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OUTDOOR
RECREATION
NORTHERN IRELAND

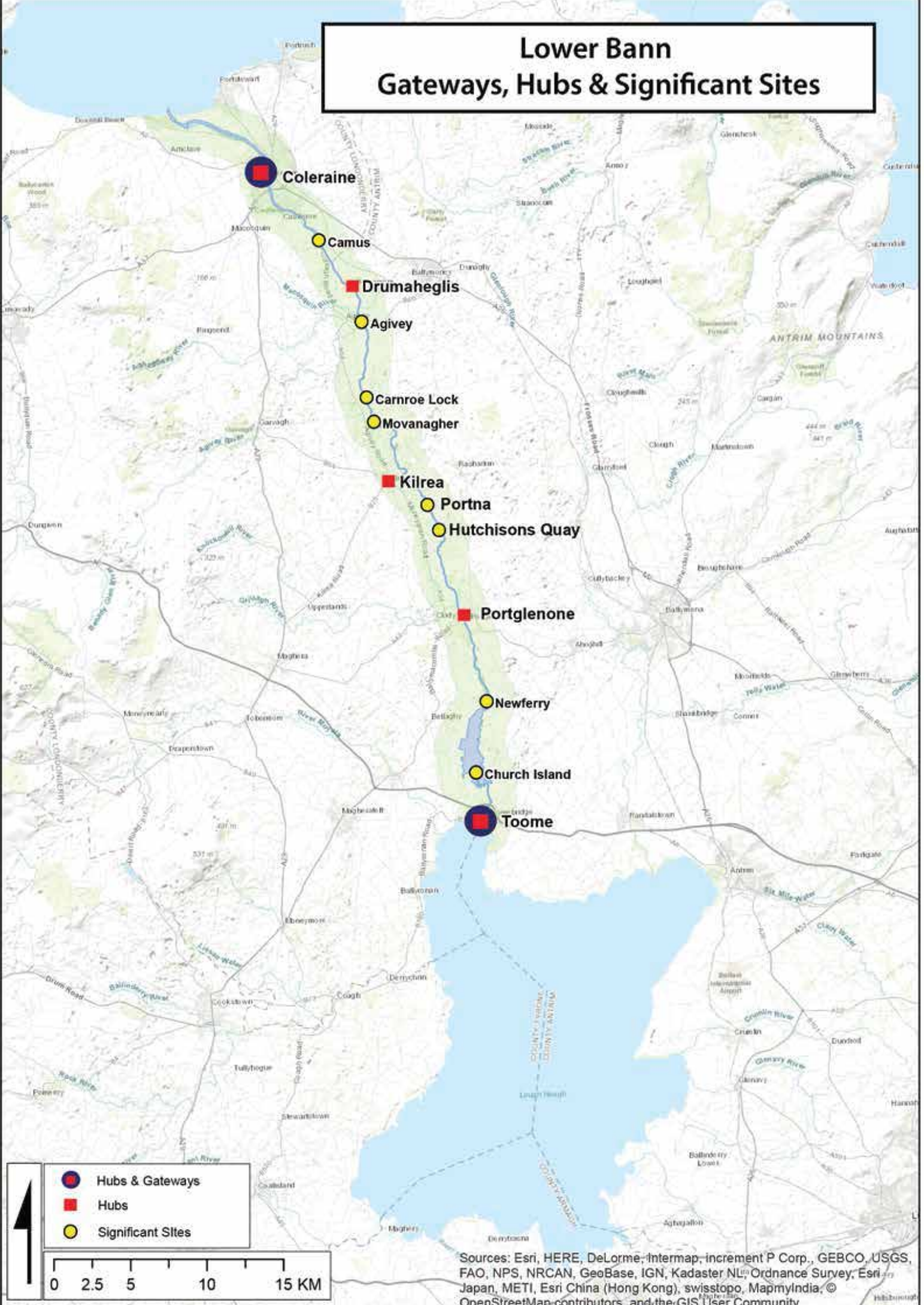


Recreational, Tourism &
Commercial Product Identification
Study for the Lower Bann

May 2017



Lower Bann Gateways, Hubs & Significant Sites



Sources: Esri, HERE, DeLorme, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, MapmyIndia, © OpenStreetMap contributors, and the GIS User Community

1. Introduction

This executive summary of the Recreational, Tourism and Commercial Product Identification Study for the Lower Bann Corridor provides an overview of the challenges and opportunities presented for development of this important 60km waterway, the largest river in Northern Ireland.

The study was commissioned by a partnership of stakeholders - Waterways Ireland, the four local authorities which bound the river (Antrim and Newtownabbey, Causeway Coast and Glens, Mid and East Antrim Borough Councils and Mid Ulster District Council) together with Tourism NI, Sport NI and The Honourable Irish Society. A steering group of these stakeholders was established to deliver this study.

The full report provides detailed analysis of the existing infrastructure and activities as well as identifying the potential opportunities for recreation, tourism and commercial development along the river corridor. This is available on line at www.waterwaysireland.org. The study will provide an integrated and strategic reference framework to inform cohesive implementation of appropriate sustainable development opportunities.

2. Background

The Lower Bann river corridor is rich in wildlife and its history, built and natural heritage, environment, landscape setting and visual amenity are highly rated. A wide range of landscape and environmental designations evidence this. Three major challenges have been identified which need to be addressed to allow the development of opportunities for recreation, sport and tourism, as well as to offer improved facilities for local communities:

- Overall, the Lower Bann is a “hidden” asset, not readily identifiable as a destination and actions to enhance the profile and make it better known will support the objective of capitalising on the Lower Bann’s role in social and economic development.
- Secondly, access on the water allows full length navigation but the river banks only allow fragmented river bank routes for walkers and cyclists.
- The river drains Lough Neagh, the largest freshwater lake in Britain and Ireland, with a catchment of 5,000 sq. km, the equivalent of 43% of the land surface of NI. Rivers Agency is the statutory agency obligated to manage water levels in Lough Neagh (between 12.45 and 12.60 metres above ordnance datum Belfast and has to release excess into the Lower Bann with consequent impacts on water levels and flows, which themselves impact water and river bank based recreation (e.g. boating, angling).

3. Strategic, Market and Environmental Context

Strategic Context

This study established a partnership of stakeholders that sought to create and embrace a unified strategic vision for the development of the Lower Bann corridor, to encourage appropriate and sustainable tourism, recreation and commercial development.

The study and action plan meets strategic needs identified in the Waterways Ireland Corporate Plan, the Outdoor Recreation Action Plan for Northern Ireland, The draft Tourism NI strategy and the tourism development strategies and draft community plans for each of the councils along the Lower Bann Corridor.

This plan takes cognisance of the local development plans which are being developed under the Regional Development Strategy and Planning Policy Statements.

The Draft Programme for Government in Northern Ireland (2016) articulates an outcome of improving wellbeing for all by tackling disadvantage, and driving economic growth. This study for the Lower Bann contributes to the delivery of these outcomes.

Market context

Three key markets have been identified within the marketing analysis section of the study:

- Local communities
- Domestic visitors
- International visitors

The local councils are in the process (2016) of developing community plans that have highlighted, through public consultation, a very significant demand for access to green (and blue) space for recreation that improves health and well-being. This mirrors the consultation for the development of the NI Outdoor Recreation Action Plan in which the demand for community trails was clearly voiced.

Tourism development authorities across both NI and ROI have carried out market segmentation analysis which cross match and reinforce each other. The following groups of visitors have been identified as being interested in the outdoor and adventure tourism product. The Lower Bann Corridor offers significant potential to align with all of these segments in terms of increasing visitor numbers from both domestic and international markets.

Domestic:

- Time Together - gentle walking, relaxation, natural scenery
- Mature Cosmopolitans - natural beauty, relaxation
- Family Fun - child orientated attractions and activities
- Young and Lively - contemporary culture and music festivals, events, the local scene

International:

- Social Energisers - talking to locals, festivals, entertainment
- Culturally Curious - Mesolithic or early Christian sites, gardens, unique local festivals and events
- Great Escapers - breath-taking landscapes, remote and exciting places, gentle exploration – walking, cycling, boating.

Environmental context

The natural environment of the River Bann is rich in biodiversity and can be divided into three distinct zones – Lough Beg; the river channel; and the Bann Estuary and coastal areas. There are significant national and European designations along the Lower Bann corridor and the development of any infrastructure, plans or programmes must take account of these designations through environmental impact assessments. Sustainable and responsible development principles must underpin all actions to ensure that the Lower Bann corridor remains a valuable and attractive natural asset.

4. Vision, Principles and Outcomes

The vision for the Lower Bann Corridor is:

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

Principles

A number of principles underpin the successful development of recreational and tourism opportunities. These must 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
2. Engagement with stakeholders and communities
3. Sustainability – both environmental and economic
4. Promoting health and well being
5. Promoting social and economic benefit

Outcomes

Following a series of stakeholder consultations along with desktop research, the steering group have agreed seven key outcomes that will be derived from the development of the Lower Bann Corridor. These outcomes are highlighted as follows:

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.

5. The development of key hubs and significant sites

Five key hubs and a further eight significant sites were identified that provide the structure and framework for connected and clustered activity and product development. These will have a significant impact in helping to unlock the full value of the Lower Bann corridor as a leisure and tourism resource.

Each hub should be developed to have the following opportunities / facilities:

- Mooring and parking provision (good access by road and by water);
- Service facilities (toilets and changing facilities);

- Information and orientation (both site-specific and reference to other hubs);
- Accommodation and associated hospitality services nearby;
- High quality outdoor amenity space;
- Directional signage to the hub;
- Broadband / 4G connectivity

The significant sites have less existing and/or potential development facilities and opportunities but nevertheless are complementary to hub facilities and are important for the delivery of the vision and helping to unlock the potential of the river corridor for recreation, tourism and commercial development.

HUBS		
No.	Hub	Attributes
1	Toome	Gateway to/from Lough Neagh Town services Lock & Jetty Lockkeepers cottage/amenity site Riverside walk
2	Portglenone	Town services Marina Major coarse angling facility Portglenone Wood/ Riverside walk
3	Kilrea	Town services Portneal Lodge/coarse angling stands Jetty Riverside walk
4	Drumaheglis	Caravan site and cafe Marina
5	Coleraine	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

SIGNIFICANT SITES		
No.	Hub	Attributes
1	Lough Beg & Church Island	Old church / Seamus Heaney / Environmental interest
2	Newferry East & West	Jetties Waterski facility
3	Hutchisons Quay	Jetty Riverside walk
4	Portna	Locks/Jetty & services Campsite and riverside walk
5	Movanagher	Wild campsite/ glamping Service facilities Vow jetty & wood
6	Carnroe	Lock Toilet Amenity site/ game angling
7	Agivey Bridge	Parking Angling
8	Camus	Wood/Car park Amenity site

NOTE: Table provides an overview of the sites identified as suitable for development. Further details of existing and potential facilities at each site are listed in the main report.

6. Action Plan

Following the feedback from consultations, market orientation analysis and input provided by steering group partners, an agreed Action Plan has been created. 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:

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

Councils	
ANBC	Antrim and Newtownabbey
CCGBC	Causeway Coast and Glens
MEABC	Mid and East Antrim
MUC	Mid Ulster Council

Voluntary Sector Organisations	
HIS	Honourable Irish Society
CANI	Canoe Association of NI
ANI	Angling NI
RI	Rowing Ireland
DofE	Duke of Edinburgh / Joint Award
IWAI	Inland Waterways Association of Ireland (Lower Bann & Lough Neagh Assoc)
	Community groups –
TIDAL	Toome
KEG	Kilrea
PEG	Portglenone
WBCG	Coleraine

Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
1 STRATEGIC MANAGEMENT					
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
2	Agree a regular stakeholder and community engagement programme	Key stakeholders engaged with in the delivery of the action plan	Outcome 1	SG	Short
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
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

Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
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
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
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
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
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
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

Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
2. PLANS AND REPORTS					
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 KPI's established to underpin strategic development and provide a mechanism for effective monitoring.	Outcome 1	SG	Short
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
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 river corridor for both local communities and visitors.	Outcomes 1, 3 & 5	SG/ Councils	Short
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

Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
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
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
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

Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
3. DEVELOPMENT OF INFRASTRUCTURE AND FACILITIES					
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
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 Centre, Toome Waterways Heritage Centre, Lough Neagh Trail, Portglenone Trail.	All Outcomes	SG/NIEA	Medium
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
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	3 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

Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
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
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
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
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/ IWAI	Short/ Medium
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
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

Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
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
12	Develop an artificial canoe slalom site.	World class recreation facility created	Outcomes 2, 3 & 4	SG/CANI/DAERA	Short/ Medium
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
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	NIAF/SG/ Private sector	Short
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

Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
4. MARKETING & EVENTS					
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, watersports, 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 	<p>A strategic marketing and communications plan will be delivered to cohesively promote the diverse product range of the Lower Bann corridor</p>	<p>Outcomes 1 & 2</p>	<p>SG</p>	<p>Short</p>

Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
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
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	<p>Develop and promote a programme of Events, Competitions and Activities along the corridor to include:</p> <ul style="list-style-type: none"> • International events and competitions • Engaged Communities to promote Health & 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

Ref	What will be done (Action)	What will be delivered (Output)	Result (Outcome)	Delivery Partners	Timescale
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
6	Review and update the Lower Bann Canoe Trail Guide & 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

7. Success indicators

What will successful achievement of the vision and outcomes, through the action plan, look like?

The main report sets out what the monitoring KPIs should be, and these should include:

- 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

This study has highlighted a substantive issue in that the research foundation for assessing numbers of visitors and river users is weak. This is partly because the river hasn't formed a discrete and identifiable destination, 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.

There is a priority need (addressed in the action plan) to collect the baseline user data for the Lower Bann corridor, to underpin the project going forward by providing business intelligence and establishing key metrics by which to measure performance.

8. 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.

