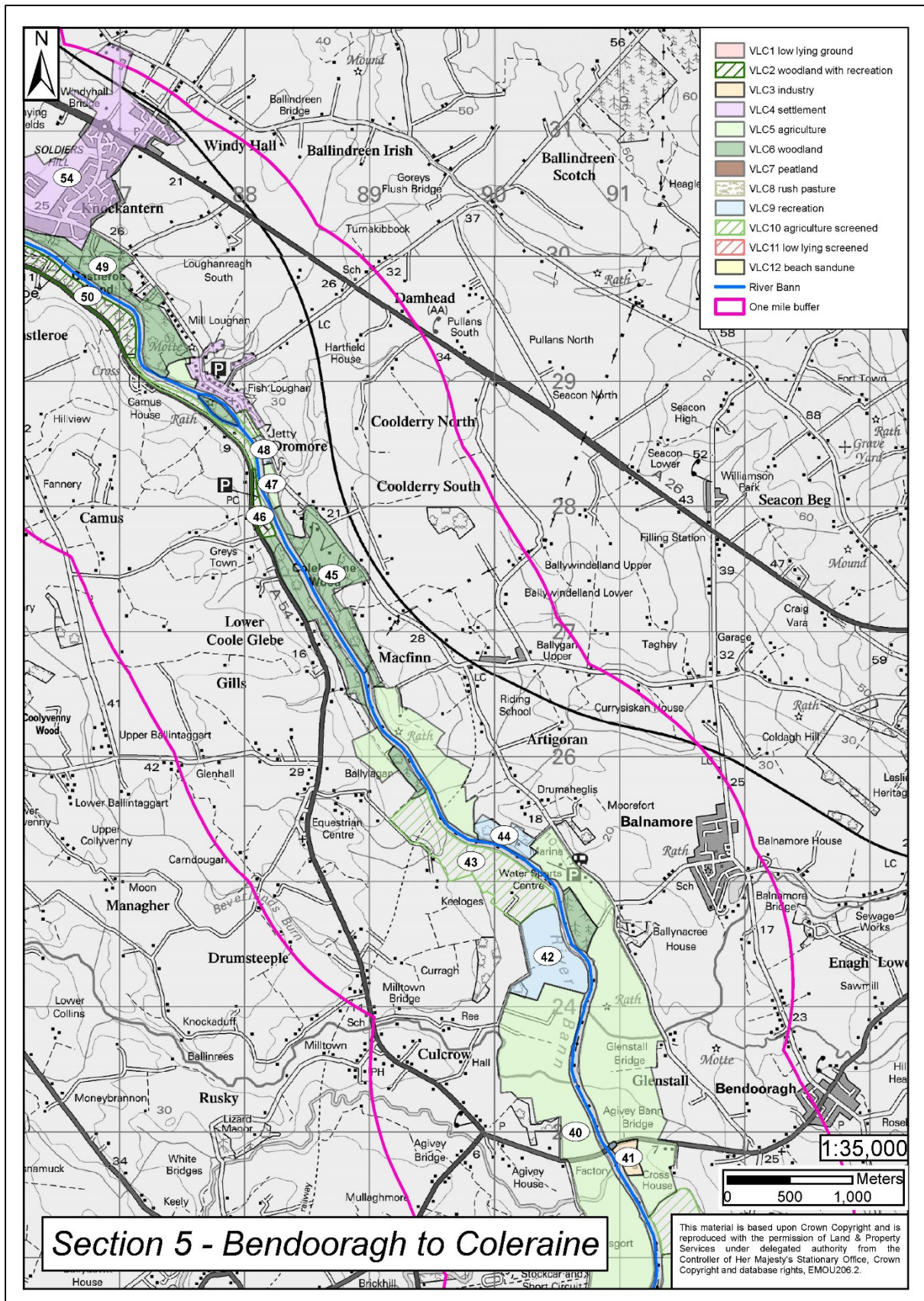
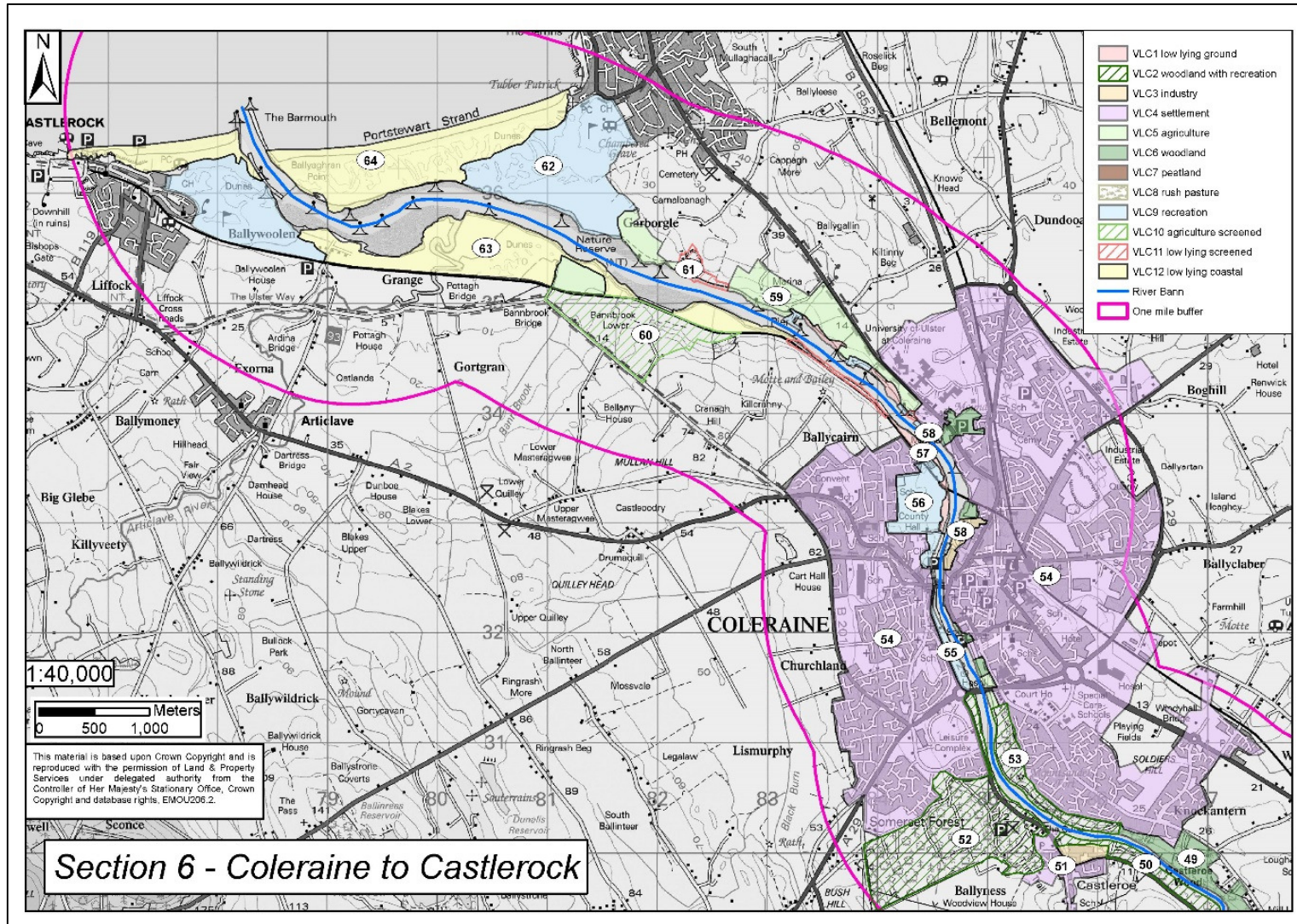


Figure 8: Visual Landscape Categories – Section 6



6.3 Natural and Built Environment Sensitivities

6.3.1 Natural Environment

Overview

The natural environment within which the River Bann sits is rich in biodiversity and can be divided into three distinct zones – Lough Beg, the river channel itself and then the Bann Estuary and coastal regions at Ballywoollen.

Lowered water levels along the Bann have helped to create an area of wet grassland on the west shore of Lough Beg, which is grazed but has not otherwise been agriculturally improved, and the majority of the Lough is less than 2m deep. This wet grassland is largely flooded in winter providing habitat for wintering wildfowl and as the winter floods recede the wet grassland supports large numbers of breeding waders (redshank, lapwing, curlew, snipe and occasionally dunlin). In spring and autumn Lough Beg is important for migrating birds to rest and feed on their way through.

The Lower Bann channel itself has been modified over the years and has become a uniform channel rather than a naturalised channel. Woodland historically has been cleared from the river banks. The ‘Bann Woods’ located along the length of the river, are owned by Forest Service NI, and provide pockets of woodland along the length of the river. The rest of the river channel is characterised by an open agricultural landscape, which the majority of is managed as pasture. Cut-over raised bogs are also located along the river’s edge on the Lough Beg to Portglenone section, the largest of which is Ballymacombs More. Cut over and drained bogs offer a lower biodiversity value than those that have not been affected by drainage or that have been restored.

The Bann Estuary from the Cutts Weir to the sea is tidal. The urban section of the estuary at Coleraine supports some reedswamp and woodland fringe but, as the channel widens in the middle part of the estuary, larger reedswamps appear. There are areas of mudflat and marsh and sand dune systems on both the Castlerock and Portstewart sides, which are important both in terms of biodiversity and landscape value. The estuary is used by commercial boats, for angling, water sports, and informal walking along its edge. The Bann Estuary is important for birds especially wintering waders and wildfowl that mostly feed on the mudflats and roost on the shore. Each spring and autumn large numbers of birds pass through the Lower Bann corridor linking to either Lough Neagh or wetlands and coastal areas further south in Ireland or mainland Europe.

Protected Sites

For this study, the locations of sites that have been designated for their nature conservation value have been mapped in order to highlight their location with regards to the River Bann. The location of designated sites and key habitats and species, has been used in conjunction with the VLC sensitivities identified in Section 6.2, resulting in comprehensive maps that give a full overview of the sensitivity of the landscape to development in relation to the Lower Bann.

Protected sites located within a 5-mile radius of the River Bann can be seen in figure 9, which gives an overview of site numbers and their selection criteria. Full detail of the reasons for the designation of the sites can be seen in Appendix 6. Sites that are of international importance include Special Areas of Conservation (SAC), Special Protection Areas (SPA) and Ramsar sites (designated for their wetland value). Sites of national importance include Areas of Outstanding Natural Beauty (AONB), Area of Special Scientific Interest (ASSI) and National Nature Reserves (NNR). Sites of local interest include Sites of Local Nature Conservation Importance (SLNCI). Some sites qualify under several designations due to the presence of indicator habitats or species.

Figure 9: Natural Heritage designated sites in relation to the River Bann

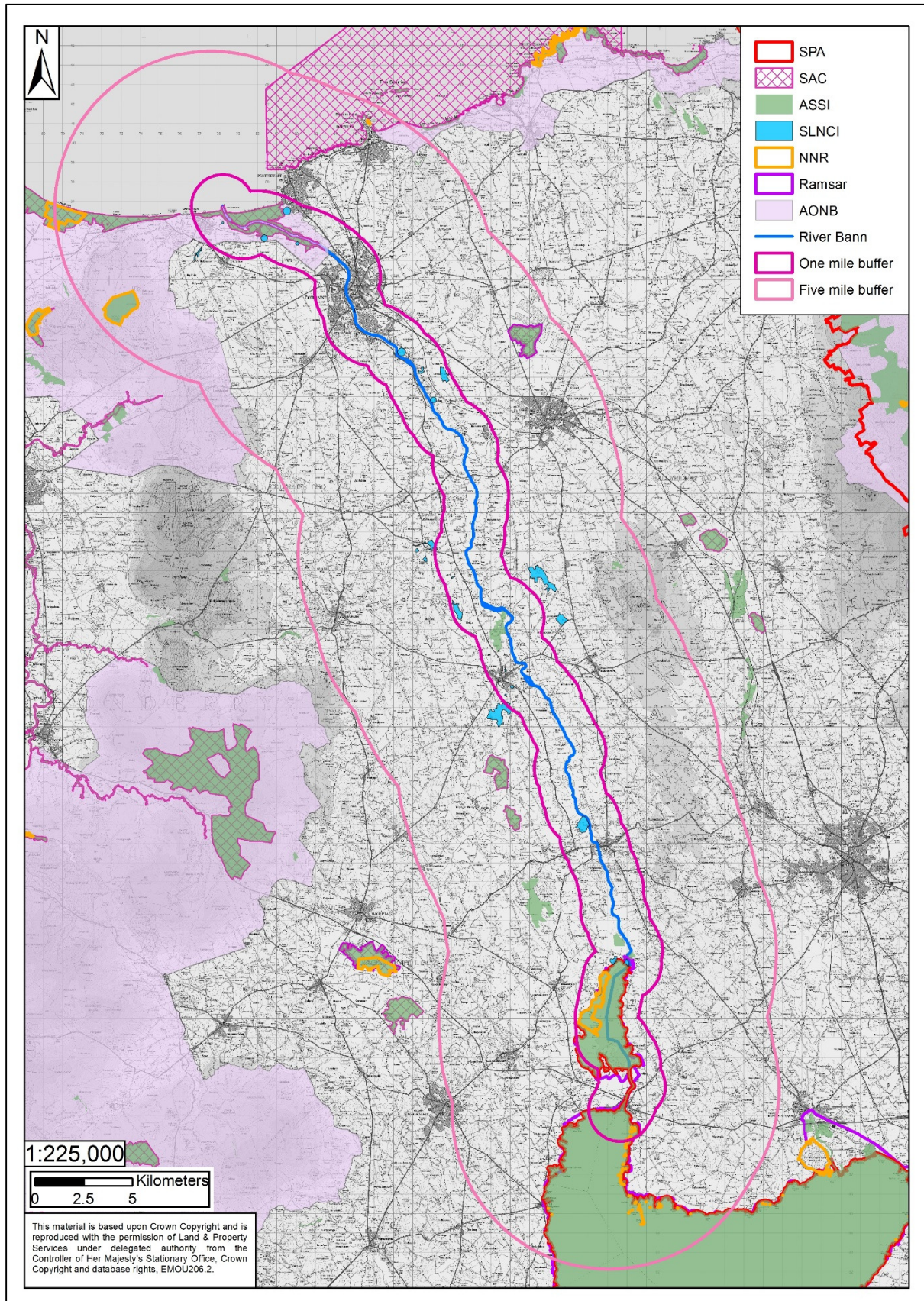


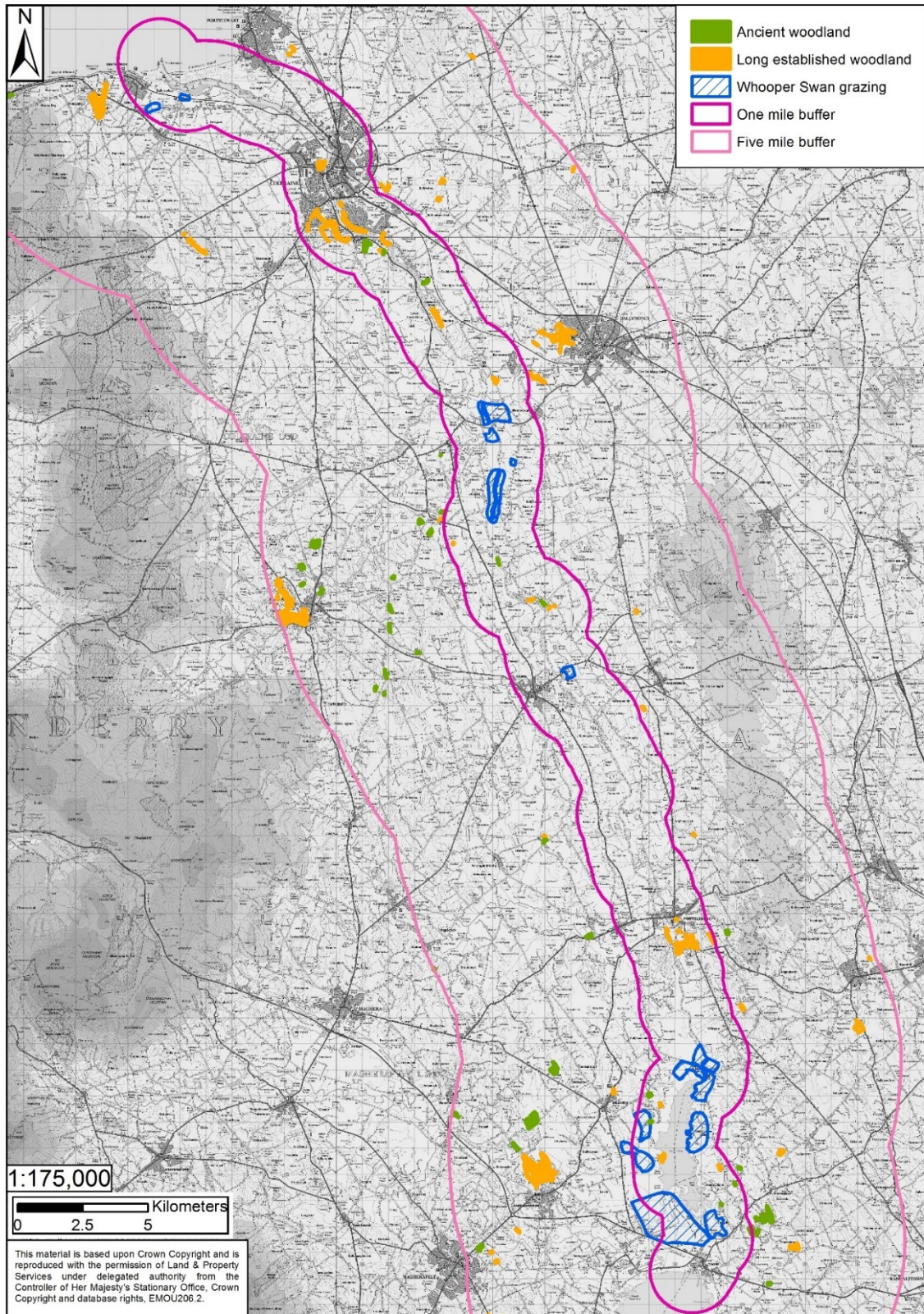
Table 6: Overview of designated natural heritage sites within 5 miles of the River Bann

Designation	Number of sites	Total area (ha)	Typical designation features
SPA	1	40835.53	Seabird and wetland bird assemblage of international importance
SAC	6	12595.50	Active raised bogs, fixed coastal dunes, Atlantic salt meadows, sandbanks, reefs, sea caves, Harbour porpoise, Marsh fritillary butterfly, petalwort
Ramsar	2	50320.60	Natural wetland, supports an appreciable assemblage of rare or vulnerable species, assemblages of international importance, large intact lowland raised bog
NNR	2	328.07	Migrating birds, breeding waders, upland birds, wet grassland, intact peat, rare plants, blanket bog vegetation
ASSI	14	42754.77	Submerged aquatic vegetation, species-rich damp grassland, reedbeds, islands, fens, marginal swampy woodland, pasture, cut-over bog, basalt rock outcrops and boulders, mobile sandy shore, sand bar development, sand dune system, vascular plants, unimproved meadows, lowland raised bog, blanket bog, acid grassland, dry heath, deglacial land form assemblage, species-rich wet grassland, sand dune systems, bog vegetation, rare invertebrates, Irish Red Data fish species, internationally important numbers of waterfowl, diatomites
AONB	2	20807.09	Binevenagh and Causeway AONBs natural, cultural and built heritage
SLNCI	23	Not known	Wet grassland, semi-improved damp rush grassland, quality woodland, intact bog, wet Birch woodland, bryophyte assemblages, dune grassland communities, oak woodland, lake vegetation
Total	50	167641.56	

Key Sites

Key sites within the study area that do not qualify under a statutory designation include ancient woodland, long established woodland and areas of wet grassland that are used by Whooper Swans for grazing purposes. Figure 10 shows these sites and their location in relation to the River Bann. Again these sites may overlap with an area covered by a statutory designation, as previously discussed. Areas of ancient woodland and long standing woodland are highly valuable habitats due to the variety of species supported by these ecosystems. Wet grassland used by Whooper Swans is also a key habitat, which is characterised by low-lying semi improved and improved grassland that is liable to inundation, which provides valuable grazing habitat for overwintering birds. Although the boundaries of key sites are not covered by legislation in their own right, they are areas that are of high biodiversity value and as such, any development proposed for these areas should be carefully considered.

Figure 10: Key non-designated natural heritage sites along the River Bann



Key Species

Fish

The Lower Bann is an important conduit for migrating eels and salmon. The river also has populations of roach, bream and pike. There are brown trout in parts of the main channel and all the tributary rivers. Sea trout and grey mullet also occur in the Bann Estuary. The fishing rights for both commercial netting and angling on the Lower Bann and the tributary rivers belong to The Honourable Irish Society. The eel fishing rights along the river belong to the Lough Neagh Fishermen's Co-operative Society Limited as far downstream as the Cutts, and in the estuary they belong to The Honourable the Irish Society. The Fishermen's Co-operative harvest as many of these silver eels as possible using fixed eel traps at Toome, Portna and Movanager.

Salmon ascend the Lower Bann between May and October with a peak in June and July to reach spawning beds in the head waters of the tributary rivers of the Lower Bann and the feeder rivers of Lough Neagh. Angling for game fish is especially popular on the Lower Bann, with Carnroe, Portna and Culiff Rock attracting premium prices for permits from tourists as well as local anglers. At Newferry, Portglenone, Kilrea and Movanager coarse anglers can catch remarkably good weights of roach and bream. These venues are popular as match venues and represent an important tourism resource. There are two fish farms on the river. Department of Culture Arts and Leisure, Inland Fisheries operate a fish farm at Movanager and there is another privately owned one at Portna. Because of their sensitivity to water quality these act as good monitoring and early warning systems for incidents on the river.

Whooper Swans

Whooper Swans are an Annex 1 species in the EC Birds Directive, and are a Priority Species within Northern Ireland. The Lough Neagh and Lough Beg wetland complex is ranked among the top five most important sites for whooper swans *Cygnus cygnus* in Britain and Ireland, Lough Neagh/Beg combined currently hold around 1,000 birds in mid-winter, peaking in January and again in March. The birds congregate at freshwater roost sites on Lough Neagh and Lough Beg at night and then disperse to forage for food during the day. Although whooper swans also use the shallow waters around the edges of the two loughs, the principal feeding sites for the species are predominantly improved grassland habitats found nearby with at least 2350 hectares of farmland around Lough Neagh and Lough Beg thought to be used regularly each winter by whooper swans. Around Lough Beg, the Newferry area is frequented from December onwards with around 120 birds. On the west shore of Lough Beg, up to 200 birds often gather in the marshy shoreline near Church Island each winter and, later, on agriculturally improved grassland near Annagh and Ballyscullion House. The Creagh lies to the south of Lough Beg and forms one of the most extensive areas of flat low-lying grasslands in the area and is by far the most important site in the entire Lough Neagh / Lough Beg area, with between 300 – 400 birds regularly feeding there in winter. The Creagh holds large concentrations of birds from late October onwards.

Bats

The Northern Ireland Bat group were able to provide records for the following bat species along the River Bann: Soprano pipistrelle *Pipistrellus pygmaeus*, Common pipistrelle *Pipistrellus pipistrelles*, Leisler's bat *Nyctalus leisleri*, Daubenton's bat *Myotis daubentonii* and Nathusius' pipistrelle *Pipistrellus nathusii*. These records were supplied by volunteer bat surveyors and may not represent a complete snapshot of the 10 bat species that can be found in Ireland. In terms of preferred habitats used by bats,

semi mature and mature deciduous trees used for roosting and tree and scrub lined water’s edge and hedgerows, are perfect for bats – the River Bann channel provides these habitats in abundance.

Otters

The Centre for Environmental Data and Recording (CEDaR) was able to provide records for Otters *Lutra lutra* at 34 locations along the River Bann, ranging from Lough Neagh to Ballywoollen. Otters are an Annex II European protected species and a Northern Ireland priority species.

The otter is a semi-aquatic mammal, which occurs in a wide range of ecological conditions, including inland freshwater and coastal areas. Populations in coastal areas use shallow, inshore marine areas for feeding but also require fresh water for bathing and terrestrial areas for resting and breeding holts. Inland populations use a range of running and standing freshwaters. These must have an abundant supply of food, together with suitable habitat, such as vegetated river banks, islands, reedbeds and woodland, which are used for foraging, breeding and resting. Development can cause disturbance or impact directly on their places of refuge or feeding areas.

Red Squirrel

The Centre for Environmental Data and Recording (CEDaR) was able to provide records for Red squirrels *Sciurus vulgaris* at three locations along the River Bann. The Red squirrel is a protected species under The Wildlife & Countryside (Northern Ireland) Order 1985 (as amended). The habitat type associated with Red squirrel is coniferous and broadleaf woodland, again highlighting the importance of retaining and expanding woodland cover within the vicinity of and adjacent to the river.

6.3.2 Built Environment

Overview

The Historic Environment Division in the Department for Communities has responsibility for State Care sites and monuments regulated under the Historic Monuments and Archaeological Objects (NI) Order 1995. The Division also co-ordinates the recording, protection and conservation of historic parks, gardens and demesnes, as well as scheduled monuments. They have responsibility for many sites and properties throughout Northern Ireland, several of which are located within the study area. Table 7 below gives an overview of such sites and Appendix 7 gives further detail as to included sites and reasons for protection. Figures 11, 12 and 13 show areas or sites of built heritage importance in relation to the River Bann.

Table 7: Overview of designated built heritage sites within 5 miles of the River Bann

Protection type	Within 1 mile	Within 5 miles
State Care	2	6
Scheduled Monument	30	72
Parks, Gardens and Demesnes Register	7	12

Protected Sites

State Care Monuments

State Care sites and monuments are those in the ownership or guardianship of Historic Environment Division. They represent all periods of human settlement in Ireland from around 7,000 BC to the 20th century, and include some of the premier examples of monument types in Northern Ireland. Many sites are open to the public, although some may be temporarily closed to allow works to take place. In some cases, at our more remote monuments, public access is not yet available and there is an ongoing programme to provide or enhance access to these sites.

Mountsandel Fort and a motte and bailey (both Coleraine) are the two state care monuments within 1 mile of the river. A quality walk is present within this forest and the Fort is accessible by foot.

Scheduled Monuments

State Care Monuments are selected on the basis of criteria published in Planning Policy Statement 6 (PPS 6): Planning, Archaeology and Built Heritage (1999) and include sites dating from 7000 BC to the 20th century, such as prehistoric tombs, earthworks of all kinds, castles churches, maritime sites, canals and World War 2 defences. There are 30 scheduled monuments within one mile of the River Bann, and include sites such as mounds and raths. It is not known how many of these sites are accessible (unavailable from NIEA upon request). Scheduled sites are overwhelmingly not owned by the Department and access permissions in each specific case would need to be negotiated with each individual landowner(s).

Historic Parks, Gardens and Demesnes

Ornamental parks and gardens in Northern Ireland's country houses and public parks are an important part of the landscape. The Historic Environment Division co-ordinates the recording, protection and conservation of these historic parks, gardens and demesnes. Seven of these sites are located within 1 mile of the River Bann. Benvardeen Walled Garden and Park is open to the public and is well known. Downhill (National Trust Property) has a small garden near the Bishop's gate but it is mostly an open 18th century parkland with classical buildings. The Guy Wilson Daffodil garden in the University of Coleraine grounds is still maintained and can be visited in season. Leslie Hill is a walled garden and farm buildings and park - open to public mainly as a working historic farm. Portglenone has a small arboretum in the grounds in honour of the plant collector Augustine Henry. Moyola Park has a garden but it is not open to the public and Ballyscullion house is a wedding venue with not much present in the way of a garden. Details regarding Anderson Park are not known.

Built Environment Conclusion

In 2013 Waterways Ireland commissioned a survey of the Built Heritage of the Lower Bann Waterways⁴¹ which serves as the basis for plans to develop built heritage trails for the public to follow and view the heritage of the area. This comprehensive survey highlights sites and artefacts that are of archaeological, architectural, artistic, cultural, historical, social and technical interest. Each site was rated according to one of four levels of heritage significance (Negligible, Low, Medium High, the latter of which makes a substantial contribution to the architectural, engineering or industrial heritage of the Lower Bann and is of regional or even national significance). There are 36 sites of high heritage merit, which include many industrial and navigation sites - all the locks and weirs, flood gates and lateral canals at the Cutts,

⁴¹ Built Heritage Survey of the Lower Bann Waterway, Fred Hamond, December 2013

Carnroe, Movanagher, and Toome and the quay at the Cutts. Other highly significant sites include moles, former fords, bridges and the eel fisheries at Toome, The ecclesiastical sites at Camus and Church Island on Lough Beg are also of outstanding heritage value, together with Ballyscullion Demesne and the ruinous remains of the Bishop's Folly. In spring 2014 Waterways Ireland also committed to a renovation scheme for Toome lock house, to create orientation facilities for visitors.

6.4 Assessing Natural and Built Environment Development Potential

The information on the natural and built environment, and visual landscape considerations have been brought together in a series of maps (Figures, 10, 11 and 12) to give an overview of the sensitivities of the landscape within which the River Bann flows. With specific regards to natural and built heritage sensitivities, the following recommendations should be adhered to:

- Any developments proposed to be located where habitats designated as being of importance at a European level, or sites where species of European Importance are known, should show a demonstrable or strategic need for development. The appropriate permissions should be sought and mitigations implemented where necessary
- Any developments proposed to be located where habitats designated as being of importance at a national or local level, or sites where species of national importance are known, should carefully consider the reasons for designation of the site and reflect this in the proposal. Again appropriate permissions should be sought and mitigations implemented where necessary
- Where possible, proposed developments should be located in areas where existing settlement or recreation development has taken place, in order to minimise habitat disturbance
- Habitats should not be fragmented, and where possible, development should seek to further enhance the natural riverine environment within which they are proposed to be sited
- Scheduled Monument Consent (SMC) should be sought from the department where developments are proposed within the vicinity of a scheduled site
- Historic parks, gardens and demesnes by their nature, are a designed landscape and represent different development challenges to that of the natural landscape. Given that the majority are privately owned, effective partnership working will be required to take forward any proposed developments at these sites
- Enhancing visitor numbers to heritage sites (archaeological or environmental) can bring about unpredicted damage to them. The relevant European Conventions and other International Charters that inform heritage work should be adhered to when considering or completing development work

6.5 Landscape and Environmental Sensitivities Overview

The location of designated sites along with key habitats, key species and known sites of built heritage importance, have been used in conjunction with the VLC sensitivities identified in Section 6.2, to result in a series of comprehensive maps. They give a full overview of the sensitivity of the landscape to development in relation to the Lower Bann. Figures 11, 12 and 13 show the result of combining all sensitive landscape indicators.

The following definitions can be applied to each sensitivity rating:

High: Areas of flat, low lying land with little or no screening vegetation and areas of open land which are visible from a distance. Little or no other development will be visible within the landscape. Sites of international, national and local importance in terms of biodiversity are included. Development within an area of high sensitivity is possible, but a demonstrable or strategic need for development should be presented.

Medium: Areas of relatively flat land with field boundaries and sporadic trees and scrub screening the landscape from the river, including pockets of woodland. Key non-statutory sites that are valuable in terms of biodiversity are included within this rating. Development is acceptable in these areas as long as it is sited and designed sensitively.

Low: Areas of existing industry, settlement, recreation or agriculture screened from the river by trees/scrub, where further development is acceptable. Such areas are capable of accommodating further development without significantly affecting the existing landscape character. (It should be noted that sites included within the Parks Gardens and Demesne register are classified as being of low sensitivity due to their nature of being a 'designed landscape', this does not however detract from them being a designated site of built heritage importance).

These categories form the landscape and environmental sensitivities overview of this study and indicate areas both desirable and undesirable for the development of tourism or recreational facilities.

Figure 11: Overview of landscape and environmental sensitivities – Map 1

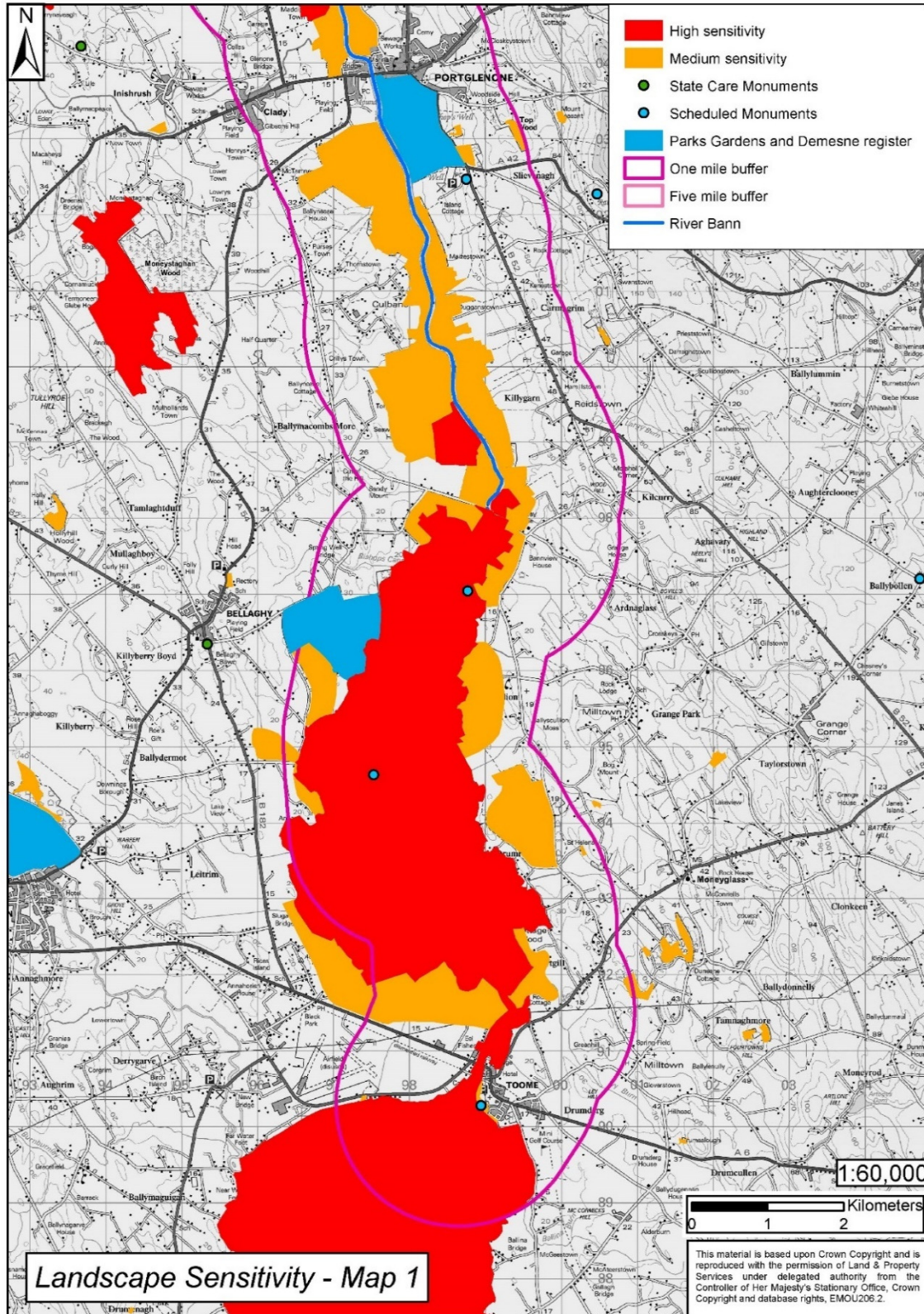


Figure 12: Overview of landscape and environmental sensitivities – Map 2

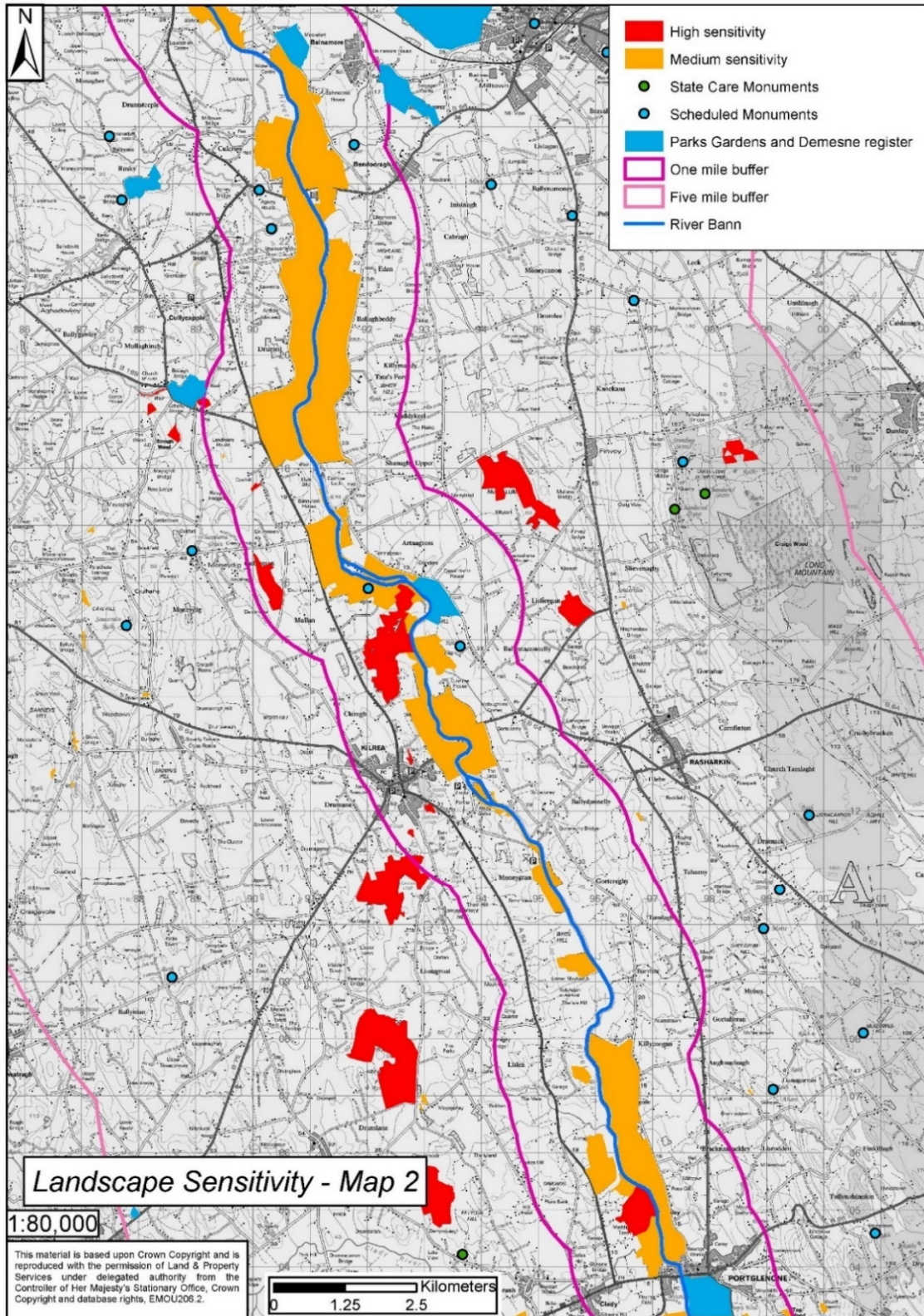
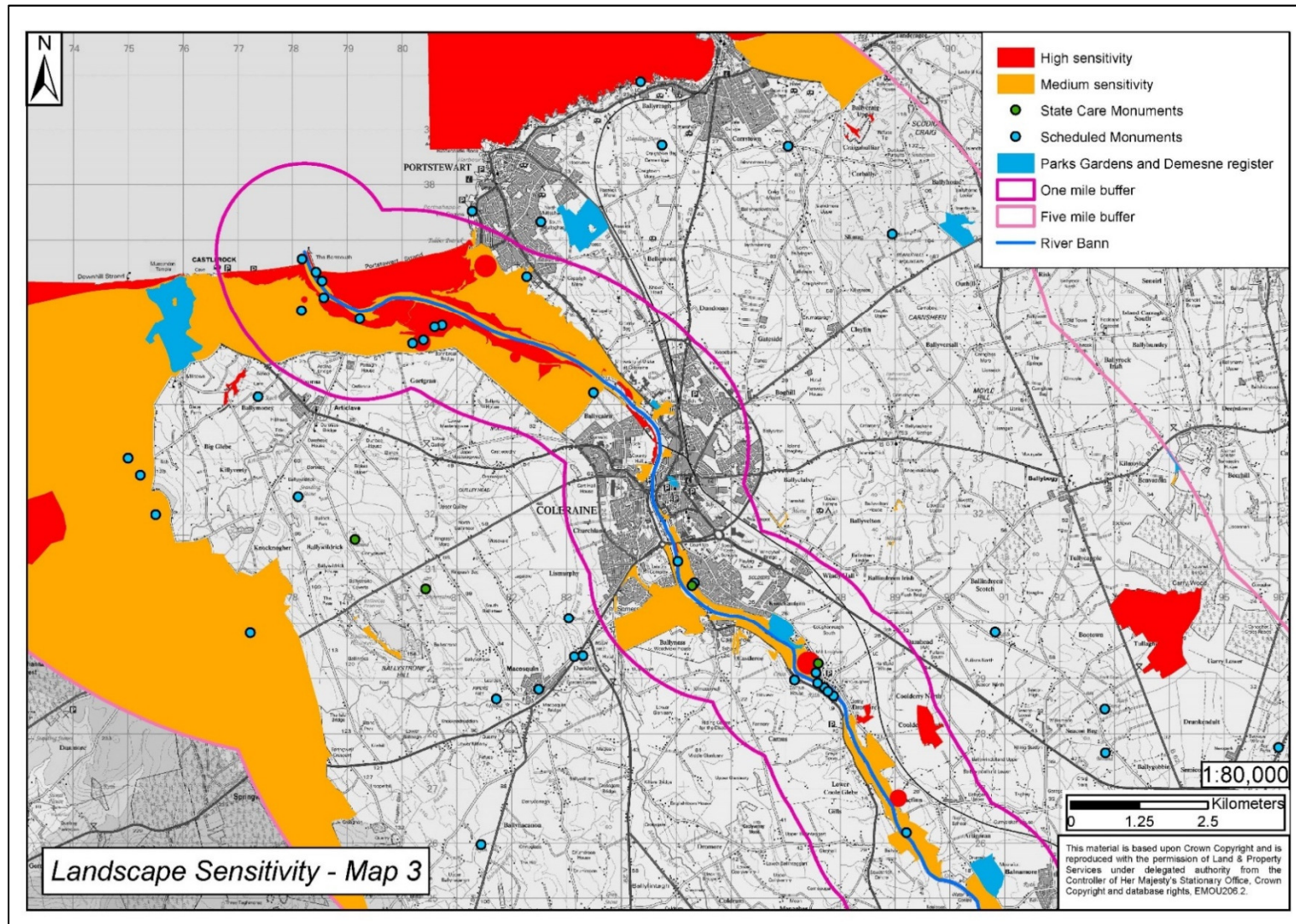


Figure 13: Overview of landscape and environmental sensitivities – Map 3



7 Recreation and Tourism Opportunities in the Lower Bann Corridor

In considering the economic and commercial potential of the Lower Bann as a whole, there is significant scope for enhancing the quality of the recreation and tourism offer through a considered menu of development projects, including reinvigorated and new attractions, as well as environmental enhancements.

Three critical elements are identified in this plan forward:

1. The development of the Lower Bann Blueway, to provide both a basis for marketing and to cohere the slow recreational product offer;
2. Accommodating fast paced water sports (and reconciling these with slower activities on the Lower Bann) and angling activities;
3. Translating these activities into a geographical focus of gateways, hubs and significant sites, which provide a rationale and focus for investment, activity and visitor management

7.1 The Lower Bann Blueway

The opportunity to enjoy the Lower Bann is generally offered through ‘slower’ modes of travel; walking, cycling, horse riding and water-based activities (boating, canoeing etc.), which allow closer and arguably more authentic visitor experiences.

Waterways Ireland has developed the Blueway concept on many of its other waterways. This comprises the development of a multi-activity trail, or trails, running alongside the water which link walking, cycling, canoeing and paddle boarding with local towns and villages. They cater to gentle recreational activity through to adrenaline filled days on land and water

Essential components of the concept are the coordinated and integrated approach to the development and offer of recreation and sport activity on and off the water and the engagement of tourism and recreational businesses and communities, for them to tie in and offer opportunities to users and visitors and benefit commercially.

The concept is a compelling one for both development and marketing purposes and it will have traction on the Lower Bann, once a number of preconditions are met. These relate to the early priorities described under the actions of this report and would be staged over the initial two years of the project, with a launch of the Lower Bann Blueway within the short term, i.e. up to 2019.

The development of the Lower Bann Blueway has a number of stages:

- Address riverside access issues
- Undertake key river and riverside infrastructure as detailed in this report
- Development (where required) of Blueway activities on the Lower Bann and the river corridor – a focus particularly on nature and wildlife watching, cycling and walking products for instance
- Community and private sector engagement to generate and endorse design of the Blueway concept
- Seek funding and undertake marketing actions
- Launch and marketing of the project

7.2 Water sports and Angling

The Lower Bann is popular and has built a positive reputation for both these areas of activity, despite variations in water levels and flows. Crucially too, clubs and water sports operators are important parts of the infrastructure, not just through their knowledge of where to do what, but through their enthusiasm and in some case organisational ability to establish and run relevant events, attract participants and generate goodwill and positive press.

Increasingly some of these events are national and international, helping raise the profile of the Lower Bann further. Waterways Ireland plays a fundamental role in encouraging event organisers and facilitating events, as well as supporting day to day activity on the Lower Bann.

The next section on gateways, hubs and significant sites identifies where water sports and angling can be further supported and encouraged, while at these locations these and “slower” activities can be accommodated and reconciled. The action plan also identifies what actions are needed to encourage these activities.

7.3 Tourism and Recreation Gateways and Hubs on the Lower Bann

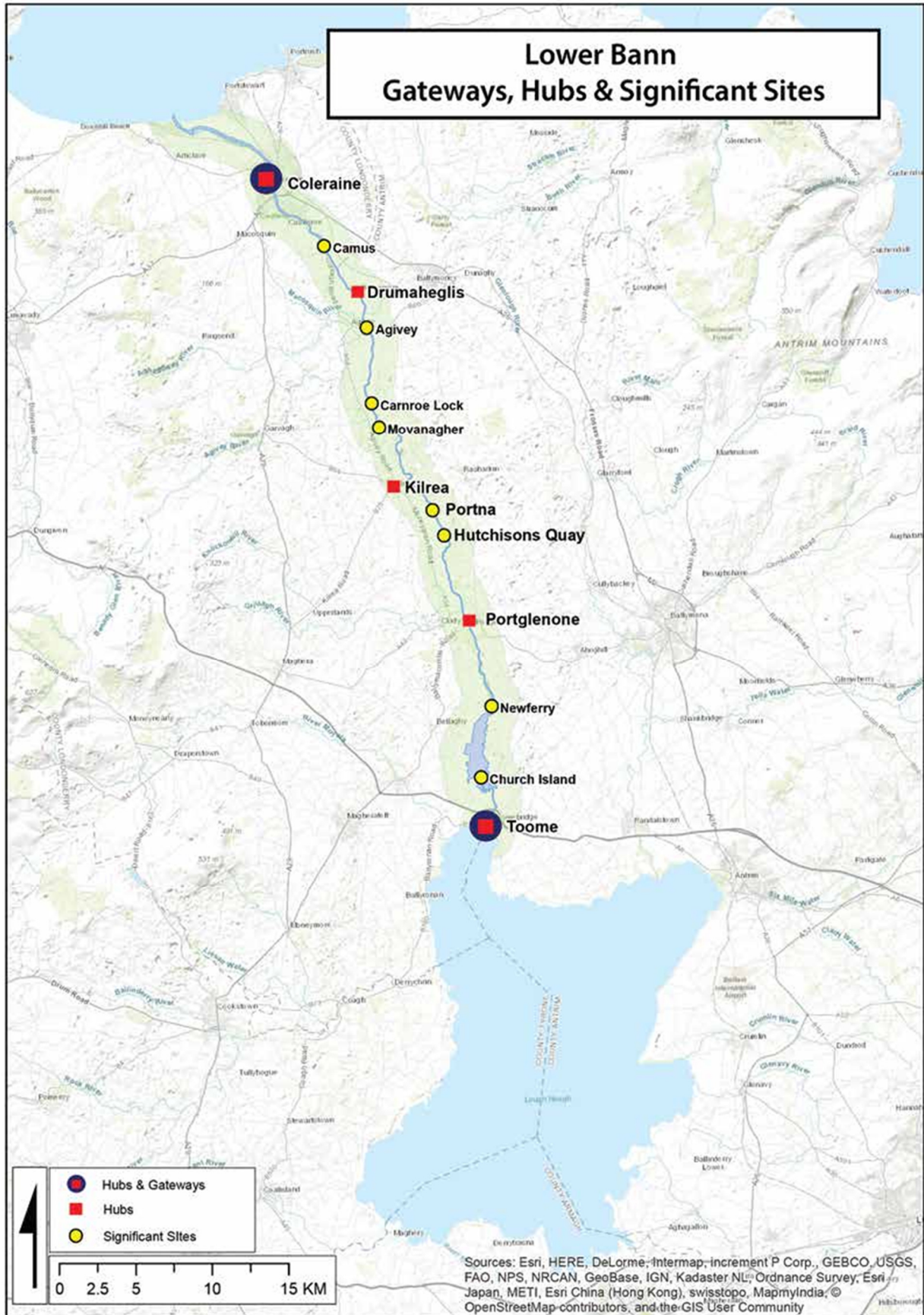
To unlock the full value of the Lower Bann as a leisure and tourism resource, the concept of Gateways, Hubs and Significant Sites is proposed, being clusters of activity which will be used to both attract visitors and users to the Lower Bann and support visitor management. The quality of these clusters will define the overall perception of the Lower Bann.

The gateways are at Toome and Coleraine. The hubs proposed are as follows:

Table 8: Hubs

No	Hub	Attributes
1	Toome	<ul style="list-style-type: none"> • Gateway to/from Lough Neagh • Town services • Lock & Jetty • Lockkeepers cottage/amenity site • Riverside walk
2	Portglenone	<ul style="list-style-type: none"> • Town services • Marina • Major coarse angling facility • Portglenone Wood/ Riverside walk
3	Kilrea	<ul style="list-style-type: none"> • Town services • Portneal Lodge/coarse angling stands • Jetty • Riverside walk
4	Drumaheglis	<ul style="list-style-type: none"> • Caravan site and café • Marina
5	Coleraine	<ul style="list-style-type: none"> • Gateway to/from the sea • Cutts lock • Somerset Riverside Park/ Christie Park/ Mountsandel/ Marinas at Coleraine, Seatons, & Cranagh • Town services • Cranagh activity centre • Riverside walk

Figure 14: Lower Bann Gateway Hubs



The approach to the development of hubs has a number of benefits:

- It identifies and reinforces key accesses with activities which will attract visitation to the Lower Bann
- It introduces rhythm to the Corridor by providing attractions and events at key intervals along the Lower Bann
- Each hub can develop its own character to add to the richness of the on and off water experience
- They provide clearly identifiable focal points, to enable visitors to orientate themselves within the Lower Bann Corridor, whilst facilitating access, parking, stopping off and the development of visitor services
- Concentrations of activity will help to ensure that attractive and dynamic local centres are created/enhanced, which might otherwise be diluted if uses were uniformly spread along the river
- Supports the creation of ‘places’ or destinations along the Lower Bann where people are drawn to spend their leisure time.

The concept of the ‘hub’ is about ensuring there is provision of leisure facilities and amenities in key locations. Building on the underlying principle of ‘joined up provision’ the ambition is to create a template for development based on a number of minimum standards based on core components, these being:

- Adequate mooring and parking provision (good access by road and by water)
- Toilets (male, female, disabled)
- Information and orientation (both site-specific and referring to other hubs)
- Accommodation and associated hospitality services nearby
- Outdoor amenity space
- Signage to and from the hub;
- High quality amenity and design standards
- Changing facilities
- Broadband/ 4G connectivity

Beyond these, a range of complementary facilities may then be added, with the mix of uses tailored to suit existing needs, potential demand and planning/ environmental constraints in each location. Suggested facilities could include cycle hire, boat trips/hire, cafe/ tea room, pub/restaurant, retail (e.g. convenience, outdoor clothing, souvenirs), boaters’ facilities, greater accommodation choice and education/community facilities.

7.4 Tourism and Recreation Significant Sites

In addition to the Hubs, there are several “Places of Interest”, locations along the river where activities take place on and around the river.

The locations are integral to the overall Lower Bann visitor experience and are identified to align the river corridor recreation and tourism offer. Development of these and linkages should complement one another and avoid an overprovision of facilities and amenities.

These might require smaller scale investment (toilets, parking, moorings, kiosks, interpretation) with the linkages to the hubs and local villages promoted.



The sites of significance are as follows:



Table 9: Significant Sites



No	Significant Sites	Attributes
1	Lough Beg & Church Island	<ul style="list-style-type: none"> • Old Church • Seamus Heaney • Environmental interest
2	Newferry East & West	<ul style="list-style-type: none"> • Jetties • Waterski facility
3	Hutchisons Quay	<ul style="list-style-type: none"> • Jetty • Riverside walk
4	Portna	<ul style="list-style-type: none"> • Locks/Jetty & services • Campsite and riverside walk
5	Movanagher	<ul style="list-style-type: none"> • Wild campsite/ glamping • Service facilities • Vow jetty & wood
6	Carnroe	<ul style="list-style-type: none"> • Lock • Toilet • Amenity site/ game angling
7	Agivey Bridge	<ul style="list-style-type: none"> • Parking • Angling
8	Camus	<ul style="list-style-type: none"> • Wood/Car park • Amenity site


There follows is an analysis of the main available infrastructure and services to support tourism and recreation along the Lower Bann at Gateways, Hubs and Significant Sites.



Table 10: Tourism and Recreation Gateway and Hubs


Tourism and Recreation Gateways and Hubs - Locations		
Gateway: Toome		
Existing Facilities	Future Opportunities	Image
<ul style="list-style-type: none"> • Derelict lockkeeper’s cottage • River Walkway • Lock • Slipway • Canoe Steps • Jetty / Pontoon • Eels Centre • Community Centre • Historic Building / ruins • Parking • Public House • Restaurant • Toilets (100 yards) 	<ul style="list-style-type: none"> • Lockkeeper’s cottage conversion to heritage centre and café • Toilet facilities • Changing facilities • Marina development • Marina / Canal civic space • Eels Fishery Visitor Centre • Dedicated walking and cycling routes through village • Urban Waterfront – paving, parking, restaurants • Freestyle international canoeing events at fishpass • Provision of slalom canoe course downstream of sluice gates • Interpretation, Orientation and Public Art • Linkages of walk and cycleways to Lough Neagh and Lower Bann • Developing Game of Thrones tours at Toome Lockhouse • Events and festivals • Starting point and link for heritage trails to Lower Bann and Lough Neagh 	 

Tourism and Recreation Gateways and Hubs - Locations		
Hub - Portglenone		
Existing Facilities	Future Opportunities	Image
<ul style="list-style-type: none"> • Marina / Moorings • Motorhome Stations • Forest Park • River walkway • Heritage Trail • Village proximity to the river • Parking • Children’s Playground • Coarse Fishing Stands • Events e.g. Gig 'n The Bann • Private jetty • Fresh water • Public Houses • Cafés • Shops 	<ul style="list-style-type: none"> • More events and festivals (Angling competitions, water-based events) • Water-based activities for kids • Extending river walk and cycleway • Developing activities in Forest Park e.g. off road cycle trails, picnic facilities, glamping • Linking of walking and cycling routes • Additional Fishing stands to support international fishing competitions at Glenone • Interpretation, Orientation and Public Art • Accommodation development in Portglenone • Changing facilities • Additional moorings at Portglenone • Additional motorhome stations • New footbridge across the river to connect walkways along riverbanks and connect Portglenone and Glenone • Linking of Lower Bann heritage trail and Portglenone trail 	 

Tourism and Recreation Gateways and Hubs - Locations		
Hub - Kilrea and Portneal Lodge		
Existing Facilities	Future Opportunities	Image
<ul style="list-style-type: none"> • Portneal Lodge (derelict) • Fishing stands • Coarse Angling • Pontoons • Canoe Step Access • Restaurant • Public House • Range of catering establishments • Retail offer • Toilets • Parking 	<ul style="list-style-type: none"> • Interpretation, Orientation and Public Art • Changing facilities • Redevelopment of Portneal Lodge into a boutique hotel • Redevelopment of Portneal Lodge into an angling centre of excellence • Linkages of walk and cycleways • Connectivity with Kilrea • Visitor accommodation potential • Game and coarse angling stand development • Develop the Diamond as an attraction in itself • Heritage Trail within the town and link to Lower Bann Trail • Conservation Area Status, to safeguard built heritage and listed buildings • Exploitation of Plantation heritage • Canoe campsite / bothy development at Kilrea Bridge 	 

Tourism and Recreation Gateways and Hubs - Locations		
Hub - Drumaheglis Marina		
Existing Facilities	Future Opportunities	Image
<ul style="list-style-type: none"> • Marina • Caravan & Camping Sites • Glamping Pods • Café • Toilets • Fresh water • River access for canoes and boats • Moorings / Jetty • Parking • Shop • Shower • Disabled access 	<ul style="list-style-type: none"> • Interpretation, Orientation and Public Art • Additional glamping pods • Changing Facilities • Linkages of walk and cycleways • Developing activities in Forest Park e.g. off road cycle trails, Picnic facilities • Outdoor Activity Centre • More toilets showers and laundry facilities • Additional mooring provision • Events promotion • Focus for waterway user education programmes 	 

Tourism and Recreation Gateways and Hubs - Locations		
Gateway - Coleraine - the Cutts & Somerset Riverside Park,		
Existing Facilities	Future Opportunities	Image
<ul style="list-style-type: none"> • Forest Park • Jetty/ Pontoons • Riverside walk • Canoe Steps • Lock Gates • Parking • Derelict laboratory • Fishing huts on weir • Toilets • Public House • Café / Restaurant • Riverside shopping complex • Hotel nearby • Cinema • Restaurants 	<ul style="list-style-type: none"> • Development of laboratory – heritage/Mountsandel interpretation centre, hotel/conference facilities, • Interpretation, Orientation and Public Art • Canoe access (less turns) at Somerset • Linkages of walk and cycleways • Lighting provision from Somerset Park to Coleraine • Developing activities in Forest Park e.g. off road cycle trails, Picnic facilities, glamping White water canoe training facility at Cutts • New footbridge to link Castleroe to Mountsandel • Fish friendly hydroelectric installation • Underwater fish observatory • Fish beat downstream of weirs • Viewing platform in Mountsandel Forest overlooking Cutts weirs 	 

Tourism and Recreation Gateways and Hubs - Locations		
Gateway - Coleraine - Christie Park/ Mountsandel/ Cranagh/ Marina & Waterfront		
Existing Facilities	Future Opportunities	Image
<ul style="list-style-type: none"> • Mountsandel Forest and Walkway • Archaeological site of interest - Mountsandel • Jetty & Pontoon • Regional Tourism Hub • Riversdale Park • Lodge Burn • Coleraine Marina • Riverside walks and cycle paths • Café / restaurants • Shops • Toilets • Public House • Commercial ships/harbour • Day boats for hire • Water sport Activity Centre 	<ul style="list-style-type: none"> • River Bann Walkways • Potential Centre of Sporting Excellence* • Additional Mooring Facilities at Mountsandel* • Riverside Animation* • Mountsandel Trail* • Mountsandel Forest – to provide views of sluice gates and locks • Mountsandel development of archaeological and historic visitor attraction • Interpretation, Orientation and Public Art* • Strand Road Frontage* • Redesigned Memorial Park* • Courtyard Development* • Network of pedestrian and cycling routes • Commercial Units* • Linkages to Town centre* • Maximising the Lodge Burn* • New Road Bridge* • Mixed Use Waterfront Development * • Refurbishment of Clothworkers Building* • Developing the early evening and Night Economy* 	



Tourism and Recreation Gateways and Hubs - Locations



- New Pedestrian Bridge (from Howard Place to Christie Park)*
- Reconfigured Harbourlands*
- Historical walking Route*
- Lodge Burn Walking and Cycle Trail*
- River Bann Pedestrian and Cycle Routes*
- Glamping/camping (in development at Crannagh)
- Further development of Watersports Activity Centre at Crannagh
- Provision of boat tours/ cruiser hire
- Potential location for water pump associated with district heating and power scheme for Coleraine Enterprise Zone
- Provision of floating restaurant/cafe







• *Source Coleraine Masterplan

Table 11: Tourism and Recreation Significant Sites

Tourism and Recreation Significant Sites - Locations		
Existing Facilities	Future Opportunities	Image
Lough Beg and Church Island		
<ul style="list-style-type: none"> • Historic Monument • Wetlands • Restricted access • Coarse Angling 	<ul style="list-style-type: none"> • Improve access by road and river • Interpretation and Orientation • Seamus Heaney Trails • Seamus Heaney HomePlace Linkages • Walkways to Church Island • Bird Watching Hides • Canoe access point 	
Newferry (East & West)		
<ul style="list-style-type: none"> • Canoe Steps Access • Jetty & Pontoons • Slipway • Parking • Water Ski club • Toilets • International wake board event 	<ul style="list-style-type: none"> • Changing facilities • Camping • Interpretation and Orientation • Fishing boat access to Lough Beg • Raised stands for fishing • Possible heritage interpretation at Diatomite site 	

Tourism and Recreation Significant Sites - Locations		
Existing Facilities	Future Opportunities	Image
Hutchisons Quay		
<ul style="list-style-type: none"> • Jetty • Slipway • Parking • Coarse Angling 	<ul style="list-style-type: none"> • Interpretation and Orientation • Coarse angling development 	
Portna		
<ul style="list-style-type: none"> • Parking • Showers • Lock Gates • Jetty / Pontoon Access • Slipway • Canoe Steps • Campsite • Game Angling • Riverside walk • WW2 pill box • Eel fishery • Fish Hatchery 	<ul style="list-style-type: none"> • Upgrade camping facility • Developing activities in Portna wood e.g. off road cycle trails, Picnic facilities, glamping • Linking walking and cycling trails • Interpretation and Orientation • Educational tourism/ talks at the lockhouse • Café development at lockhouse • Commercial Development of drydock 	

Tourism and Recreation Significant Sites - Locations		
Existing Facilities	Future Opportunities	Image
Movanagher		
<ul style="list-style-type: none"> • Parking • Toilets/shower and changing facilities • Lock Gates • Jetty / Pontoon Access • Canoe Steps • Campsite • Coarse Angling (in canal) • Game angling beats 	<ul style="list-style-type: none"> • Interpretation and Orientation • Promote the campsite • Development of glamping-site treehouse accommodation • Educational tours of the fish farm • Tubing activities in canal; • Hydroelectricity development 	
Carnroe Lock		
<ul style="list-style-type: none"> • Jetty / Pontoon • Toilets • Canoe Step • Rough Camping • Lock gates • Lodges (under development) • Game Angling 	<ul style="list-style-type: none"> • Holiday home development and lodges • Parking • Interpretation and Orientation • Glamping Pods • Toilet facilities • Riverbank steps and stands for angling • Game angling development • Hydroelectricity development 	

Tourism and Recreation Significant Sites - Locations		
Existing Facilities	Future Opportunities	Image
Agivey Bridge		
<ul style="list-style-type: none"> • Slipway access • Derelict industrial site • Bann North Woods • Powered water sports zone • Coarse Angling 	<ul style="list-style-type: none"> • Canoe step provision • Parking • Pontoons • Interpretation and Orientation • Steps and stands on riverbank for anglers • Canoe trail link to Brown trout restaurant/ cafe and golf course 	
Camus		
<ul style="list-style-type: none"> • Parking • Pontoons • Picnic Tables 	<ul style="list-style-type: none"> • Interpretation and Orientation • Interpretation and orientation • Development of outdoor classroom facility and walks • Riverside walk 	

8 Recreation and Tourism Opportunities in Lower Bann 5 Mile Corridor

The recreation, tourism and commercial opportunities context for the Lower Bann is derived from:

- The river and immediate river banks of the Lower Bann
- Tourism and recreational opportunities in the surrounding area.

For the purposes of this study a 5 mile corridor has been identified for assessment of the implications for the Lower Bann, but other opportunities may be derived from wider afield than this. This section looks at this wider context and the opportunities there may be for the Lower Bann itself.

In looking at the opportunities away from the Lower Bann itself, the “imbalance” of recreational and tourism activity needs to be highlighted, with significantly more activity and a higher density of users and businesses in the north of the study area (around Coleraine, Portstewart and Portrush and Ballymoney), than in the south.

8.1 Tourism Destinations

Nine tourism destinations have been identified in NI⁴², of which two, Lough Neagh and its Waterways and the Causeway Coast and Glens are located at the south and north of the study area, respectively and form the gateways to the Lower Bann. Arguably, Lough Neagh and its Waterways is one of the weakest of the destinations, from the point of view of market visibility for tourism, while Causeway Coast and Glens is one of the strongest, because of the level of visitation to the Giant’s Causeway.

Visitor attitude surveys have been conducted for these destinations and although subject to qualification, because of the relationship of the Lower Bann to both destinations and the sample size, there are interesting outcomes and contrasts which have implications for the way the Lower Bann aligns with these destinations and their product offer and the marketing of the Lower Bann.

Table 12: Tourism NI Visitor Attitudes Survey 2014

Visitor Attitude Surveys, 2014	Lough Neagh	Causeway Coast and Glens
NI visitors	85%	36%
Out of state visitors	15%	64%
Average party size	3.53	4.21
	35% of visitors chose the destination to take part in outdoor activities	35% of all visitors chose the destination specifically to enjoy the coast and explore surrounding towns, villages, beaches etc.
Places visited	58% Antrim Castle & Clotworthy House 19% Oxford Island	87% Giant’s Causeway 51% Carrick-a-Rede Rope Bridge
Activities	69% visited a forest, park or garden 43%, hiking or walking	58% visited a beach 52% hiking or walking

⁴² The tourism strategy review implications for these destinations are not yet known, at the time of writing

Visitor Attitude Surveys, 2014	Lough Neagh	Causeway Coast and Glens
Accommodation used	36% stayed with friends and relatives 21% hotel 11% Bed and Breakfast 7% camping 6% self-catering	28% Bed and Breakfast 26% hotel 12% self-catering 11% friends and relatives 7% guest house
Length of stay	40% a weekend 24% a day only 20% a week or longer	50% a week or longer 32% a weekend 8% a day only
Respondents' main descriptors for destinations	Relaxing (78%) Fun (29%) Familiar (21%)	Unique (74%) Memorable (73%) Inspiring (42%) Distinctive (34%) Exciting (31%)

Significant implications that the tourism strategy for the Lower Bann needs to reflect comprise:

- Offer Lower Bann experiences to those staying for longer periods in the Causeway Coast and Glens area
- Encourage those visiting Lough Neagh to divert to the Lower Bann by offering compatible activities (for which the Lower Bann is already well suited, e.g. outdoor activities)
- Assemble the tourism offer (outdoor activities, walking, hiking, cycling etc.) for the Lower Bann to promote to visitors to the two gateway destinations
- Work with accommodation providers to encourage their customers to divert to the Lower Bann

8.2 Tourism Strategies

The Lower Bann flows through four local authority areas, for which there are three tourism strategies and actions plans either complete or in draft final stage, at the time of writing.

Table 13: Destination Tourism Strategies

Tourism strategies	
Local authority	Tourism Strategy Status
Antrim and Newtownabbey Borough Council	Annual tourism action plan
Causeway Coast and Glens Borough Council	Adopted April 2015
Mid and East Antrim Borough Council	Final draft as at February 2017
Mid Ulster District Council	Adopted June 2016

A summary of the tourism strategies is given below, with implications for the Lower Bann (5 mile corridor) drawn out.

Antrim and Newtownabbey Borough Council

The main focus of the council is on developments at Toome and Lough Beg, although access from the east to Lough Beg (from Antrim) is more constrained than from the west (Mid Ulster). The Council is also interested in maximising opportunities on and around Lough Neagh and at Toome, finding mechanisms for joining and encouraging access from the Lower Bann to the Lough, and vice versa, and potentially onward to Antrim town and castle. Major opportunities have been articulated at Toome for a marina and hotel development.

Causeway Coast and Glens Borough Council

Tourism is worth £110m p.a. expenditure by overnight visitors to the new Council area, with 3,800 tourism related jobs or over 12% of local employment in the area is tourism dependent. Tourism is one of the key sectors in the economic strategy for the new authority. The destination – defined by the new local authority area - is the second most important in NI, from the point of view of number of overnight trips, income from tourism and the number of tourism establishments offering accommodation.

The Giant's Causeway, supported by Bushmills attractions, Dunluce and the Rope Bridge, create a cluster of attractions which bring in international and domestic visitors. Equally the area has well developed and strong events and can build its reputation further through these.

However, half of visitation and value from tourism is experienced in four summer months and issues of seasonality and equitable dispersal of tourism benefits across the whole council area are prominent. The area's natural environment of parks, river, coast, forest, glens and hills provide a high quality envelope within which passive as well as and adrenaline fuelled outdoor activities take place. Operators who have set up in the area recognise this and provide the area with a major reputational advantage.

The Causeway Coast and Glens Tourism Strategy comprises five components:

1. To generate more visitors, motivate them to spend longer in the area, spend more time and visit throughout the year
2. To communicate and engage with tourism operators and the private sector to generate their commitment to the shared vision and goals for the destination
3. To support tourism operators to start-up, grow and be more competitive and innovative
4. To grow specific sectors and initiatives that will bolster the destination's reputation – e.g. activity and events based tourism
5. To establish a Destination Management Organisation within the council

The important Causeway Coast and Glens implications for the Lower Bann corridor lie in:

- The number of outdoor activity operators located in and using facilities in the area, both on the coast and on the river
- Opportunities for enhancing Coleraine Town Centre, both in terms of public realm and the night-time economy
- Development of Mountsandel to present its archaeological heritage;
- Wildlife watching on the river and at the estuary, as well as in the sea
- Developing events as a major attractor

Finally, with such high visitation in the Causeway Coast and Glen's area, the challenge for the Lower Bann is to capture some of these visitors and motivate them to visit the Lower Bann.

Mid and East Antrim Borough Council

Mid and East Antrim is not a recognised tourism destination, but is located in close proximity to Belfast and Causeway Coast and Glens, which are recognised tourism destinations. The primary tourism offer for the area is based around the Causeway Coastal Route, with the need to develop the quality of the product and experiences to create reasons to stop, stay and spend.

While the character and natural heritage of Mid and East Antrim is attractive, and there are many things for visitors to do, the objective of positioning the district in out of state and international markets requires an unrelenting and unequivocal focus on what will provide standout and the strongest visibility. This standout will be derived from aligning all visitor experiences in the district to the Causeway Coastal Route. Tourism Ireland and Tourism NI have already indicated their endorsement of this approach, to the extent that Tourism Ireland is positioning the Causeway Coastal Route in GB and overseas markets as an integral continuation of the Wild Atlantic Way.

The primary themes underpinning the tourism potential of Mid and East Antrim are:

- The Causeway Coastal Route
- Culture and heritage
- Events and festivals
- Destination marketing
- Destination management

The approach to business development and industry support in the area will be driven through local area clusters, of which one, at Portglenone and the Lower Bann is immediately on the Lower Bann and another, at Gracehill and Galgorm, is on the 5 mile boundary. Private or community led, clusters are a proven mechanism for tourism operators to work together and co-market, as well as raise standards. The cluster focussed on Portglenone might broaden to include operators in Mid Ulster and in the Causeway Coast and Glens district area (e.g. from Kilrea).

Plan for a heritage centre at Portglenone are acknowledged as is the importance of the village as a hub for the area. The importance of Galgorm Castle Golf Club as host of the NI Open has already been highlighted. Equally, other events, e.g. those promoted at Portglenone, are seen as mechanisms for raising profile, visitation potentially off season.

The major constraint in the area is the shortage of accommodation to encourage longer stays and spend in the area.

Mid Ulster District Council

The aims and objectives of Mid Ulster's strategy are:

1. To develop three strategic tourism strands, around which the attributes of the area and the industry can cluster and to attract visitors. The three strands or themes are:
 - i. Seamus Heaney
 - ii. Archaeological sites, history and heritage
 - iii. Outdoor activities
2. To grow tourism as an economic driver for Mid Ulster
3. To manage the destination and create the preconditions for successful tourism

4. To profile and promote Mid Ulster to enhance the visibility of the area and boost visitation and spend
5. To support the dispersal of visitor spend and investment across the area

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

All three development priorities - Seamus Heaney, Archaeology, history and heritage and Outdoor Activities - align well with the opportunities along the Lower Bann and there are immediate plans for the development of a trail linking Seamus Heaney's poetry and literature to places and the landscape close to the Lower Bann, that deserve particular attention.

The Seamus Heaney HomePlace at Bellaghy is a £4.2m development which opened in September 2016. The trail is committed to by the Heritage Lottery Fund and is due for completion in 2017. Specific sites on the trail include:

- Lough Neagh
- Toome and Toomebridge
- Lough Neagh Eel factory
- The Lower River Bann, as it flows into Lough Beg
- Church Island on Lough Beg
- The Strand at Lough Beg (west side)

Other sites on the trail are located between Castledawson and the Lower Bann and around Bellaghy, Seamus Heaney's home and burial place.

Conclusions

Each of the tourism strategies demonstrates the varying degree of alignment of the Lower Bann with the priorities and actions in each Council area. Importantly, they each explicitly reinforce and support priorities and actions (see the Action Plan below) in the Lower Bann corridor. Thus,

- Antrim and Newtownabbey want to encourage access and identify Toome for a marina and hotel development
- Causeway Coast and Glens inter alia encourage outdoor activity operators and wildlife watching, support events, want to develop Mountsandel and enhance Coleraine Town Centre
- Mid and East Antrim acknowledge the shortage of accommodation to encourage longer stays and spend in the area and focus on the development of Portglenone and its industry
- Mid Ulster's three development priorities - Seamus Heaney, Archaeology, history and heritage and outdoor activities all align well with the Lower Bann and the Seamus Heaney trail development is a major opportunity for stimulating visitation

The importance of the four Councils to the Lower Bann cannot be overemphasised. They are the legislative leads for local tourism development and major facilitators for sport, recreation and community regeneration.

8.3 Tourism Product Audit

This section outlines the findings of an audit of the tourism product along the 5 mile corridor of the Lower Bann. This was compiled by desk research to identify tourism facilities in the corridor that are likely to be of interest to visitors. This research compiled data from the Local Authority tourism databases, Tourism NI, Waterways Ireland and tourism related websites such as discovernorthernireland.com and visitcausewaycoastandglens.com, TripAdvisor as well as local visitor oriented websites.

In total, the audit exercise identified over 750 tourism products along the 5 mile corridor of the Lower Bann. Some operators have multiple facilities e.g. Hotel, Restaurant and Bar / Marina, Café and Caravan Site/ Gallery, Retail, Café. These businesses are only listed once and under the main category of business operation.

Facilities with no or little online presence may not be identified and smaller facilities in remote rural areas and outside the main centres may not have been identified, nor will many facilities e.g. cafes identify themselves as tourist related. Equally, some facilities may have closed but still be included on web sites.

We have sought to include only those facilities that, in our judgement, are most likely to attract discretionary visitor spend and offer something that would be appealing to visitors. Therefore independent, locally owned cafes and restaurants are included while chain catering outlets such as McDonalds and Costa Coffee are not. Craft shops are included while newsagents are not.

Table 14: Tourism Businesses

Type of Business	Total
Accommodation	599
Activity Providers	76
Art Gallery / Craft / retail	11
Boat Supplies	1
Food / Beverage Operations	64
Garden Centre & Restaurant	1
Health & wellbeing	2
Marinas	5
Visitor Attraction	38
Visitor Information Centres	3
Total Tourism Businesses	800

Figure 15 maps the tourism operators within the 5 mile corridor. Figure 16 identifies the recreational zones along the River Bann.

Figure 15: Tourism Operators in 5 mile corridor

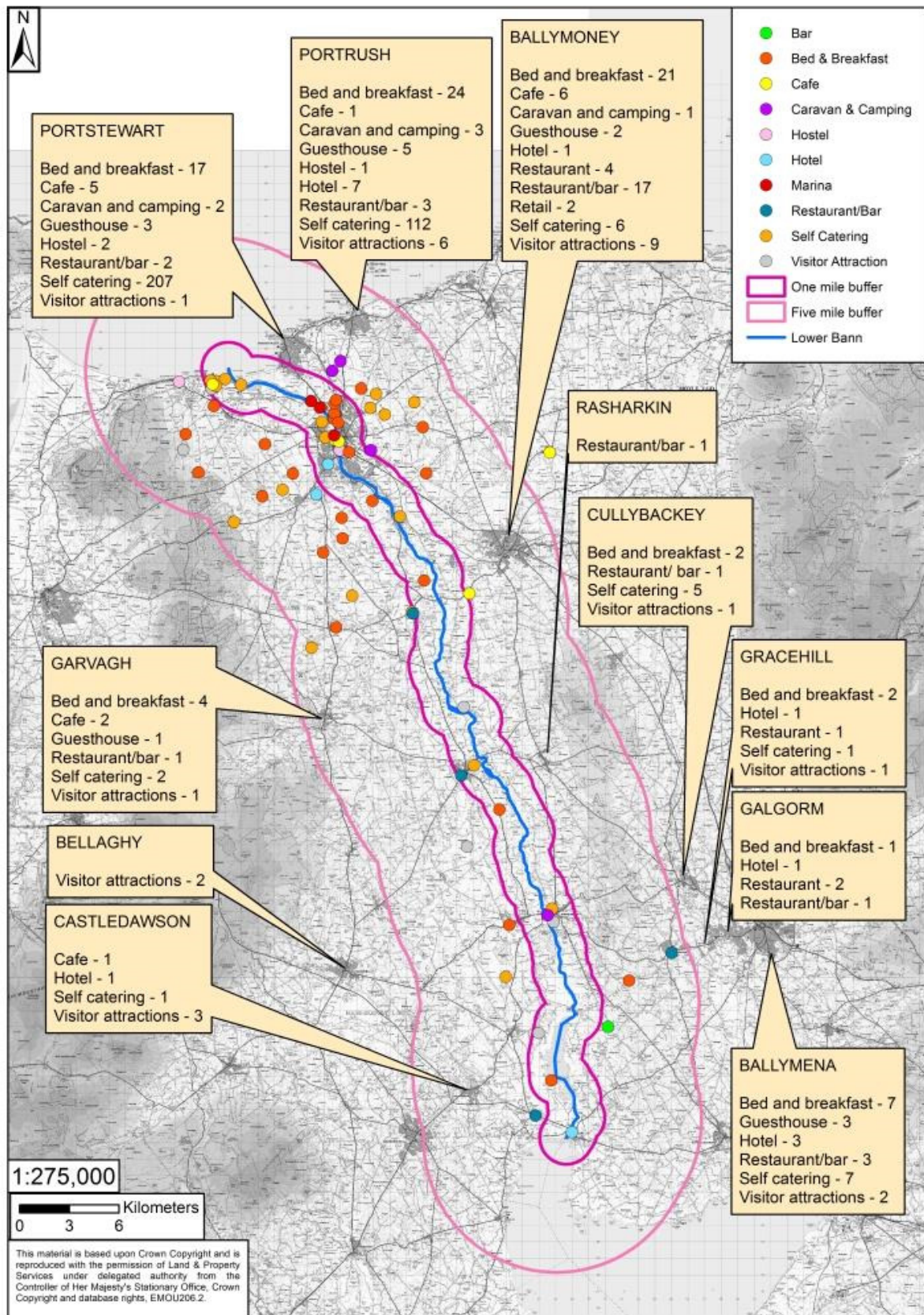
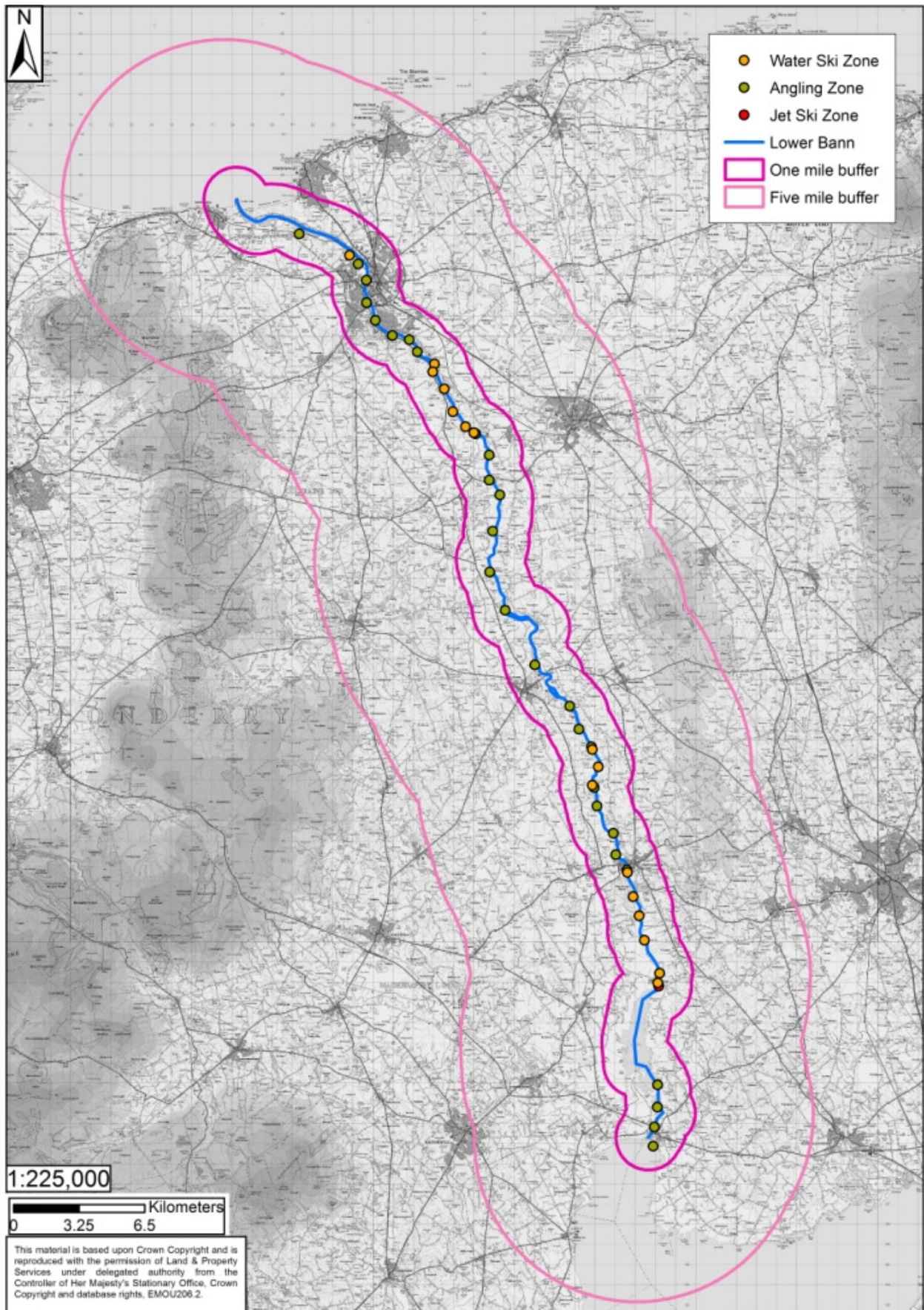


Figure 16: Recreation Zones on Lower Bann



9 Vision, Outcomes, Principles and Way Forward

9.1 Lower Bann Vision

The vision for the Lower Bann corridor emanates from the ambition to:

- Build a compelling reputation as a place in which to be active on and off the water
- Enhance the visibility and profile of the river corridor to encourage higher levels of visitation
- Develop the capacity to offer Blueway activities on and off the water
- Ensure that the Lower Bann’s reputation encapsulates and protects the quality of the natural environment
- Be a resource for local communities, residents and visitors
- Encourage and promote recreational, tourism and business opportunities

The vision for the Lower Bann waterway and corridor is to create a river corridor environment that is:

“The Lower Bann - a wonderful and accessible river corridor that generates and sustains a vibrant and healthy community and economy”

9.2 Outcomes – What will success look like?

What will successful achievement of the Vision and Outcomes, through the following action plan, look like? The following table catalogues the stepping stones to successful delivery of the project for the Lower Bann corridor.

Table 15: Outcomes

Outcomes	
1	Effective partnership established, delivering integrated development of the river corridor
2	The Lower Bann corridor established as an internationally recognised destination for tourism, heritage, recreation and sport including international events
3	The infrastructure of the Lower Bann corridor provides an attractive, highly accessible and usable resource for both water and land based activities
4	The Lower Bann corridor generates economic benefit through new business start-ups, employment and products
5	Local communities and visitors have improved health and well-being through access and participation in outdoor recreation and tourism opportunities
6	The Lower Bann Corridor is a catalyst for social inclusion, community cohesion and education
7	The natural heritage of the Lower Bann Corridor continues to be rich in biodiversity and is valued by both local communities and visitors alike.

9.3 Key Principles

A number of principles underpin the successful development of recreational and tourism opportunities and contribute to the achievement of the vision for the Lower Bann Corridor. These should guide how partners and stakeholders evaluate, manage and deliver opportunities and actions to encourage investment, recreational use of the river and the surrounding area and strengthen the market position of the Lower Bann.

These principles are:

1. **Partnership working:**

Making sure that delivery of the opportunities on and around the Lower Bann is enhanced through participatory working with stakeholders and partners.

2. **Engagement with stakeholders and communities:**

This includes asking communities and users for their opinion and priorities and for delivery agencies and stakeholders to be accountable for their investment and actions. This necessitates the establishment of regular and effective communication with local communities, the education community, businesses and recreational and sporting users and bodies.

3. **Sustainability – both environmental and economic:**

The environmental quality, attractiveness and appeal of the Lower Bann is demonstrable (with the number of environmental designations for instance) and action to support recreation and tourism activity must be taken within the context of protecting and enhancing the environment and supporting the reduction of the carbon footprint of visitors – by encouraging walking, cycling and non-motorised water sports.

4. **Promoting health and well-being;**

As well as linking into NI strategies and plans to support recreational and sport development and participation, all investments and developments in the Lower Bann corridor must be evaluated for their impact for generating health and wellbeing benefits. More sport or recreational visits (passive and active) are the aim.

5. **Promoting social and economic benefit:**

The Lower Bann is a facility and an attractor for local communities, domestic and international visitors. Its character as a local recreational resource supporting social development and cohesion is complemented as an economic generator through tourism.

10 Action Plan

A series of delivery actions are integrated into this Action Plan for the Lower Bann corridor, providing a framework for intervention and investment to meet the vision and objectives, including preparatory actions prior to adoption of the Blueway concept within the short term. The Action Plan has been prepared following the feedback from consultations, market analysis and input provided by steering group partners. The implementation of this Action Plan is the most effective way of delivering the stated outcomes and to achieve the Vision. The actions are “SMART” in nature and will provide a clear focus at implementation phase for the steering group in terms of delivery, reporting and monitoring.

The table below highlights what actions should be undertaken, what will be delivered, and which of the stated outcomes the action contributes to. For each action, key delivery partners have been identified, and a timescale for delivery proposed.

The structure of the action plan is presented under four headings:

1. **Strategic Management:** Provides an implementation structure and a co-ordinated approach for delivery
2. **Plans and Reports:** Creates the knowledge, evidence and strategic thinking to underpin development
3. **Development of Infrastructure:** invests in the development of hubs, significant sites and facilities
4. **Marketing, Events, Education:** Increases awareness and promotes use of the " Lower Bann Corridor" as a destination

The timescales for delivery are as follows:

- Short term (2017 – 2019)
- Medium term (2020 – 2022)
- Long term (2022 onwards)

The organisations identified for delivery and the timescales are indicative only and will be reviewed and confirmed by the Steering Group through the implementation phase. Abbreviations for potential partners are as follows:

Table 16: Potential Partners

Abrev	Organisation
Statutory Agencies	
WI	Waterways Ireland
TNI	Tourism Northern Ireland
SNI	Sport Northern Ireland
RA	Rivers Agency
DAERA	Department of Agriculture, Environment and Rural Affairs
NIEA	Northern Ireland Environment Agency
HLF	Heritage Lottery Fund
NIAF	Northern Ireland Angling Forum
Community Groups	
HIS	The Honourable the Irish Society
CANI	Canoe Association NI
RI	Rowing Ireland
D of E	Duke of Edinburgh/ Joint Award
IWAI	Inland Waterways Association of Ireland (Lower Bann & Lough Neagh Assoc)
Voluntary Sector Organisations	
TIDAL	Toome
KEG	Kilrea
PEG	Portglenone
WBCG	Coleraine
Councils	
ANBC	Antrim and Newtownabbey
CCGBC	Causeway Coast and Glens
MEABC	Mid and East Antrim
MUC	Mid Ulster

Action Plan					
Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
1 Strategic Management					
1.1	Steering group to manage the implementation of the agreed action plan	An integrated partnership delivering joint working and shared responsibility for the implementation of the action plan	Outcome 1	Steering Group (SG)	Short Term
1.2	Agree a regular stakeholder and community engagement programme	Key stakeholders engaged with in the delivery of the action plan	Outcome 1	SG	Short
1.3	Integrate with the four relevant councils' community, recreation and tourism development plans e.g. to create linkages with existing major tourism products in the area such as Giants Causeway, Game of Thrones, Seamus Heaney etc.	Improved joined up working for the Lower Bann corridor between councils and external agencies. Enhanced developments and economies of scale from strategic and integrated working	Outcome 1	SG	Short
1.4	Support and develop new tourism and recreational products and experiences by commercial operators and community groups	New start-up businesses along the Bann corridor. Clustering of businesses. Joint marketing of facilities and opportunities. New and enhanced opportunities for tourists and recreational users along the Bann Corridor	Outcome 4 & 5	SG	Ongoing
1.5	Coordinate the provision of a range of accommodation options for both domestic and international visitors	A diverse range of accommodation options provided, including camping, campervans, glamping, Bed and Breakfasts and guest houses, hostels & bunkhouses (including "houseboat" accommodation) established	Outcomes 2 & 4	SG	Short

Action Plan					
Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
1 Strategic Management					
1.6	Replace the River Users Code of Conduct and develop byelaws for the Lower Bann Navigation	Improved responsible behaviour by all recreational users in a structured, multi-zone activity framework	Outcomes 1 & 3	SG/WI	Medium
1.7	Improve mobile connectivity along the Lower Bann Corridor	4G and free Wi-Fi available at all key hubs on Lower Bann	Outcomes 1 & 3	SG	Short/ Medium
1.8	Improve communication with users of the river on water levels and flows	Digital technology solution implemented that provides live information on water flow and levels	Outcomes 1 & 3	RA/SG	Short/ Medium
1.9	Review and recommend appropriate changes to the legislation determining water level and flow management	Suitable level and flow maintained to maximise opportunity for recreational use of the waterway	Outcomes 1 & 3	RA/DFI/SG	Long
1.10	Develop a co-ordinated approach to volunteering	An integrated volunteer plan for the Lower Bann corridor. Promote opportunities for volunteering. Local people and visitors have strong sense of ownership of the lower Bann	Outcomes 1 & 3	RA/DFI/SG	Short/ Medium

Action Plan					
Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
2 Plans and Reports					
2.1	Commission primary market research to capture baseline figures on numbers and economic benefit derived from all aspects of recreational, tourism and commercial activity	Baseline KPIs established to underpin strategic development and provide a mechanism for effective monitoring	Outcome 1	SG	Short
2.2	Commission a comprehensive feasibility study into establishing a continuous riverside multi-use trail (walking and cycling) along the length of the river	Report produced which details and prioritises sections of trail development. Land ownership and costings established. "Quick wins" identified, contributing to continuous trail for full length of river corridor	Outcome 1	SG/SNI	Short
2.3	Following the study above, councils to review arrangements and develop implementation programme for countryside points of access to the riverbanks	Improved access along the Lower Bann River Corridor for both local communities and visitors	Outcomes 1, 3 & 5	SG/ Councils	Short
2.4	Carry out a feasibility study on potential and existing heritage sites, and connecting trails along with associated facilities	Key heritage sites identified and agreed. Trail development potential established. Funding sources identified	Outcomes 1 & 2	SG/NIEA/HLF	Short
2.5	Prepare a Blueway product proposition for the Lower Bann, based on evidence from the trail development studies highlighted above and stakeholder engagement	Blueway proposal defined through engagement with businesses and communities. Business case developed for key actions	Outcomes All	SG/WI/Private sector	Short

Action Plan					
Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
2 Plans and Reports					
2.6	Produce and implement an Angling Action Plan for game, coarse and sea angling	Co-ordinated plan created to prioritise development opportunities, attract visitors, support communities and the development of local angling clubs	Outcomes 1, 2, 4 & 5	SG/NI Angling	Short
2.7	Review possible locations for the installation of canoe and fish passes within any scheduled weir upgrades	Safer routes created through weirs for canoeists, & legislative requirements met in terms of fish passes	Outcomes 1 & 3	SG/WI/CANI/ DAERA	Short

Action Plan					
Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
3 Development of Infrastructure and Facilities					
3.1	Extend existing and create new trails along the Lower Bann at locations identified through the feasibility studies	Blueway trails established and improved access provided. Clear linkage between hubs and significant sites	All Outcomes	SG	Short
3.2	Create the Lower Bann Heritage Trail to connect agreed heritage sites and integrate with other heritage assets and trails in the Lower Bann corridor and Lough Neagh identified through the feasibility studies	Integrated connectivity between Mountsandel, Seamus Heaney Homeplace, Toome Waterways Heritage Centre, Lough Neagh Trail, Portglenone Trail	All Outcomes	SG/NIEA	Medium
3.3	Develop improved changing and toilet/shower facilities at key hubs and significant sites underpinned by Business Case	Funding sources identified & accessed. Facilities provided at hubs and where appropriate, at significant sites	Outcomes 2 & 3	SG	Short/ Medium
3.4	Support the development of visitor centres at Mountsandel, Toome and Portglenone to service visitor needs for information and to tell the story of the rich heritage of the Lower Bann e.g. Mesolithic, Christian, Industrial and Natural	Three high quality visitor centres in place and supported/operated by local authorities/commercial enterprise and communities as appropriate	Outcomes 2,4 & 7	SG/NIEA/HLF	Short/ Medium
3.5	Support a range of accommodation provision at hubs, significant sites and appropriately defined locations	Increased provision of accommodation along the corridor at suitable locations e.g. Portneal, Mountsandel/Cutts, Movanager, Cranagh	Outcomes 1,2 & 4	SG/ Private Sector	Short/ Medium

Action Plan					
Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
3 Development of Infrastructure and Facilities					
3.6	Support market-led development of marinas, cruise and day boat facilities such as the proposed marina at Toome (TIDAL group)	Increased provision of mooring facilities / new marinas /with appropriate services provided	Outcomes 1,2,3,4,5 & 6	SG/private sector/ community sector	Medium/ Long
3.7	Provide and/or improve suitable riverside car parks for outdoor activity users	Improved access for outdoor recreation at hubs and significant sites	Outcomes 2,3,5	SG/ Councils	Short/ Medium
3.8	Increase opportunities for access to the water through small craft, day boat & cruiser hire, evaluating the market and encouraging the private sector to make provision	Range of small craft and boat hire provided on the river. Increased numbers of visitors using the navigation	Outcomes 2,3 & 4	SG/WI/ IWA/ I	Short/ Medium
3.9	Improve navigation service provision – pump outs, water, lighting and electricity supplies at moorings	Improved service facilities at all appropriate jetties, moorings	Outcomes 2 & 3	SG/WI	Short/ Medium
3.10	Develop appropriate facilities on Lough Beg for wildlife watching, recreation and tourism which recognise environmental sensitivities	Increased visitor numbers to Lough Beg	Outcomes 2 & 7	SG/WI	Short/ Medium
3.11	Remove the metal rods from the weir at Toome and develop the standing wave for freestyle kayaking	A world class freestyle canoe venue in place	Outcomes 2, 3 & 4	SG/CANI/ DAERA	Short/ Medium

Action Plan					
Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
3 Development of Infrastructure and Facilities					
3.12	Develop an artificial canoe slalom site	World class recreation facility created	Outcomes 2, 3 & 4	SG/CANI/ DAERA	Short/ Medium
3.13	Upgrade access to canoe steps to avoid 180 degree turns at key locations where feasible	Improved access for canoeists	Outcome 3	SG/WI/CANI /RI	Short/ Medium
3.14	Increase provision of fishing pegs at Glenone and Portneal	Creation of sites that can attract and facilitate international angling competitions	Outcomes 2, 3, 4 & 6	MUC/NIAF/ SG/ Private sector	Short
3.15	Identify suitable waterside cafe sites and support development of cafes/restaurants	Enhanced customer facilities provided to improve visitor experience	Outcomes 2, 3, & 4	SG/ Private sector	Short/ Medium

Action Plan					
Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
4. Marketing and Events					
4.1	<p>Develop a Marketing Strategy based on the identified target visitor markets, appropriate market segmentation and identified visitor propositions, i.e.</p> <ul style="list-style-type: none"> • Bann Blueway • Heritage product • Natural environment and wildlife watching (e.g. Lough Beg/ Church Island) • Healthy active lifestyles • Water recreation activities e.g. cruising, angling, water sports, canoeing and rowing • Potential of film and TV to promote the area (e.g. using Game of Thrones as hook to key sites and opportunities to commission TV programmes) • Maximising linkages for Lower Bann content within local and national destination web sites • Develop “Lower Bann” shared stories for all tourism businesses to use when promoting the Lower Bann i.e. includes words, images, things to do, stories 	A strategic marketing and delivered to cohesively promote the diverse product range of the Lower Bann Corridor	Outcomes 1 & 2	SG	Short

Action Plan					
Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
4. Marketing and Events					
4.2	Develop an agreed identity or brand for use in all partners' and stakeholders' promotional and marketing activities and literature	The creation of a clear and consistent brand message to improve the awareness, visibility and appeal of the Lower Bann as a destination, across all signage and marketing material	Outcomes 1 & 2	SG	Short/ Medium
4.3	Develop and implement a signage and orientation plan	Consistent and integrated directional, Interpretative and orientation signage provided, to improve the visitor experience	Outcome 2	SG	Short/ Medium
4.4	Develop and promote a programme of Events, Competitions and Activities along the corridor to include: <ul style="list-style-type: none"> • International events and competitions • Engaged communities to promote health and wellbeing • A multi-disciplinary "Challenge Event" that incorporates all of the river corridor, i.e. an Adventure Race • Events on key dates (Easter, Bank Holidays, Halloween etc.) to promote 'Family Friendly' activity with things for children to do with parents, both on and off the water (e.g. Pokemon hunt, guides, interpretation, and treasure hunts along the Lower Bann) 	A programme that will engage with communities, promoting active lifestyles, as well as attracting tourists	Outcomes 2, 4, 5 &	SG/ Councils/ Private Sector	Short/ Medium

Action Plan					
Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
4. Marketing and Events					
4.5	Create a curriculum-led education package for day visits by schools, youth and education groups including water based outdoor education such as school field studies, sports activity and Duke of Edinburgh Award scheme	Increased participation and engagement with schools using the Lower Bann for curriculum based activities	Outcomes 5 & 6	SG/ Education sector/ Youth Groups	Short/ Medium
4.6	Review and update the Lower Bann Canoe Trail Guide and website. Review and update Lower Bann Navigation guide and website and promote increased use of the online guide	Improved access and updated information for waterway users	Outcomes 3 & 5	SG/ORNI/ CANI/WI	Short/ Medium

11 Next Steps and Monitoring

11.1 Next Steps

This study provides a guidance framework for the Steering Group in the progression of this project. The next steps will be:

- 1) Steering Group to act as the Implementation Team and the focus for stakeholder engagement
- 2) Establish baseline data and agree KPIs for measuring success
- 3) Develop an agreed Business Plan for years 1 to 3, based on prioritised actions, subject to agreeing resources, obtaining statutory approvals and securing funding
- 4) Monitor progress and review KPIs

11.2 Monitoring and KPIs

Assessment of the successful delivery of this study would normally be made on the basis of several measures and key performance indicators (KPIs)⁴³:

- Number of users, by activity/segment
- Number of trips
- Length of stay
- Number of overnight stays
- Spend
- Origin of visit
- Reason for visit
- Levels of satisfaction

A substantive issue however is the fact that the research foundation for assessing numbers of visitors and river users is weak and this is reflected in the actions in the Action Plan; part of this is because the river hasn't formed a discrete and identifiable destination to date, therefore research has not been structured to cover the whole area. Secondly, the length of the river is so great that only Waterways Ireland's Waterway Users Research addresses activity along the full length, but, to date, the sample for the Lower Bann is very modest.

Equally, many venues and sites have limited visitor surveys, so who visits, when and where they come from is unknown or can only be guessed at.

The table 17 below catalogues the qualitative KPIs and measures of success:

⁴³ Successful identification of visitors/users on the Lower Bann would normally be assessed through tourism data, measuring day and overnight trips made by Northern Ireland residents and visitors from outside Northern Ireland. Derived from a variety of sources, information is published by the Northern Ireland Statistics and Research Agency (NISRA)

Table 17: Measuring Performance

Measuring Performance	
Baseline Now (2017)	Measures of Future Success
New Steering Group of partners just formed	Effective partnership responsible for overseeing implementation of report findings
Communications with communities, river users and user groups not structured or systematic	<ul style="list-style-type: none"> • Establishment of consistent engagement and communication mechanisms • Regular consultation with stakeholders on development proposals and plans • Contribution of wider stakeholders to delivery plans
Rivers Agency daily online publication of water flow strength and levels	Real time data presented on mobile technology through app
No mechanisms for domestic and out-of-state marketing for visitation – limited focus by LAs on the Lower Bann in their marketing profiles	Quality promotion of the Lower Bann focuses around Blueway concept which provides a call to action for visitors
Baseline data of spend, visitation, satisfaction levels not catalogued	Research programmes in place to evaluate the success of investment and action on the Lower Bann
Heritage Trail, annual events programme and quality of natural environment not promoted and relatively unknown	Marketing activity in place to promote product strands and visitor experiences
Riverside walk and cycle ways are discontinuous	Concrete plan in place to achieve agreements and permissive access along the length of the river
Limited signposting and sporadic interpretation panels for visitors and users	Coherent and comprehensive signage strategy and work programme in place
Gaps in visitor facility provision along the river	Development proposals for all gap sites to provide facilities for users and visitor long the river length
Limited business engagement in opportunities for recreation and visitation along the river and in the river corridor	Engagement and communication programme with businesses to advise of opportunities together with business support and intervention programme to support start-ups, business expansion and more profitable operators

11.4 Funding Opportunities

The implementation of the Action Plan to deliver the vision is dependent both upon the commitment of the Steering Group partners and the ability to access funds from a variety of sources. There are a number of potential sources of such fund and these are catalogued in Appendix 8, as at the time of writing (March 2017). Significant amongst these are:

- Rural Development Programme 2014-2020, where Rural Tourism, Rural Basic Service, Rural Business Investment, Rural Broadband and Village Renewal categories may be eligible
- Sport Northern Ireland Everybody Active 2020 - Outdoor Spaces Programme
- Heritage Lottery Fund, Northern Ireland - Our Heritage, Heritage Grants, Parks and Places categories



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